Assurance Argument
Shepherd University

Review date: 03-09-2026

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Welcome Message for Review Team

On behalf of Shepherd University, it is my privilege to convey our HLC Assurance Argument – proudly articulating our core mission and values.

This document represents the compilation of evidence-based data from many individuals who contributed their authorship. Shepherd's commitment to excellence is stronger than ever as we embrace our unifying theme of: ONEShepherd – One Mission, One Vision, One Voice.

We are committed to providing an exceptional educational experience for our students, and we hold sacred our responsibility to train the next generation of leaders, innovators, and model citizens.

I am especially proud to be a Shepherd alumna – and to have the extraordinary opportunity to return to the institution that prepared me for such a fulfilling career as a cancer researcher. I am here to make sure our students have every opportunity they need to succeed.

We sincerely appreciate your time in the review of our continuing legacy and trust that you will recognize Shepherd's strengths, our advancements, the challenges we are addressing, and our promising future.

We look forward to hosting you in March.

1 - Mission

The institution's mission is clear and articulated publicly; it guides the institution's operations.

1.A. Mission Alignment

The institution's educational programs, enrollment profile and scope of operations align with its publicly articulated mission.

Argument

Introduction

Shepherd University's governance structure, planning, and assessment processes provide the framework for success in fulfillment of its <u>mission, vision, and core values</u>. Shepherd's mission focuses on its six core values of learning, engagement, integrity, accessibility, service, and community, while its vision statement articulates the University's aspirations as an institution focused on high-quality, innovative programs that prepare an increasingly diverse community of students for success in a globalized society. The University communicates its purpose and goals to its constituencies through the mission statement, planning documents, and institutional and Board of Governors (BoG) policies. Acting as the foundation for all operations and strategic planning, the mission statement is accessible through the University's website, the course catalog, and in multiple handbooks.

Over the last twenty-one years, changes occurred at the state and institution levels that warranted a revision of the institutional mission statement. On April 7, 2004, then-Governor Bob Wise signed legislation approving a change of name from Shepherd College to Shepherd University and separating Shepherd from its community and technical college (CTC), which had begun under the auspices of then Shepherd College in 1974. Simultaneously, the University initiated the development of a limited number of graduate programs. In 2009, Shepherd joined the Council of Public Liberal Arts Colleges (COPLAC), further solidifying Shepherd's identity as a premier public liberal arts institution. In 2022, Shepherd joined the American Association of Colleges & Universities (AAC&U). As of April 2025, Shepherd's Carnegie institutional classification is "Mixed Baccalaureate" with 89.3% of degrees awarded as undergraduate degrees. Shepherd's student access and earnings classification is "Higher Access, Lower Earnings."

Shepherd's dedication to capitalizing on opportunities and challenges, as well as its commitment to the population it serves, is evidenced in revisions to the mission statement and core values, approved by the Board of Governors in December of 2022. <u>The revision process</u> originated with the <u>Board of Governors' establishment</u> of the Marketing and Branding Committee in February 2020. Due to the COVID-19 pandemic, the committee's work was delayed until August 2020. When work resumed, the committee engaged a consulting firm to conduct a brand study collecting information from an array of internal and

external constituencies. In April 2022, the revised mission statement, vision, and institutional core values <u>were presented</u> to the Faculty Senate, the Classified Employees Council, and the Student Government Association (SGA) for feedback. Using these groups' feedback, the committee created the final version and presented it to the groups for endorsement in October 2022. <u>The BoG granted final approval</u> for the revised mission, vision, and core values on December 15, 2022.

Shepherd's mission statement, vision statement, and core values form a cohesive plan for the future of the University, as summarized in the mission statement:

Shepherd University is a premier public university, grounded in the liberal arts and sciences, that prepares students for lifelong learning and success in their chosen pursuits and serves as a hub for academic, cultural, and economic opportunity.

Shepherd's mission and vision statements emphasize provision of "academic, cultural, and economic opportunity" to its community, as well as preparation of students for "lifelong learning and success" as "global citizens and leaders." Its core values describe the principles and methodologies that enable the University to realize the goals in its mission and vision statements, and the *2023-2028 Transforming Our Future* strategic plan is designed to facilitate that realization.

The core values statement communicates the most deeply held values of the University and is publicly articulated. It reflects the commitment to serve diverse constituencies, while striving to achieve and maintain exemplary levels of teaching and service. It is prominently located on the University's website, in the Faculty Handbook, and in the catalog. Mission and vision statements of <u>academic</u> and <u>administrative</u> units align with the University's mission and vision statements and core values.

These documents, taken together, define the purpose of the institution and guide its operations. To fulfill that purpose, Shepherd has created <u>specific strategies and tactics</u> to work toward the goals in the *Transforming Our Future* strategic plan. Each tactic has associated key performance indicators (KPIs), and a <u>designated party responsible</u> for its completion.

- Goal 1 focuses on the faculty, staff, and students of Shepherd University. Specific tactics are designed to create an optimal environment in which faculty, staff, and students succeed.
- Goal 2 focuses on the educational environment and learning opportunities available at Shepherd. Strategies and tactics include curriculum, experiential learning, and career/workforce readiness.
- Goal 3 addresses Shepherd's role within the geographic region. Strategies and tactics seek to continue expanding partnerships within the region as well as providing students with opportunities for engagement off-campus.
- Goal 4 focuses on providing and protecting physical and technological resources ensuring that Shepherd is able to serve the public for years to come.
- Goal 5 focuses on fostering a welcoming environment on campus with tactics outlining how Shepherd will meet the needs of all constituents.

The strategic plan is revised on a multiple-year cycle with the current plan cycle ending in 2028. The plan was developed by a team of faculty, staff, and student representatives.

Following additional <u>direct campus engagement</u>, the strategic plan was <u>approved by the Board of Governors</u> in September 2023. <u>Executive orders and legislation</u> at the federal and state level required revisions to the strategic plan, but these changes do not impact the spirit and substance of the original plan. The <u>revised strategic plan was approved</u> by the BoG in February 2025. The mission, vision, and core values are revisited as needed to reflect the evolution of the University's mission of service.

Shepherd's mission and vision define the institution as a "community of learners." This community includes traditional college-aged students, graduate students, adult learners, high school students, community members, and others who benefit from a Shepherd education. While Shepherd began in 1871 as a small state normal school and awarded its first degrees in Education in the 1930s, its remit rapidly expanded beyond Education; the University currently offers numerous types of credentials in a wide range of disciplines at the undergraduate and graduate levels, designed to serve its community.

Consistent with its mission, Shepherd encourages excellence in learning, teaching, service, access, and affordability (many of which are described in the Argument text addressing Core Component 3D). Located in the Eastern Panhandle of West Virginia, Shepherd's proximity to the Washington, D.C./Baltimore corridor allows for easy access to major metropolitan areas and recruitment of out-of-state students. Shepherd supports its increasingly diverse population of learners and provides high-quality educational opportunities and experiences at an <u>affordable cost</u>.

The University also encourages learning and experiences outside of the traditional classroom. Its core values of "integrity," "service," and "community" highlight personal responsibility and quality interaction with others, essential for the creation of responsible global citizens. Development of these qualities takes place both inside and outside of formal academic curricula, as discussed further in Core Component 1C. Learners in the Shepherd community bring a wealth of backgrounds and experiences, providing a rich environment for peer interaction. Shepherd works to foster an environment for this development, as evident in its <u>Civility Code</u> and other such initiatives.

Academic Affairs supports the mission of the University with its <u>commitment</u> to "a high-quality education experience, coupled with a responsibility to promoting scholarship and service." Linkage of this experience to the University mission is ensured by learning outcomes designed by academic units and the Core Curriculum Committee. Linkage of curricula to the institutional mission, planning documents, and strategic priorities is also evaluated in five-year academic program reviews and annual program viability surveys (as described in the Argument text addressing Core Component 3F). Shepherd's core values highlight the University's commitment to all modes and modalities of learning including traditional in-classroom instruction, digital learning opportunities, and educational experiences outside of the classroom.

In response to the changing demands of the region and considering the available resources of the University, Shepherd has amended its curricular offerings, including <u>eliminating or updating existing programs</u> or proposing new programs at both the <u>undergraduate</u> and <u>graduate</u> levels. The University has also expanded facilities for veterans, commuters, and international students by providing accessible student space and visibility on campus. The institution is also a cultural center for the region, with strong programs in the arts and culture (described in the Argument text addressing Core Component 1B). Thanks to

Shepherd's prime location, students, faculty, staff, and the community have access to many opportunities typically found at more urban institutions.

Consistent with the mission's core values of "learning", "engagement", and "community", the University provides many resources to undergraduate and graduate students, including: Accessibility Services; Career Services; Counseling Services; the Global Student Leadership Team; Orientation; professional advising; Residence Life; services for transfer students; Student Community Services and Service Learning; TRIO, tutoring, and Veterans Support Services (many of which are described in Core Component 3D).The Student Handbook includes missions of various student services organizations, as well as policies and guidelines aligned with the mission of the institution. Orientation programs in the Staff Handbook familiarize classified and non-classified employees with the University's history, mission, values, and helpful resources.

The mission informs external-facing operations as well. The Office of University Communications creates and disseminates press releases, publications, photography, advertising, and maintains social media and webpages. These communications promote the academic programs, current initiatives, student recruitment, public participation in campus events, and fundraising efforts designed to further the University's mission. The Shepherd University Foundation ties its mission to that of the University with an articulated goal to "connecting the dreams and passions of donors to the mission of the University and stewarding donor generosity across its campus."

From the mission and vision statements, through the Core Values and the *Transforming Our Future* strategic plan (all available to the public on the Shepherd website) to the details of institutional operations provided in academic and administrative webpages, Board of Governors documents, campus communications, and other public-facing sources, Shepherd maintains clarity and transparency in articulating its mission and the work undertaken to achieve its goals; the institution's current theme is *ONEShepherd: One Mission, One Vision, One Voice*.

Sources

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1.B. Mission and Public Good

The institution's operation of the academic enterprise demonstrates its commitment to serving the public good.

Argument

Shepherd University's mission statement articulates its public obligations to prepare "students for lifelong learning and success in their chosen pursuits" as well as to serve "as a hub for academic, cultural, and economic opportunity." The University's core values —learning, engagement, integrity, accessibility, service, and community—speak to each of these obligations.

As a liberal arts university, Shepherd equips students with a range of knowledge and skills necessary and appropriate for life and work in modern society. All baccalaureate students must complete the Core Curriculum which is designed around the Liberal Education and America's Promise (LEAP) standards as developed by the Association of American Colleges and Universities (AAC&U). These standards emphasize critical and creative thinking, written and oral communication, information literacy, teamwork and problem solving, civic knowledge and engagement, intercultural knowledge, ethical reasoning, and foundations and skills for lifelong learning, which map well onto skills employers seek in college graduates.

As a public university, Shepherd maintains a transparent focus on education. University processes, goals, and initiatives are designed to support the educational mission of the institution. Academic programs, student support, and administrative functions work in tandem to support student learning, and strategic planning and goals place education first.

Shepherd is a public university and state agency. As such, financial returns are not generated for investors, and the institution regularly assesses its academic and operational performance, while simultaneously being challenged with reductions in support from the state. Fundraising and grantsmanship provide additional support for the educational enterprise; the Shepherd University Foundation is the institution's primary external support organization. Expense data for fiscal years 2021, 2022, 2023, 2024, and 2025 shows that an average of approximately 52% of University expenditures are spent on education, toward direct instructional support, academic support, student services, and financial aid; inclusion of auxiliaries raises the average to approximately 73%.

Educational programs and opportunities abound at Shepherd. Shepherd's Continuing Education (including Education Professional Development classes) and Lifelong Learning programs provide continuing educational opportunities to members of the local community and region. The Robert C. Byrd Center for Congressional History and Education is housed on the main campus, and features faculty delivering lectures and presentations that are open to the public, as does the Bonnie & Bill Stubblefield Institute for Civil Political Communications. The George Tyler Moore Center for the Study of the Civil War oversees data archiving, offers educational events, and hosts a summer seminar for social studies

teachers. Additionally, Shepherd's National Writing Project chapter offers training for K-12 teachers and administrators every summer.

Shepherd's educational programs are accessible to non-traditional college students, such as first-generation students, returning adult students, and veterans. The University has programs specifically designed to address the needs of those students. Per the U.S. Department of Education's website, the federally-funded TRIO programs "serve and assist low-income individuals, first generation college students, and individuals with disabilities to progress through the academic pipeline from middle school to postbaccalaureate programs." The emphasis areas in the Regents Bachelor of Arts are useful for returning students wishing to further their careers. Since 2015, Shepherd has been recognized as a West Virginia Five-Star Challenge institution, reflecting the University's commitment to veterans and educating those who have served the country.

Active engagement with the community is commonplace. Shepherd boasts a long tradition of community service, including hosting the annual Relay for Life and Day of Service. WISH (Women Investing in Shepherd) is a collaboration with the Shepherd University Foundation. These are three of the many ways by which the campus connects student, staff, and faculty volunteers with the regional community.

The University plays an integral part in bringing cultural events, workshops, and other activities to the region. Each year, the institution hosts a wide range of concerts, art exhibits, films, lectures, and theater productions. These include the Contemporary American Theater Festival, performances from the School of Music and Department of Contemporary Art, Communication, and Theater, performances from the English program's Rude Mechanicals acting troupe, and events connected to the Appalachian Heritage Writer in Residence and Common Reading programs. These events draw audience members not only locally, but also from across the region and country, and demonstrate the University's ability to offer cultural opportunities to the greater community. The community is also welcomed at Community Music events and programs, which provide music education and training for participants of all ages.

Shepherd offers many types of events during the academic year that are well-attended by members of the community. The University hosts speaker series, including the President's Lecture Series, talks given through the George Tyler Moore Center for the Study of the Civil War, lectures and events sponsored by the Common Reading Program, Appalachian Studies, and our National Writing Project Site. Shepherd's Agricultural Innovation Center, a 158-acre forest and field property, offers hands-on workshops and training opportunities for all ages. Shepherd University Athletics offers camps for young athletes every summer. Students in programs such as Social Work, Nursing, Recreation Sport and Exercise Science, and Teacher Education provide services in the local community as part of their education at Shepherd, as does the Seeding Your Future Conference, a hands-on workshop for middle-school students to inspire them to consider careers in STEM. The Upward Bound program, administered through Shepherd's TRIO program, builds skills to help students achieve success in high school and post-secondary pursuits.

The Wellness Center welcomes both Shepherd and community members and engages with the community to promote health and safety in many ways. These include training up to 70 lifeguards annually to support local pools, and "Silver Sneakers," a program that provides affordable access to fitness for individuals 65 years and older. In 2023, Shepherd was

recognized as an "Age-Friendly University," demonstrating a commitment to creating and sustaining a campus accessible and open to members of the extended community.

Shepherd's relationship with the Shepherd University Foundation also facilitates programs and services that impact the larger community. Beyond provision of student scholarships and support of academic programs, the Foundation works to advance the University's mission and values through the Scarborough Society and Women Investing in Shepherd (WISH), a women's giving circle that funds grants for high-impact projects both on campus and in the larger community. The University's Comprehensive Development, Fundraising, and Annual Giving Plan also articulates additional mechanisms for alumni and community engagement.

Shepherd has a long record of involving representative internal and external stakeholders, including students and community members, in its planning processes. These stakeholders also serve on internal committees, such as programmatic advisory councils, and search committees at the executive level, such as the ongoing presidential search. These interactions inform University operations, and enable it to respond to the needs of its community and to provide curricula and enrichment opportunities based on those needs.

Sources

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- Robert C. Byrd Center for CHE
- Stubblefield Institute
- 5 Star Challenge
- RBA Program
- TRIO Student Support Services
- Veterans Support Services
- LEADS Program
- Relay For Life
- Student Community Service
- WISH
- Appalachian Heritage Writer in Residence
- CATF
- Common Reading Events
- Community Music
- Rude Mechanicals

- Agricultural Innovation Center
- Center for Appalachian Studies and Communities
- Common Reading Program
- George Tyler Moore Center
- President's Lecture Series
- Seeding Your Future
- Shepherd Athletics Camps
- Shepherd Writing Project
- Upward Bound
- Age-Friendly press release
- Age-Friendly University
- Scarborough Society
- Wellness Center 2025

1.C. Mission and Diversity of Society

The institution provides opportunities for civic engagement in a diverse, multicultural society and globally connected world, as appropriate within its mission and for the constituencies it serves.

Argument

Introduction

Shepherd's mission statement signals its intent to prepare students for "lifelong learning and success in their chosen pursuits" and "serves as a hub for academic, cultural, and economic opportunity." Each of the University's core values is intended to create a welcoming campus for all students, staff, and faculty while readying students to be life-long learners. The 2023-2028 *Transforming Our Future* strategic plan includes strategies targeted at developing experiential learning opportunities and career development starting in a student's first year as well as creating and sustaining a campus environment that is welcome to all people. These initiatives reflect the core values of the institution and are in turn reflected in publications such as the faculty/student/staff handbooks and the course catalog outlining the mission and core values of Shepherd.

As of Fall 2025, 67.8% of Shepherd's students are in-state (mainly from the Eastern Panhandle of West Virginia), with 32.2% coming from out of state (many from Maryland, Virginia, and Pennsylvania, with a small number of international students). Many (about 17.9%) are nontraditional in age. Shepherd's course modality and scheduling process is designed to serve the needs of both traditional and non-traditional student populations, including commuters, those active in careers, and those raising and/or supporting families, demonstrating the University's commitment to providing opportunities and access for promising students from all backgrounds.

The age and family income profiles of Shepherd students are also diverse. In Fall 2025, non-traditional college-aged students (students aged 25 and older, including veterans) comprised 17.9% of the total student population. 48% of undergraduates and 66% of graduate students receive Title IV funds. Many of Shepherd's students are also the first in their families to attend college.

Shepherd believes in fair treatment, access, learning opportunities, and advancement for all students, faculty, and staff. Programming in Student Affairs and Academic Affairs (see additional discussion in Core Component 3D) ensures that the campus is welcoming and inclusive to all. These programs reinforce the 2023-2028 strategic planning priorities and the mission, vision, and core values.

Shepherd's mission and core values detail the University's emphasis on engagement among members of the Shepherd community, which includes students, faculty, staff, alumni, and involved citizens. The University has a thriving undergraduate culture of student engagement, reflected in community service and learning both inside and outside of the classroom (examples further articulated in Core Components 1B and 3D).

Curricular Programs

Shepherd operationalizes its support of its varied student populations through core curriculum courses and through student programming, as outlined in the course catalog. The University's offerings, communications, and policies reflect the experiences, conditions, and opportunities of a multidimensional student body.

The Core Curriculum at Shepherd contains four goals for student learning and development. These goals support global competencies.

1. Knowledge of Human Cultures and the Physical and Natural World
2. Intellectual and Practical Skills throughout the curriculum
3. Personal and Social Responsibility
4. Integrative Learning

Competencies adopted from the Liberal Education and America's Promise (LEAP) plan, with minor modifications from the report of the Association of American Colleges and Universities, include Information Literacy, Collaboration/Teamwork, Lifelong Learning, Civic Knowledge and Engagement, Global Understanding and Respect, Multiculturalism and Diversity, and Experiential Learning. Every course in the second tier of Shepherd's Core Curriculum, with the exception of Wellness and Writing in the Major, addresses at least one of these competencies. Completion of the Core Curriculum is required for all baccalaureate-seeking students, with the exceptions for those pursuing the Regents Bachelor of Arts Degree (RBA) or transferring to Shepherd with a completed AA or AS degree.

Shepherd's curricular activities expose students to collective reflections, lived experiences, and experiential learning opportunities within a diverse and global society. Examples include:

- Activities in programs such as the Art History Minor, Aging Studies minor, Women's Studies minor, Psychology major, Spanish major, and Education major engage students with people from diverse communities.
- Per the Core Curriculum, each program has a capstone experience to prepare students for their career field.
- B.A. degrees include twelve credit hours of the same foreign language.
- The School of Music presents performances, master classes, and workshops with artists from a diverse range of musical cultures, traditions, and styles. These events are open to students regardless of major as well as the wider Shepherd community, as are other Community Music initiatives.

Shepherd promotes understanding of the many facets of the human experience through field and clinical placements in professional programs such as Education, Nursing, and Social Work, all of which provide services and opportunities to underserved and vulnerable populations. The Center for Appalachian Studies and Communities and the Global Studies programs host events, conferences, and community-based discussions using political, social, and economic interdisciplinary approaches to education. Students also participate in numerous types of experiential learning which provide opportunities in a range of placements. Shepherd's academic support programs help students achieve their academic and personal goals. These programs are committed to fulfilling ethical and legal responsibilities to ensure equal opportunity with mentoring and support programs providing support for at-risk populations.

Shepherd also offers flexible learning modalities, scheduling, and incentives to meet the needs of adult students and encourage them to return to college. Shepherd's fully online programs include the Master of Education in Educational Leadership (M.Ed.) and Master of Business Administration (MBA) degrees. The Regents Bachelor of Arts (RBA) for adult learners includes classes with compressed timeframes, online and evening courses, and credit for life and work experience. Shepherd RBA students also participate in courses through WV-ROCKS, a state portal that offers compressed-format courses fully online for adult learners. Shepherd continues to offer flexible course delivery scheduling and hours of operation in response to changes in student demographics and needs.

- Shepherd continues to offer a range of online and hybrid courses post COVID-19. In Fall 2025, 10.4% of courses were taught in a hybrid modality and 24.6% were taught completely online. Faculty resources and trainings on educational technology and expansions of online education through the Learning Management System have been created and implemented by the University's Instructional Designer
- The Martinsburg Center previously served as an off-campus site for MBA, RBA, and Dual Enrollment courses. In Fall 2023, the Shepherd University Board of Governors directed the President to close the Martinsburg Center for cost saving purposes. MBA, RBA, and Dual Enrollment courses are offered both online and in-person at Shepherd's main campus.
- Many offices remain open after 4:30 p.m. on selected days. The Advising Center, Bookstore, Office of Admissions, Office of the Registrar, and other University services all provide extended hours at high-demand times. The Scarborough Library and Accessibility Services also offer extended hours of operation during midterm and final exam weeks. The "24-Hour Room" in the Scarborough Library   provides after-hours access to a space where students can study and work on projects.

Additional Programming

Shepherd's core value of "community" states, "We strive to create a safe environment based on mutual respect and acceptance of differences." Shepherd's mission, vision, core values, and other policies and processes are designed to foster respect for individuals regardless of differences of race, creed, color, religion, age, disability, sex, sexual orientation, gender identity and expression, marital status, national origin, political opinions or affiliations, socio-economic circumstance, or veteran status. The University is also proactive about bolstering the broad institutional impact of support options for the campus community.

The value that the University places on civic engagement, pluralism, and distinct experience is evident in the mission statement, the strategic and master plans, and policies across the University. Units and initiatives with specific focus on these areas include: the Global Student Leadership Team and Accessibility Services; Veterans Support Services; the Office of Student Activities and Leadership; Program Board; Fraternity and Sorority Life ; and The Office of Student Community Services. This is also shown in cultural events and weekly news releases from University Communications, and RamPulse (available to Shepherd students and employees). Shepherd's Lifelong Learning Program and the Robert C. Byrd Center for Congressional History and Education are among the sponsors of non-partisan, non-political civic education forums on a variety of topics. The Stubblefield Institute for Civil Political Communications is housed in the Scarborough Library and provides opportunities for students, staff, faculty, and community members to engage in and promote civil political discourse.

Other areas of the University help to create and support the entire student population. Enrollment Management seeks to increase this support through scholarships and financial aid. Shepherd University encourages enrollment and retention of high performing students through merit-based scholarship and grant programs. The Ram Pantry provides food and essentials for students and employees in need, serving on average one hundred consistent clients per semester. The Ram Closet provides clothing and home good items for both students and employees in need. The Commuter Lounge provides on-campus space for commuter students to study and socialize. The Well is an indoor and outdoor space maintained by Counseling Services that offers a quiet space for students with sensory needs and a meeting space for mental health support groups. Shepherd offers multiple scholarships, including the Director's Scholarship, Dean's Scholarship, and President's Scholarship to encourage students from surrounding states to attend, and, in collaboration with the Shepherd University Foundation, administers the Last Dollar Fund, which helps close the tuition gap for students in financial distress with the support of donors. There are also transfer scholarship opportunities for students transferring to Shepherd from local two-year and four-year colleges.

Multiple campus committees are tasked with initiating, fostering, coordinating, evaluating and effectively communicating the service objectives of the University.

- The Success, Engagement, Accessibility, and Transparency Committee (SEAT) reviews policies and campus issues that impact engagement and belonging of students, staff, and faculty. The Committee advances the community's success and resilience as it ties to the University's mission, core values, and strategic plan.
- The Civility Response Team (CRT) is a group of faculty, staff, and student leaders who promote respectful treatment of all Shepherd community members by quickly identifying solutions and appropriate strategies to address acts of incivility.

The University encourages activities that prepare students for informed citizenship and workplace success. The programs inspire cooperation and collaboration for building and maintaining an inclusive campus community.

- Veterans Support Services provides services, space, and resources for student-veterans, as does International Student Services for international students.
- The Global Student Leadership Team is an organization of student leaders that engages the campus community through awareness, advocacy, and action for social change. Global Leadership Team Scholarships are awarded to full-time, undergraduate, degree-seeking students who demonstrate commitment to community belonging, civility, and mutual respect.
- Nondiscrimination services and accommodations including prevention services and policies in the Offices of Title IX Coordinator and Accessibility Services assist students who experience harassment, discrimination or violence, as well as students with documented disabilities and needs both in and out of the classroom. Students receive support with testing, accessing course information and technology, and other provisions.

Title IX of the Education Amendments of 1972 requires universities to provide a non-discriminatory educational environment. The University is committed to providing an equitable, inclusive, and respectful campus culture and environment, free from any form of harassment, discrimination, retaliation, or violence. Members of the campus community are

encouraged to report incidents of gender-based harassment, discrimination, or violence to the University's Title IX Coordinator, and campus climate survey results inform future initiatives. Section 504 of the *Rehabilitation Act of 1973* and the *Americans with Disabilities Act of 1990 (amended 2008)* prohibit discrimination on the basis of disability in programs and activities and ensures reasonable accommodations are provided both in the classroom and the residence halls. Through prevention education measures and equitable resolutions, Shepherd works actively to challenge and respond to bias, harassment, and discrimination in programs, policies, and practices.

Teams on campus continue to review and revise existing University processes and create new processes to address discrimination, harassment, and violence, including the Civility Code. The Office of Title IX continues to require "Respect" training for employees to encourage knowledge of multicultural competencies and the prevalence, impacts, and advocacy efforts to combat sexual harassment and violence.

Each year the University recognizes the accomplishments of faculty, staff, students, units, departments, and other functional teams that have given their time and effort to advance the University's mission. The Storer College and Phenomenal Woman Awards complement the development of a University community reflective of the modern world. Shepherd also continues the awards series for classified and non-classified staff, including the Above and Beyond, Making a Difference, Excellent Service to Students, and Ram Spirit Awards.

The National Survey of Student Engagement (2025) indicates that student connection to the institution, the community, and the world outside of Shepherd is a challenge, in the face of continuing resource limitations and difficulties in travel for current and prospective students. Fewer freshmen expect to participate in a study abroad program. (However, senior study-abroad participation is average; freshmen also report lower rates of discussions about study-abroad and other special opportunities, so they may be less aware of their options.) Fewer students interact with students from other countries, and seniors report that their time at Shepherd has contributed less to their understanding of people from other backgrounds.

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- Last Dollar Fund
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- Staff Awards and Recognition
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- Faculty-Affairs
- HR-Training-and-Development
- Non-Discrimination-and-Civility
- RBA WV HEPC Complete Handbook
- Stubblefield Institute

Criterion 1 Summary

The institution's mission is clear and articulated publicly; it guides the institution's operations.

Argument

Shepherd University's mission and vision statements articulate the University's position as a premier public institution within a globalized society, focuses on its core values of learning, engagement, integrity, accessibility, service, and community. Taken as a whole, these guide the operation of the institution, illustrating the University's commitment to the public good and to the communities it serves.

The University is the cultural and academic center for the region, fostering continuous lifelong learning in its diverse populations. Mutually beneficial relationships involving internal and external stakeholders aid the institution in promoting the public good, while enhancing academic and cultural opportunities for students and community partners.

Shepherd's commitment to its community is made manifest in its recognition of and support for the great variety of individuals and groups served by the University. Respect, equitable treatment, and opportunity for all are fundamental to the University's mission, and University operations focus on building and maintaining an environment in which each individual can achieve.

Sources

There are no sources.

2 - Integrity: Ethical and Responsible Conduct

In fulfilling its mission, the institution acts with integrity; its conduct is ethical and responsible.

2.A. Integrity

Actions taken by the institution's governing board, administration, faculty and staff demonstrate adherence to established policies and procedures.

Argument

Introduction

Shepherd strives to educate its students to be ethical, responsible citizens. In line with that mission, Shepherd's processes and personnel policies model that integrity in all areas of the campus.

As described in Core Component 1A, Shepherd most recently updated its mission statement in 2022. The revised mission, vision, and core values were reviewed by multiple administrative bodies before they were approved by the Board of Governors (BoG) in December of that year.

Shepherd ensures that its activities and actions are consistent with its mission and core values. The University has in place policies, procedures, and practices to promote and protect the integrity of its operations. Oversight and transparency of policies and processes, from the Board of Governors (BoG; see Core Component 2C) down, help ensure that Shepherd remains accountable to the public and functions with integrity. The faculty and staff at Shepherd deliver educational opportunities and support that align with the University's mission of service and its core values. The University is governed by policies and procedures for fulfillment of its primary functions, and as such abides by the ethical practices, policies, and procedures outlined in the appropriate handbook for faculty or staff. Policies and procedures are reviewed, created, and implemented in a system of shared governance that includes the BoG, University Assembly, Executive Leadership Team (ELT), Provost Council, Classified Employees Council, Faculty Senate and the Great Colleges to Work For Committee.

Fiscal Integrity

The Office of Finance, led by the Vice President for Finance and Administration, ensures that proper procedures secure the fiscal integrity of the University. These units report directly to the President; the Vice President for Finance and Administration staffs the Audit Committee and the Finance and Facilities Committee of the BoG. Quarterly reports are a regular part of BoG meetings. Each administrative unit manages its expenditures appropriately and in compliance with all federal, state, and University rules and regulations,

maintaining financial integrity.

Purchases and expenditures of the administrative units are reviewed regularly by the Business Office to ensure both compliance with university, state, and federal regulations and also that all units are operating within budgeted allocations. Oversight is enhanced through a quarterly financial statement review and statement of activities, which includes a variance analysis. This analysis is presented to the Executive Leadership Team and the Finance and Facilities Committee of the BoG. Faculty and staff who utilize purchasing cards (state-authorized credit cards) receive online training in relation to the West Virginia Ethics Act.

The Office of Finance is responsible for ensuring that proper fiscal management procedures are followed. The Vice President for Finance and Administration/Chief Financial Officer supervises management of the annual audit process. Annual audits are conducted of all state agencies, including Shepherd, via an external firm chosen by the state. This firm presents results, along with recommendations for improvements or changes, to the BoG. These audited financial statements are posted on the webpage of the Office of Finance, under the Financial Reporting link. The Office of Finance webpages provide policies and procedures related to student finances, payroll, grant management, and procurement policies and procedures. For example, as a member of the National Association of Educational Procurement (NAEP), Shepherd's Office of Procurement Services operates under the NAEP code of ethics. Procurement Services also conducts research to maintain the most effective purchasing practices and procedures.

Academic Affairs

Shepherd ensures that faculty and academic directors protect institutional integrity through maintenance of high standards in teaching, research, and service activities. Policies and procedures ensure equitable treatment of personnel and protect the right to participate in institutional governance. Located in the Faculty Handbook, these criteria include faculty responsibilities and behaviors, promotion and tenure guidelines, term appointments, salary policies, and changes in personnel policies or professional duties.

To help ensure this integrity, each tenure-track faculty member's teaching, service, and research is evaluated by the department chair or director and college dean in the form of an annual review of faculty. The annual review includes feedback from students via formal course evaluations; these are conducted each term for all courses taught in that term. This annual review is part of the promotion and tenure process detailed in the Faculty Handbook. The timeframe for review is different for tenured faculty, as also described in the faculty handbook.

Research Policies

University policies regarding integrity and ethics in research were approved by Executive Staff (now the Executive Leadership Team) in 2011 after vetting by appropriate internal stakeholders. These policies are now overseen by the Research Policy Management Group, which serves as a clearinghouse for the offices with oversight of these policies. Additional oversight is also provided by Shepherd's Institutional Review Board (IRB) and Institutional Animal Care and Use Committee (IACUC) (see Core Component 2E for more on these committees).

Student Affairs

Compliance with federal and state laws and guidelines helps Shepherd protect its community. External and internal laws and guidelines, such as the Family Educational Rights and Privacy Act (FERPA) and the Right to Privacy and Student Records policies outlined in the Student Bill of Rights, safeguard the privacy and data of students. Internal policies and guidelines for student rights are presented in the Student Bill of Rights and the Student Handbook, and on webpages of the Office of the Registrar and the Office of Financial Aid .

The University informs its community about academic and non-academic responsibilities of the educational enterprise. Student responsibilities covered in the Student Handbook include academic freedom and integrity, class attendance, plagiarism, and appropriate conduct. Students are informed of Shepherd policies through the Student Handbook and the Academic Catalog, including Shepherd's policy of non-discrimination; a non-discrimination and civility statement explains standards of interaction and behavior expected of all community members.

Conflict resolution procedures for adjudication of cases involving misconduct ensure fair outcomes for students. Organizational units dedicated to this purpose include:

- The University Ombudsperson, who can assist students in understanding their responsibilities, rights, and acceptable conduct;
- The Vice President for Student Affairs, Coordinator for Student Conduct, and Title IX coordinator, who oversee the Student Code of Conduct and the enforcement of University rules and regulations, including those applied to residential life.

Human Resources

The Office of Human Resources publishes the Shepherd Staff Handbook and the Faculty and Staff Search Manual, and offers staff development and training resources. In addition, Human Resources policies and procedures have broad application to uphold and protect the integrity of the institution. University policies prohibit discrimination, workplace violence, sexual assault, and other behaviors damaging to institutional integrity. These policies apply to all members of the University community; policies are reviewed for alignment with state and federal laws, or as institutional conversations dictate. Procedures are in place to educate and inform students, faculty, and staff, and are available in the handbooks noted above.

The Campus Ombudsperson is empowered to resolve specific types of allegations of harassment or discrimination under Policy 18 of the BoG. The Shepherd University Police Department, Title IX Officer, and Counseling Services provide assistance and support for victims of sexual assault. Board of Governors Policy 4 is in compliance with a number of state and federal regulations.

As described in Core Component 1C, the Success, Engagement, Accessibility, and Transparency Committee (SEAT) makes recommendations to appropriate bodies and works to support the University's goal of a more representative staff and student body.

Campus Services

Campus Services includes the Bookstore, Dining Services, the Rambler Card Office, Residence Life, the Student Center, and the Wellness Center, as well as Conference

Services, event concessions and hospitality, vending, and apparel licensing. Campus Services strives for honesty and fairness in its actions, and works with other offices as needed to ensure a good value proposition for Shepherd students, staff, and visitors.

Campus Services welcomes student and stakeholder input and <u>engagement</u> through participation in Student Government Association meetings to discuss room and board fees and facility upgrades, surveys to gauge needed improvements to housing and dining operations, work with student groups to determine menus and service hours for Dining Services, and negotiation between faculty and publishers to identify the best and lowest-cost course materials (also discussed in Core Component 4C). The decisions based on these inputs are better informed, more objective, and ultimately tied to the institutional mission.

Integrity also informs the Division's training and development of student and professional staff to ensure excellent customer service and preparation for the expert and often safety-related services that are delivered to end users, as well as maximizing risk management. For example, Residence Life conducts two periods of extensive development ahead of the fall and spring semesters <u>for Resident Assistants</u> including, among many topics, training for QPR suicide prevention, community development, mediation, anti-bullying, and facilities basic skills and reporting.

Computing and Information Technology

Technology is a critical tool for the acquisition of knowledge, teaching, and research; however, as with any tool, it can be susceptible to abuse. Information Technologies Services (ITS) sets forth <u>policies and guidelines</u> that govern technology use on campus. These cover acceptable use and IT security (BoG Policy 35), among other areas.

Banner is Shepherd's Enterprise Resource Planning (ERP) software for managing University records. New Banner users must be authorized by a <u>Banner Data Custodian</u> before access to data is granted, to ensure that only appropriate, authorized, and trustworthy individuals have access to confidential Banner data.

Athletics

Shepherd Athletics maintains a comprehensive structure of policies, procedures, and educational initiatives to ensure full compliance with NCAA Division II regulations and to uphold the highest standards of integrity, equity, and student-athlete welfare. These policies, documents, and ongoing educational efforts—including those focused on ethics and leadership—ensure that Shepherd Athletics consistently operates with integrity and maintains full alignment with NCAA, Pennsylvania State Athletic Conference (PSAC), and institutional expectations.

In May 2025, the NCAA Committee on Infractions issued penalties to Shepherd University for NCAA rules violations that occurred during the 2021–22 and 2022–23 academic years. The violations stemmed from the University's failure to adequately monitor eligibility certification processes and compliance with financial aid policies within the Athletics Department.

Shepherd University self-reported the issues to the NCAA in fall 2023 and conducted a comprehensive internal investigation. The review determined that 44 ineligible student-athletes across 10 sports practiced or competed in 265 contests, including 15 postseason

contests, during the affected years. Some of these student-athletes also received expenses and/or financial aid while ineligible or uncertified.

As a result of the findings, the University and NCAA enforcement staff agreed to a series of penalties and corrective actions. Shepherd University was placed on two years of probation and assessed a $5,000 fine. The University was also required to vacate team and individual records in contests in which ineligible student-athletes participated. Prospective student-athletes will receive written notification that the University is on probation and the reasons for that before an official paid visit to campus, or before signing an institutional financial aid agreement when being recruited. In addition, Shepherd must submit written monitoring reports to the NCAA to demonstrate continued compliance and oversight moving forward.

In response to the NCAA infractions case, Shepherd Athletics has strengthened its compliance structure through several key initiatives. Collaboration between the Athletics Compliance Officer, the Registrar's Office, and the Faculty Athletic Representative has been increased to ensure proper academic certification of all student-athletes prior to each academic term. The Compliance Committee —comprised of representatives from the Registrar's Office, Financial Aid, Admissions, Academic Advising, Student Affairs, and the Faculty Athletic Representative—has been reinstated and now meets at least bi-monthly, with General Counsel included. Compliance procedures related to eligibility certification have also been reinstated, and the Faculty Athletic Representative now reviews and signs all eligibility checklists alongside the compliance officer, athletic director, and head coach. Shepherd Athletics submitted its required report to the NCAA by the July 1 deadline, and the PSAC on-campus compliance audit will take place in spring 2026. Representatives from the Registrar's Office and Financial Aid are required to review presentations from the NCAA Regional Rules Seminar to better support compliance education.

In addition to focused, department-wide compliance training, the Athletics Department conducts an annual athletic orientation for all staff, providing new information, reviewing policies and procedures, and offering professional development opportunities. Coaches, staff, faculty, and student-athletes continue to receive education on relevant policies and procedures throughout the year. Athletic Department staff receive monthly compliance education during department meetings covering critical legislation and updates, while beginning-of-year and end-of-year compliance meetings with student-athletes are conducted annually. The Student-Athlete Advisory Committee (SAAC) also participates in monthly compliance education sessions. Education measures, letters of admonishment for violations and rules interpretations citing applicable bylaws are disseminated via email whenever questions or issues arise. Monthly compliance-focused email communications further reinforce rules education across the department, and an Annual NCAA Compliance Report is provided to the President to ensure continued institutional oversight and accountability.

Long-term planning is supported through the department's Athletic Strategic Plan and Gender Equity Action Plan which outline goals and measurable initiatives related to competitive success, student-athlete experience, gender equity, and operational effectiveness. Additionally, the Student Experience Survey and Sports Interest Survey are administered to gather data that inform decision-making, resource allocation, and program development.

Shepherd Athletics provides comprehensive policies within its Operations Manual, Student-Athlete Handbook, and its website under "Inside Athletics." These resources address NCAA

rules and regulations, eligibility requirements, financial aid, and recruiting processes. Updates to policies are reflected in revisions to departmental documents.

The Director of Athletics attends the NCAA Convention annually for educational sessions and legislative business. The Assistant Director of Internal Operations and Compliance attends the annual NCAA Regional Rules Seminar, which provides formal training on legislative updates, interpretations, and compliance expectations that guide institutional operations. These policies, documents, and ongoing educational efforts—including those focused on ethics and leadership—ensure that Shepherd Athletics consistently operates with integrity and maintains full alignment with NCAA, PSAC, and institutional expectations.

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2.B. Transparency

The institution presents itself accurately and completely to students and the public with respect to its educational programs and any claims it makes related to the educational experience.

Argument

Shepherd presents itself to its students and to the public primarily through its website and through social media. In addition, it releases reports and press releases through the Office of University Communications.

Through its website, Shepherd presents extensive resources to current and future students, families, alumni, staff, faculty, visitors, and community members; sitewide uniformity of design streamlines the user experience. The University homepage links to information regarding course offerings and class schedules, admissions requirements, faculty and staff credentials and contact information, tuition and financial aid, University organization and governance, and program accreditations. Drop-down menus under each listed population connect users to information of interest. A customized Google search engine is also provided. The site is dynamic, with a news spotlight that promotes student, staff, and faculty accomplishments, as well as University news headlines. The website is decentralized, with many departments and offices in charge of their own content; University Communications oversees all news, calendar items, the homepage, and emergency announcements.

The Office of University Communications maintains an active institutional presence on social media outlets such as Facebook, Flickr, Instagram, and LinkedIn, which are linked at the bottom of the Shepherd homepage. Shepherd's social media help the University to reach an audience that may not receive its news through traditional news outlets; this connects the University with young audiences who access their news through technology and social media, as well as with remote alumni who do not have access to University news via regional news outlets.

Releases and publications issued by the Office of University Communications are based on public record (documentation such as letters and emails), official institutional communications and statements from the President and the Executive Leadership Team, and items submitted by faculty, staff, and administrators via the University Communications online job request system.

Official Shepherd social media items are based on University releases and announcements. Items produced by University Communications are reviewed and vetted by the Executive Director of University Communications before they are released to the public and media outlets.

Provision of institutional information to the public via University webpages maximizes transparency and accountability of institutional operations and allows for ready distribution of information and updates.

Governance Structure

As shown on the <u>campus-wide organizational chart</u>, the Board of Governors is at the top of the University's governance structure. Its webpage contains information regarding Board activities, bylaws, and relevant policies. Academic Affairs provides a separate organizational chart and a directory of faculty at its site.

Accreditation

The <u>Consumer Information</u> page demonstrates Shepherd's compliance with the Higher Education Act of 1965 (as amended by the Higher Education Opportunity Act of 2008), and contains institutional information such as accreditations and affiliations, health and safety information, and student outcomes such as retention, graduation, and licensure pass rates. These pages are periodically reviewed for accuracy throughout the academic year and as new data, reports, and actions are made available.

Requirements and Costs

The <u>Admissions page</u> features prominent links for incoming first-year students, transfer students, returning students, international students, high school dual enrollment students, non-degree students, and graduate students. Visitors find admissions requirements, as well as information on tuition and fees, academic programs, scholarships, payment information, and other information about Shepherd.

The Office of Financial Aid also provides clear links to information about tuition and fees, various types of aid and assistance available to students, loan counseling, and the <u>Satisfactory Academic Progress</u> (SAP) policy, as well as a link to the <u>Shepherd Net Price Calculator</u>.

Academics

The <u>Academics</u> page contains links to information regarding the University's academic offerings. These include links to majors and minors; colleges, schools, and departments; the Core Curriculum; and various other academic and non-academic offerings. Unit heads review the accuracy of such information annually prior to the publication of the next year's catalog of academic programs and course offerings. The Academic Affairs page links to the <u>Academic Affairs Organizational Chart</u> and Faculty Directory. This information is updated annually by the Office of the Provost/VPAA. More detailed information on the faculty can be found at each departmental website, with links at the Colleges, Schools, and Departments page. Each department maintains its own website.

Research

Shepherd posits that knowledge, skills, and intellectual inquiry are essential to prepare all students for an increased role in society. Research plays a vital role in the development of these abilities.

Shepherd's commitment to educational and meaningful research is shown through the following current initiatives, as well as those in the recent past:

- Student capstones. Shepherd is a member of the Association of American Colleges

and Universities, and implements Liberal Education and America's Promise (LEAP) outcomes as the basis of its Core Curriculum. As described in the catalog, Goal 4 of LEAP, Integrative Learning, includes a capstone at the end of the student's undergraduate experience. Often, the capstone involves presentation of original research in the discipline performed by the student under the guidance of faculty. Illustrative examples include those in the Department of English, History, and Modern Languages.

- The Exhibition of Undergraduate Research and Creative Endeavors was a virtual event held for multiple years during the COVID-19 pandemic, allowing students to showcase their research and other projects for students, faculty, and the greater community.

Shepherd research initiatives are highlighted in press releases and various publications overseen by University Communications.

Student Affairs

The Office of Student Affairs maintains a webpage listing numerous resources and student activities, including RamPulse, the Student Government Association, Student Life Council, Fraternity and Sorority Life, the Global Student Leadership Team, Student Community Services, and the Program Board.

The Office of Student Community Services places students in positions in the community from which they can benefit the regional area while developing as leaders. The Office also provides leadership development programs and conducts charitable initiatives for the community. Programs include Alternative Spring Break (where students assist with regional development in various parts of Appalachia); Our Campus Cares (which centralizes community contribution efforts); and Shepherd's Relay for Life (which raises funds for the American Cancer Society).

Religious or Spiritual Development

As a public liberal arts institution, Shepherd makes no specific claims regarding the religious or spiritual life of its students. Nevertheless, a wide variety of groups for religious and spiritual practice are available for students. These have ranged from the Fellowship of Christian Athletes to Shepherd University Pagans to the Shepherd University Secular Student Alliance. Opportunities for religious and spiritual practice also are available in Shepherd's programming for its community.

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- English Capstones
- Global Student Leadership Team
- Greek Life
- NSSE25 Combined Reports
- Our Campus Cares
- Program Board
- RamPulse _ Religious Spiritual Organizations
- RamPulse
- Relay For Life
- SGA
- Student Community Service
- Student Engagement
- Student Life Council
- Undergraduate_Research_Exhibition
- Student Research Highlighted

2.C. Board Governance

In discharging its fiduciary duties, the institution's governing board is free from undue external influence and empowered to act in the best interests of the institution, including the students it serves.

Argument

Introduction

Board of Governors

Institutional governing boards for public institutions of higher learning in West Virginia are established by WV Code §18B-2A. Shepherd University is governed by a twelve-member Board of Governors (BoG) that is empowered by and acts in compliance with WV state code. The general powers and duties outlined in this code cover the authorizations and restrictions of Board activities:

- The determination, control, supervision, and management of the financial, business, and education policies and affairs of the University;
- The development and regular updating of an institutional master plan and compact with the Higher Education Policy Commission;
- The preparation of an annual budget request for the University that relates directly to the mission, goals, and projections as found in the institutional master plan and the institutional compact;
- The review, at least every five years, of all academic programs offered at the university;
- The approval of the teacher education programs offered at the University;
- The management of all personnel matters, including, but not limited to, classification, compensation, and discipline for employees of the University;
- The solicitation and utilization or expending voluntary support, including financial contributions and support services, for the University;
- The appointment and regular written evaluation of the president, subject to the approval of the Policy Commission;
- The entrance into contracts or consortium agreements with the public schools, private schools, or private industry to provide technical, vocational, college preparatory, remedial, and customized training courses; and
- The maintenance of an efficient and cost-effective system for the financial management and expenditure of appropriated and non-appropriated revenue.

The BoG provides oversight of University business through its regularly scheduled meetings and those of the Board committees. Through its bylaws and policies, the BoG issues administrative rules related to the control, supervision, and management of the financial, business, and education policies and affairs of the University. The legal obligations and responsibilities of the Board, as well as the criteria for Board membership, are detailed throughout this section.

The BoG holds a minimum of <u>six meetings in a fiscal year</u>, including an annual meeting each June, as well as periodic retreats and additional meetings as necessary. A recent example of this includes the <u>October 10th 2023 special meeting</u> related to Pre-audit 4th quarter budget and Academic Prioritization.

As it engages in the governance of the institution, the Shepherd BoG considers a variety of items, including the annual budget, financial audits, personnel changes, presidential evaluation and compensation, tuition and fees, residence and dining hall rates, emeritus faculty appointments, new degrees and programs, construction and repair of facilities, and honorary degrees. Many Board agenda items come from the President, who receives them from administrative divisions represented on the President's Executive Leadership Team, as well as from other internal bodies such as the Faculty Senate or the Student Government Association. Items brought before the Board encompass the operations of the entire institution, and the BoG considers these matters in the context of the full institution and its mission and priorities.

The <u>agenda for each Board meeting</u>, containing all supporting documents, is posted in advance on the <u>BoG website</u>, which also provides access to a list of BoG members, Bylaws, Meeting Schedule, Minutes, and Policies, as well as a direct link to the West Virginia Higher Education Policy Commission. In accordance with Article 2 of the BoG bylaws, agendas are prepared collaboratively by the President and BoG Chair. Any member of the BoG may present items at meetings, including those not on the agenda; however, no action can be taken on a non-emergency item not on the agenda. Article 8 of the Board bylaws details waiving of procedural rules to hear any person on any subject. Agenda items have been considered and vetted according to University policy prior to presentation to the BoG. For example, proposals for new degree programs are initiated at the departmental level, involving the department chair/school director and unit dean, and then proceed to the school and institutional Curriculum and Instruction Committee. The proposal is then reviewed by the Provost/VPAA and the President before being placed on the Board agenda. The Board is the final internal approval before moving on to any external approvals such as the West Virginia Higher Education Policy Commission (WV-HEPC), if applicable.

The President's Report at each BoG meeting contains information and updates on recent and upcoming events and accomplishments by students, faculty, and staff, as well as major initiatives undertaken by the institution, such as the development of new degree programs, budget concerns, capital projects, and efforts such as those focused on recruitment and retention. Regular reports from BoG committees and from members of the Executive Leadership Team keep the Board apprised of the state of the University. Guests such as students, faculty, and staff are recognized for their service or achievements in teaching, learning, or scholarship. Meetings are open to the public, with non-public business conducted in executive session after the conclusion of the public agenda.

Section 1 of <u>WV Code §18B-2A</u> indicates that the State of West Virginia is best served when the membership of each governing board includes the following:

- The academic expertise and institutional experience of faculty members and a student of the institution governed by the board;
- The technical or professional expertise and institutional experience of a classified employee of the institution governed by the board;
- An awareness and understanding of the issues facing the institution governed by the

board; and

- The diverse perspectives that arise from a membership that is balanced and representative of West Virginia and its citizens.

Shepherd has a twelve-person Board, whose members per WV Code §18B-2A-1 include nine lay members appointed by the Governor of West Virginia, one full-time faculty member elected by the faculty (non-voting), one student elected by the student body (non-voting), and one classified or non-classified staff member elected by the classified or non-classified staff (non-voting). The three officers of the Board are annually elected by the membership. The composition of the Board, including representatives of campus constituencies as well as external members, not only assures a wide range of representation, but allows the work of the Board to reflect and advance the interests of the institution as understood by both internal and external stakeholders, and ensures that items before the Board can be reviewed and decided on by a representative body able to consider and balance the interests and needs of those constituencies.

WV Code §18B-2A and the provisions of the <u>State Ethics Act</u> (6B- 1-1, *et seq.*) collectively establish the requirement that all Board members be committed to the advancement of institutional, rather than personal, interests. Members take an oath of office, serve without compensation, and are subject to the articles of law outlined in state code. Additionally, Article 14 of the Board's Bylaws details the authority of the Board to act as a whole and not as an individual. New Board members receive information from the Governor about the WV Ethics Act during the appointment process; Shepherd provides additional guidance on the Act.

WV Code §18B-2A, in addition to describing the composition of the Board, specifies the following regarding member selection and term limits:

- No more than five BoG lay members may be of the same political party; at least five must be residents of the state.
- Terms of service begin on July 1. Student member terms are for one year; faculty and classified staff terms are for two years. Faculty and staff members are able to succeed themselves for one additional term, not to exceed a total of four consecutive years. Appointed lay member terms are for four years, and lay members may succeed themselves for no more than one additional term. Lay members appointed to fill unexpired terms may succeed themselves for two full terms after completing an unexpired term.
- Each June, the BoG elects one of its lay members as chair. No chair may serve for more than four consecutive years.
- Except in the case of a vacancy, all elections are held and all appointments are made no later than June 30 preceding the commencement of the term. No BoG lay member is eligible for paid University employment.

These guidelines help to ensure that Board membership is of sufficiently diverse background and opinion to preclude excessive influence on Board proceedings by any individual, group or interest. Term limits help to prevent individuals from exerting long-term influence over the Board, and established processes for filling vacancies on the Board provide continuity of Board representation and function.

Each member of the BoG participates in an <u>orientation upon appointment</u> to the Board. New

Board members learn the role of the institutional governing board, its responsibilities, bylaws, and specific policies of the Board and the West Virginia Higher Education Policy Commission (WV-HEPC). The orientation also includes review of the organizational structure of the institution, planning documents (master plan and strategic plan), financial statements and budgets, and potential committee assignments within the BoG. Training and development for Board members occurs throughout the year and is also mandated in WV Code §18B-1D-9. A recent example was a Board Assessment focused on enhancing Board effectiveness that was facilitated by an outside consultant. The Board Assessment included a thorough self-assessment initiated in December 2023 and culminating in a full-day Board retreat on April 24, 2024. All BoG members except the student representative are required to participate in a minimum of six hours of continuing education every two years.

Each new and continuing Board member is also enrolled as a member of the Association of Governing Boards (AGB), which includes a subscription to *Trusteeship*, as well as access to the "AGB Knowledge Center," in-depth learning programs, and the National Conference on Trusteeship. In retreats and other sessions, Board members regularly review *Trusteeship* articles that highlight best practices for governing boards nationwide.

Regular meetings are usually preceded by several meetings of the following committees, which are described in more detail in in Article 7 of the Bylaws.

- Academic Programs and Enrollment Committee
- Finance and Facilities Committee
- Student Affairs, Athletics, and University Relations Committee

Each of the committees receives updates, reports, and action items from various academic and administrative units of the University. This is accomplished through the President and the Executive Leadership Team, through which all communications to and from the Board must pass. In addition, the BoG maintains the Executive Committee (composed of the three Board officers) and the Audit Committee as standing committees. The Nominations Committee is also assembled twice per year to evaluate and adopt a slate of officers for the next annual meeting, and to determine its own membership for the coming year.

These committees enable the Board to examine in depth the University's opportunities and challenges, and to perform its oversight duties, both within committees and fully assembled, in the best interests of the institution. Additionally, during the 2024-2025 term, the faculty representative to the Board (at that time a voting member) was charged with chairing the Academic Programs and Development Committee, ensuring that higher education experience and intimate knowledge of the University's programs would inform the conduct of this important committee. The Board conducts all of its business by vote of a majority of the members present, and it conducts selected business in executive session in accordance with the West Virginia Open Governmental Meetings Act .

Day-to-day management of the institution is delegated by the BoG to the President. The Board bylaws outline the specific responsibilities of the President as the "principal executive officer of the University", including authorization to "act on behalf of the Board" as allowed by law or regulation. Creation of top-level administrative positions and academic units is done by the President, but must be approved by the BoG.

Shepherd's institutional BoG has a long and consistent history of oversight and service. The

deliberations and decision-making process of the BoG reflect the priorities of the institution. The policies and the bylaws of the Board, as well as the minutes of its meetings, fully document that Shepherd's Board delegates day-to-day management of the institution to the administration and works within the organizational governance and reporting structure to allow the faculty and its representatives to oversee academic matters.

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- 2025-12-02_WV-Ethics-Act
- AGB Membership Benefits 20250506
- Board Assessment Program 20250506
- Board Self-Assessment Questions 20250506
- BoG Orientation Packet
- Lunch and Learn Invitation 20250506
- Open Governmental Meetings Act
- WVCode-§18B-1D-9

2.D. Academic Freedom and Freedom of Expression

The institution supports academic freedom and freedom of expression in the pursuit of knowledge as integral to high-quality teaching, learning and research.

Argument

Shepherd recognizes and acknowledges that academic freedom and freedom of expression are vital, indispensable, and inviolable parts of the academic enterprise. Through policies detailed in multiple documents ranging from the Board of Governors (BoG) Policies (discussed in Core Component 2C) to the Faculty Handbook and the Student Handbook. Shepherd ensures academic freedom is maintained and encouraged, in service of the University's educational mission.

These include the following:

- Academic freedom is part of BoG Policy 19, based on the authority of WV Code §18B-1-6 and §18B-2A-4.
- The University's Principles of Academic Freedom (found in the Faculty Handbook) state that Shepherd adheres to the principles of the American Association of University Professors, and emphasizes that "the common good depends upon the free search for truth and its free exposition." This text is also included in the Faculty Handbook.
- BoG Policy 19, which also addresses tenure, states that "tenure is designed to ensure academic freedom." Article IV of the Constitution of Shepherd University includes academic freedom as part of the areas of focus of the Faculty Senate.
- The Student Handbook discusses academic freedom and freedom of expression at both the undergraduate and graduate levels.
- The Code of Conduct for Clubs and Organizations states "one of the University's crucial goals is to promote the 'marketplace of ideas' via free speech," while abiding by "recognized legal limits."

These principles and policies outline the institution's commitment to academic freedom that is expected of all Shepherd employees and is supported through the instructional experience and through scholarly and creative activities.

Sources

- AAUP_1940_Statement
- Code-of-Conduct-for-Clubs-and-Organizations
- Graduate-Academic-Rights-and-Responsibilities
- Policy-19-2019
- Undergraduate-Academic-Rights-and-Responsibilities
- WVCode-_C2_A718B-2A-4
- WVCode-§18B-1-6
- CONSTITUTION-May-2025-1

2.E. Knowledge Acquisition, Discovery and Application

The institution adheres to policies and procedures that ensure responsible acquisition, discovery and application of knowledge.

Argument

Shepherd University provides thorough oversight of research and scholarly practices by students, faculty, and staff. Expectations regarding ethical research practices are outlined in the Research Integrity Policy and the Institutional Research Board (IRB) and Institutional Animal Care and Use Committee (IACUC) policy manuals. The Student Handbook section on Community Expectations contains the following text:

Our community must possess the highest standards of ethical, educational, and social integrity, combined with recognition and mutual respect for those diversities, which will enrich and inform our intellectual and social lives. Our community standards of behavior are intended to enhance and protect the University's general educational process, including research and public service activities, as well as promote personal academic advancement and maturation.

Multiple internal entities and policies encourage and support professional and ethical research.

Human and Animal Subjects Research Boards

Shepherd's Institutional Review Board (IRB) ensures that the health, well-being, and rights of human subjects are protected in ethical research by members of the Shepherd community. All research involving human subjects must come before the IRB. Similarly, students and faculty conducting research involving animal subjects must submit a proposal to the University's Institutional Animal Care and Use Committee (IACUC) for guidance and approval. All proposals require proof of completion of an authorized training course by the project's primary investigator.

Both committees, through independent processes, approve or reject research proposals based on whether or not research subjects are adequately protected. These two committees operate in accordance with the relevant federal guidelines.

Shepherd University Research Integrity Policy

This policy contains the common definitions regarding ethical research and misconduct in research and research-related activities. Procedures for filing complaints and disciplinary procedures for any individuals or groups engaging in misconduct in research are provided. This policy and associated procedures will be followed when an allegation of possible misconduct in scholarly research activities is received by an institutional official.

Faculty Conflict of Interest in Research Policy

As research activities may potentially intersect with business and industry, it is crucial that potential or perceived conflicts of interest are avoided. In addition to ensuring compliance with National Science Foundation (NSF) and Public Health Service (PHS) policies, this policy is designed to safeguard the integrity of sponsored research at Shepherd by identifying and either managing or eliminating the risks to research integrity resulting from a conflict of interest.

Intellectual Property Policy

Shepherd recognizes that, while the main objective of professional development is not to generate intellectual property, if a valuable intellectual property interest develops from such activity, it is in everyone's best interest to define its ownership interests in advance. This policy is intended to encourage professional development that is in the best interests of the public, funding agency, the University and the faculty member while also allowing for the protection and disclosure of intellectual property developed by faculty and/or staff at the University.

Grant Oversight

The Office of Sponsored Programs (OSP) provides support for Shepherd's rapidly growing culture of grant activity from prospecting to implementation and closure, as well as opportunities for skills training and other activities.

Grant applications and activity receive oversight from the appropriate bodies. All proposals submitted on behalf of the University require pre-submission review and written approval from the Provost/VPAA, Director of Finance, Dean or VP of the PI/PD and the Director for the Office of Sponsored Programs (DOSP). All other relevant supervisors and stakeholders receive timely notification of the proposal and may review and request clarification or changes. Record of notification and approval is documented in a routing sheet. Standard award contracts for successful grants are reviewed by the DOSP and Grants Accountant before being reviewed and signed by the CFO, Assistant CFO and/or DOSP. Non-standard awards undergo additional review by General Counsel. Grant budgets are monitored by the Grants Accountant, and expenses are reviewed by Procurement and the Grants Accountant before billing. At the end of the grant period, the Grants Accountant performs a final reconciliation and review, returns any unspent funds (deferred revenue only), and completes any required financial reports.

Research Ethics

Student capstones are required to satisfy the Ethical Practice and Ethical Reasoning Core Curriculum Competency. Research projects conducted as part of these capstones provide an opportunity to explore research ethics in an applied setting. The process of application for IRB or IACUC approval for research (see above) requires applicants to evaluate the ethical implications of their research projects, and results in projects with both ethical and research integrity.

Ruth Scarborough Library

Library resources and tools for research include a number of electronic resources/databases, search tools, and research guides in a variety of subject areas. There are also guides related to using the search tools, electronic resources, and information on

plagiarism (academic integrity) and copyright law. These materials are also available for use by faculty in the classroom. Librarian liaisons to academic colleges are available for guidance in the use of information and research tools.

Staff offer general instruction and tutorials in research, as well as instruction geared to specific courses. Library faculty teach <u>information literacy classes</u> to students such as LBSC 103 Information Literacy for the Social Sciences and LBSC 300 Digital Information Literacy. These are designed to facilitate understanding of the resources and services that the library offers, and to aid students in developing tools for management and ethical use of information gathered online.

Academic Support Center

The <u>Academic Support Center</u> provides a webpage of student resources, including links to material regarding plagiarism avoid, proper citation methodology, and examples for structuring papers and reports.

Information Literacy

Information literacy is a sub-goal of Goal 2 of the LEAP standards from the American Association of Colleges & Universities, as adopted by Shepherd as part of its Core Curriculum Framework. Information literacy is defined as "the ability to know when there is a need for information, to be able to identify, locate, evaluate, and effectively and responsibly use and share that information for the problem at hand." As part of Shepherd's Core Curriculum, First-Year Experience (FYEX) courses address information literacy as one of the three competencies of these classes, which are required of all entering baccalaureate students. As described above, the Library offers instruction in information literacy as well.

Use of information technology and the administration and security of information is governed by policies in the following documents:

- <u>BoG Policy 35</u>: Information Technology Security, in adherence with West Virginia Code §18B-1-6.
- The <u>Faculty Handbook</u>, section 2.E.2.
- The Student Code of Conduct is provided in the <u>Student Handbook</u>. This outlines the penalty for computer and user account misuse.
- The University's <u>Acceptable Use Policy</u> for computers and user accounts is posted on the IT Services Policies and Procedures webpage.

Students, faculty, and staff are informed of Shepherd's academic integrity policies and procedures in multiple venues. These policies are enforced through processes that discourage and prevent infractions of policy and monitor for and penalize violations.

Faculty, Staff, Students

Ethical behavior and use of information is a common thread that runs through Shepherd's <u>Core Curriculum</u> LEAP outcomes, and in other academic program curricula. Details regarding ethics instruction in a variety of disciplines are included in the sampling of courses and programs which explicitly train students in ethics. Some representative examples include the following:

- There are <u>more than 25 undergraduate courses with ethics at their core</u> across multiple disciplines, in areas as diverse as biology, communication, political science, and journalism.
- Individual <u>program handbooks</u> detail consequences of violation of ethical and integrity standards.
    - The <u>Teacher Education</u> program expects students to perform with the highest ethical behavior toward children, peers, and supervisors. Faculty members incorporate moral and ethical criteria in assessing the outcomes of teaching/learning and evaluating student dispositions as part of program admission and continuance.
    - The School of <u>Nursing</u> provides each student with a copy ofits Student Handbook (available online) which outlines professional standards of behavior and the consequences of failing to adhere to these standards. This handbook also includes the American Nurses Association Code of Ethics.
    - The <u>Social Work</u> Program Student Handbook lists values and ethics as essential requirements of the social work content and curriculum areas, and continuously emphasizes the importance of ethical work and conduct in the discipline.

- The <u>Student Handbook</u> contains policy statements for undergraduates and for graduate students. Both statements cover academic actions imposed by the University on violation of academic policy or failure to maintain University academic standards.
- The <u>Faculty Handbook</u> addresses the responsibilities and expectations of University faculty, including actions to be taken upon violation of University policy. This information is largely derived from BoG Policy 19, which speaks to academic freedom and professional responsibility, as well as detailing circumstances in which faculty may be dismissed or terminated.
- Similarly, the <u>Staff Handbook</u> includes information about employee situations and actions that can result in disciplinary sanctions, as well as a section explaining the processes used for such sanctions.
- <u>Counseling Services</u> provides outreach programming in accordance with our mission to promote wellness, normalize mental health challenges, reduce risk and stigma, increase awareness of on and off campus resources, and encourage help-seeking. Outreach programming includes classroom presentations, training for students, staff and faculty, consultation, and special events. During Orientation, formal discussions outlining expectations in the Student Code of Conduct target students and parents in sessions before each advising and registration session.

Oversight over these policies and the appeals process is a collaboration between Student Affairs and Academic Affairs. The Provost/VPAA maintains final appeal authority regarding all issues of academic dishonesty.

Sources

- OSP Policies Procedures
- Ethics Catalog Search
- conflict-policy
- Core-Competency-Mapping_UPDATED-12.6.2024
- intellectual-policy

- research-policy
- Shepherd _ Institutional Animal Care and Use Committee
- Shepherd _Institutional Review Board
- CounselingServices_FY25 Annual Report
- LBSC Courses
- Library Research
- Nursing UG Handbook
- policy35
- Program Handbooks
- Shepherd University _ Academic Support Center
- Social-Work-Handbook-2025
- UserPolicy
- EPP-Student-Handbook-2022-v3

Criterion 2 - Summary

In fulfilling its mission, the institution acts with integrity; its conduct is ethical and responsible.

Argument

Shepherd embraces integrity as a cornerstone of its operations, and maintains a strong sense of integrity and ethics while balancing the needs of its diverse stakeholders. Transparency and honesty in statement and action guide all aspects of institutional function, as does compliance with external laws and guidelines. These guiding principles are clearly evidenced in information provided to the public relating to University operations.

The Board of Governors (BoG) oversees the University per state law and guidelines, while delegating day-to-day managerial operations to University administration, faculty, and staff. The BoG functions in an ethical manner with regard to trustee expectations, fiduciary responsibilities, and other BoG business, always working toward the betterment of the University. BoG policies and procedures ensure integrity and transparency in BoG processes, and information on BoG business is provided to the public through its website.

Shepherd's commitment to ethical action is woven into the institutional culture. Students learn the importance of academic integrity, ethical behavior in and outside the classroom, and effective and principled discovery and application of knowledge and information in scholarly and professional contexts. Institutional processes and standards for faculty and staff define and guide academic and professional behavior, demonstrate the University's commitment to academic freedom, and support an ethical and responsible scholarly research enterprise.

These practices create an environment guided by ethical and responsible conduct and dedicated to teaching, learning, the pursuit of knowledge, and the development of ethical and responsible behavior in the individual.

Sources

There are no sources.

3 - Teaching and Learning for Student Success

The institution demonstrates responsibility for the quality of its educational programs, learning environments and support services, and it evaluates their effectiveness in fulfilling its mission. The rigor and quality of each educational program is consistent regardless of modality, location or other differentiating factors.

3.A. Educational Programs

The institution maintains learning goals and outcomes that reflect a level of rigor commensurate with college-level work, including by program level and the content of each of its educational programs.

Argument

Introduction

Shepherd prides itself on "preparing students for lifelong learning and success." The University's core value of "learning" emphasizes the integration of "scholarship, critical thinking, and curiosity" as integral to meaningful contributions, while the core value of "engagement" promotes "critical analysis, intercultural competence, and self-expression" as important tools in coursework and experiential learning. Talented and highly skilled faculty and staff deliver instruction within Shepherd's academic programs and create challenging yet accessible curricula. Shepherd's continued commitment to excellence in teaching and learning is reflected in planning documents, policies, resources, support, and evaluations, and by rewarding excellence in teaching, scholarship, advisement, and service.

Shepherd courses and programs are constructed and maintained by the faculty and appropriate staff following prescribed procedures, and are upgraded as necessary to ensure that content is comprehensive and up to date. Any changes to curricula, including prerequisite changes, must be approved by the appropriate department/school, college, and finally the Curriculum and Instruction Committee. A final review by the Core Curriculum Committee may be necessary if the altered course is an option in the Core Curriculum. Approval for curricular changes follows a similar process at the graduate level, with approvals by the appropriate academic department/school sent before final approval by the Graduate Council.

Shepherd has adopted the Association of American Colleges and Universities' Liberal Education and America's Promise (LEAP) outcomes and has been discussing the use of their Valid Assessment of Learning in Undergraduate Education (VALUE) rubrics. Courses in the undergraduate Core Curriculum are designed and assessed on these learning outcomes. Learning goals are reviewed for suitability and rigor when proposed to the Core Curriculum Committee.

Within the undergraduate Core Curriculum and across all disciplinary programs, courses are differentiated by numbers (100-400) that represent the expected level of performance. The Core Curriculum has three tiers, as explained in Core Component 3B. Upper-division courses (300- and 400-level courses) are mostly concentrated within academic majors. The University Catalog outlines core outcomes tied to LEAP goals, as well as University goals for the Core Curriculum.

Graduate courses are also differentiated by numbers (500-699), indicating the expected level of performance. The Catalog describes the differentiated purposes of graduate programs; each graduate degree outlines its unique objectives, while demonstrating how graduate programs build on their parallel undergraduate majors. The accelerated (4+1) programs for undergraduate students take advantage of this continuity; these programs allow use of up to four graduate courses to meet undergraduate degree requirements. Shepherd currently has pathways leading to an MBA, MA in Appalachian Studies and several disciplines leading to an MAT and teacher certification. Outcomes at the undergraduate level provide a foundation for further enhancement, refinement, and progression at the graduate level, as demonstrated by the progression of learning outcomes between the Business Administration major and the M.B.A.

In a few circumstances, an undergraduate course may be cross-listed with a graduate course, such as Education pedagogy courses and courses for accelerated degree programs. The graduate course includes the content of the undergraduate course, and will generally not only have more work, but more in-depth work at the graduate level. Such cross-listing must be approved in advance by the College Dean and Provost.

Certificate programs at both the graduate and undergraduate levels are comprised of courses within disciplinary majors and minors that are assessed for appropriateness.

Courses in the major have learning outcomes specific to each academic discipline. These goals are reviewed by departments/schools and colleges before final approval is sought from the Curriculum and Instruction Committee and Core Curriculum Committee (as necessary). Learning outcomes for individual courses are listed on syllabi. Ongoing course review in the curriculum is handled at the program or department level. Program-wide learning goals, such as those for the Social Work B.S.W., provide clear information on objectives and intended outcomes for the program at different levels. Different sets of learning goals are defined appropriately to the program level. For example, the School of Nursing defines one set of goals for the B.S.N. program, and a more advanced set for the Doctor of Nursing Practice (DNP), and the Department of Business, Accounting, Economics, and Finance defines one set for the Business Administration B.S. and a more advanced set for the MBA. In addition, all syllabi are reviewed within the appropriate academic units at the start of each semester to ensure compliance with federal and University requirements as well as consistency in goals and outcomes between sections of the same course. The Center for Faculty Excellence provides a syllabus template that outlines the various requirements.

Support for course development and provision is provided by Shepherd's instructional designer and instructional technologist. The instructional designer supports both full-time and adjunct faculty with implementation of best practices and enhancing online course delivery for all modalities: online asynchronous (OLA), online synchronous (OLS), hybrid asynchronous (HYA), hybrid synchronous (HYS), and HyFlex (HYF), as well as for

face-to-face (F2F) instructors who use online components for courses. The instructional technologist provides complementary and collaborative training on the many tools available in the learning management system and Microsoft suite. These individuals provide one-on-one guidance and group training, addressing the effective use of Shepherd's learning management system (Brightspace) and its many tools. Standardized OLA and OLS course templates have been adopted to provide a consistent course format for enhancing students' learning success in these modalities.

Shepherd's policies and procedures regarding transfer and awarding of credits are designed to maintain integrity and rigor. The WV Higher Education Policy Commission has established a general studies and course equivalency transfer agreement for use within the state. In addition, Shepherd has articulation agreements with over twenty state and regional institutions. Each agreement's equivalencies have been vetted by appropriate department chairs and the Office of the Registrar. These articulation agreements have helped chairs, directors, and deans (in collaboration with community college partners) to develop a number of transfer agreements.

Courses without established and/or evident equivalencies are reviewed by the appropriate department chair for credit; evidence such as course syllabi may be requested and reviewed. Credit for prior learning and transfer of credit is awarded per catalog policies, and may be awarded based on examinations (Advanced Placement, International Baccalaureate, CLEP, or specialized programmatic exams); assessment of prior learning by portfolio or for military service; and /or limits and policies regarding transfer of credit prior to and after admission. Students in the Regents Bachelor of Arts, a program without majors or minors, receive a comprehensive evaluation of past experiential learning by the RBA Coordinator and the appropriate department chair for earned credit. In rare situations and with the recommendation of a department chair and instructor, students may be permitted to take a special examination for credit.

Policies regarding transfer credit into graduate programs are detailed in the catalog and in the Faculty Handbook.

Rigorous standards are also maintained for enrolled students wishing to take courses at another institution. Students must seek prior approval and be in good academic standing and must not have unsuccessfully attempted the course; this oversight ensures that coursework will be taken at an accredited institution and will articulate. A maximum of seventy-two transfer credits from two-year colleges can be used toward graduation requirements. Up to twenty-eight semester hours of correspondence work completed at accredited institutions that cooperate with the Armed Forces Institute is accepted by universities in West Virginia.

High-school students meeting certain GPA and ACT/SAT score standards may apply for special dual enrollment admission to take freshman-level coursework. As discussed in Core Component 3C, dual enrollment students take the same classes, are taught by the same instructors, and are subject to the same syllabi, grading, and course policies as baccalaureate-level students; often, dual enrollment students are in class sections with baccalaureate-level students. Thus, dual enrollment students receive the same education and are held to the same standards as baccalaureate-level students in the same classes.

Sources

- Shepherd Mission And Vision Statement
- 2025-2026 Core Curriculum Worksheet
- AACU_Value_Rubrics
- Accelarated (4+1) Graduate Degrees
- Accelerated (4+1) MBA program brochure
- CCC_Guidelines-for-Core-Curriculum-2024-2025
- Core Curriculum
- Curriculum & Instruction Committee
- Liberal Arts Experience_LEAP
- Core Curriculum Framework
- BSN Program Outcomes
- Course Modality Definitions
- DNP Program Outcomes
- Faculty Professional Development Calendar
- General-Studies-and-Course-Equivalency-Transfer-Agreement-2024
- Learning Manage System (LMS) - Resources
- SW Program Outcomes
- Syllabus_Template
- Liberal Arts Experience - LEAP

3.B. Exercise of Intellectual Inquiry

The institution's educational programs engage students in collecting, analyzing and communicating information; in practicing modes of intellectual inquiry or creative work; and in developing skills adaptable to changing environments.

Argument

Shepherd's commitment to its mission of education is realized via a curriculum that values the discovery, acquisition, and application of knowledge beneficial to society. The general education program, the Core Curriculum, is tied to the Association of American Colleges and Universities' Liberal Education and America's Promise (LEAP) Essential Learning Outcomes (ELO). The Core Curriculum has four goals:

- Knowledge of human cultures and the physical and natural world
- Intellectual and practical skills throughout the curriculum
- Personal and social responsibility
- Integrative learning

The Core Curriculum "prepares students for lifelong learning and success in their chosen pursuits" and "position[s] our diverse community of students and alumni for success as global citizens and leaders." Oversight is provided by the Core Curriculum Committee, a constitutional committee which reports to the Faculty Senate.

The Core Curriculum and its competencies cover the wide range of student development defined by the LEAP/Essential Learning Outcomes as "the knowledge and skills gained from a liberal education," so that students can "prepare for twenty-first-century challenges." Core Curriculum competencies are organized into three tiers: Tier One (initial inquiry), Tier Two (expression of knowledge), and Tier Three (integrative learning). Tier One coursework includes the First-Year Experience, math, written English, science, and history courses. Students have opportunities to explore interests in the arts, humanities, and social sciences courses that are required components of Tier Two. An intensive writing in the major course and a capstone fosters integrated learning in Tier Three. Core Curriculum courses work together to ensure breadth and depth of education in both knowledge and ability.

A minimum of 42 semester hours of Core Curriculum work is required for all bachelor's degrees (except for the Regents Bachelor of Arts). Undergraduate majors align with the Core Curriculum to provide educational programs that provide instruction in the discipline while developing a broad range of knowledge and skills both inside and outside of the discipline. Each Core Curriculum course is assigned one or more core codes, which indicate Core Curriculum competencies developed by that course. In addition, Shepherd's course syllabus template includes information on the LEAP/ELO competencies developed by that course. This information ties course learning directly to the LEAP/ELO and Core Curriculum frameworks in a way that is visible to students.

Shepherd's curricula reflect the University's commitment to "critical analysis" and "intercultural competence" (per the University's core value of Engagement). Undergraduates

can major or minor in programs such as Appalachian Studies, Global Studies, History, Sociology, or Political Science. Other minors include Aging Studies, Crime and Society, and Gender and Women's Studies. Coursework within the arts, humanities, ansocial sciences emphasizes "global understanding and respect" and "multiculturalism and diversity," with students required to take instruction in these competencies in Tier Two of the Core Curriculum.

Across the University, departments offer <u>experiential education components</u> and faculty-led short-term study abroad programs often connected with specific course content. Extracurricular opportunities and experiential activities within courses enhance students' "<u>success as global citizens and leaders</u>." The University capitalizes on its proximity to Washington, DC and Baltimore, MD to offer an array of academic, cultural, and social programs. This wide range of opportunities enables students to experience intellectual inquiry, research, and cultural exposure in varied settings. The variety of student learners from many backgrounds and localities brings talents, abilities, and interests to the campus which aid in development of intercultural competence and acceptance.

Multiple units at Shepherd provide students with opportunities to engage with people and their cultures in other parts of West Virginia and other countries.

- Shepherd maintains <u>international partnership agreements</u> with institutions in Germany, Japan, Mexico, Scotland, Switzerland, Taiwan, and, beginning in Academic Year (AY) 25-26, Italy. Over the past three years, students have engaged in exchanges at four of these partner institutions. <u>Study abroad</u> participation has remained strong, with 14 students in AY 22-23 and 10 in AY 23-24 taking part in individual programs across countries such as Germany, Japan, Scotland, Italy, and Argentina. An additional 12 students participated in AY 24-25, including 4 students participating on exchanges in Germany, Japan, and Mexico, and 8 students on direct enroll or third party programs in Costa Rica, Mexico, Morocco, Korea, Japan, Norway, the United Kingdom, and the Semester at Sea program. 8 students have participated in study abroad in Fall, Winter, and Spring AY 25-26, including exchanges to Germany, Italy, and Switzerland, as well as third party programs in Japan, Spain, and multi-country programs in Europe. Summer numbers remain to be confirmed as of early February, 2026. Faculty-led trips have also generally been popular, involving 19 students in four trips in AY 22-23 and 61 students in five trips in AY 23-24. Only one trip with 5 students took place in AY 24-25, as staffing and logistics reduced available offerings. Three faculty-led trips (to Costa Rica, Europe (multi-country), and the United Kingdom are confirmed for summer 26, with a fourth trip to Germany under consideration. Shepherd received a $7,000 grant from the WV HEPC in April 2025 to support study abroad, including scholarship funding for students as well support for Director travel to partners in spring 2026, with the aim of increasing exchange participation. Additionally, from fall 2021 to winter 2025, ten Pell Grant recipients received Gilman Scholarships to help fund their study abroad experiences.
- In spring 2025, Shepherd University was officially accepted as a <u>Peace Corps Prep site</u>. This Peace Corps Prep program is a nationally recognized partnership that prepares undergraduate students for international service through coursework, hands-on experience, and professional development. Shepherd will focus on building and launching the program, creating exciting new opportunities for students to engage in global service and leadership development.
- For more than two decades, Shepherd's annual <u>Alternative Spring Break</u> program has

provided opportunities for students to spend their Spring Break in direct service to others. Students spend a week in residence working with agencies that focus on revitalizing and rebuilding communities within West Virginia and Appalachia. University staff introduce the Social Change Model of Leadership and then lead daily reflection activities. Students can receive academic credit through a practicum course in Shepherd's Appalachian Studies program.

Research or creative activities are components of all programs of study at Shepherd. Within the arts and sciences, students participate in studio and/or laboratory-based courses that provide them with the skills, practice, habits of mind, and discipline needed to apply theory to practice. These activities provide students with unique opportunities that prepare them for future careers and enhance their understanding of opportunities and challenges inherent in their fields. Shepherd's active research and grantsmanship culture has resulted in an active grant portfolio with a projected FY26 revenue for active and closed grants to be over $12 million. At the undergraduate level, faculty and students creatively develop and contribute to research projects, often in a collaborative manner. Students conducting research receive training in safety practices in accordance with federal guidelines; for example, the safety technician in the College of Science, Technology, Engineering, Mathematics, and Nursing is responsible for student lab access and training. Capstone projects provide integrative and applied learning per LEAP outcomes. Capstones and other research conducted by Shepherd undergraduate students are presented via exhibitions, recitals, and internal and external research forums. Sans Merci is a student-run creative magazine that highlights the writing and visual arts of Shepherd University students. Graduate student capstones, action research projects, nursing practice projects, and other culminating experiences demonstrate integration of knowledge and experience in the discipline.

Advisory boards, such as those associated with professional programs such as Nursing, Business, Education, and Social Work, provide valuable feedback on many areas, including perceptions of Shepherd's graduates by area employers. Programs stay in touch with graduates via social media, provide advisement and guidance for potential graduate programs, and write recommendation letters for students wishing to pursue advanced study. These efforts enable programs to remain responsive to the needs of their graduates and their communities.

The National Survey of Student Engagement (2025) indicates that, overall, students report fewer instances of use of some instructional practices. Freshmen interact with their peers less in class, read less, and generally spend less time on their coursework, but appreciate the instruction and resources they receive to improve the clarity and effectiveness of their writing. Seniors receive fewer examples and less feedback and analyze information less often. Both groups write less. However, seniors perform better than freshmen on some measures, interacting more with classmates in class and with faculty outside of class. Participation in culminating senior experiences is high (as many programs require these), and seniors also discuss course material with faculty and work with faculty on research and non-coursework activities more. However, seniors are less satisfied with their development after their time at Shepherd; while they are happy with improvements to their speaking and work-related and teamwork skills, they report dissatisfaction with their skills in critical thinking, numerical analysis, solving complex real-world problems, developing values and ethics, and citizenry. We acknowledge this difficulty and are redoubling our efforts within programs to address these issues through experiential learning opportunities and broadening interdisciplinary dialogues.

Sources

- Core Curriculum - catalog
- CONSTITUTION-May-2025-1
- Core Curriculum Framework- Updated Feb23
- Core Curriculum Mapping
- Core Curriculum
- Experiential Education Spring 2025 Survey Report
- Liberal Arts Experience_LEAP
- Senate-Bylaws-2024
- Shepherd Mission And Vision Statement
- Study Abroad Institutional Partnerships
- Study Abroad
- Syllabus_Template
- 0-June25-BOG-pkt-Electronic
- Alternative Spring Break
- CSTEM_Student_Access_and_Safety_Training
- NSSE25 Combined Reports
- OSP BoG Report Dec 2025
- PEACE CORPS PREP PROPOSAL
- Sans Merci

3.C. Sufficiency of Faculty and Staff

The institution has the faculty and staff needed for effective, high-quality programs and student services.

Argument

Between fall 2021 and fall 2025, Shepherd has maintained an average FTE student-to-FTE faculty ratio of 13.6:1. This ratio allows for smaller classes and more personalized instruction, while still providing sufficient faculty to teach classes necessary for program completion. Faculty instructional and workload data are regularly analyzed and evaluated to ensure that sufficient instructional capacity is available. In Fall 2025, Shepherd University employed 111 full-time instructional faculty. 69 (62.2%) were tenured, 27 (24.3%) were tenure-track, and 15 (13.5%) were term faculty (lecturers, clinical faculty, or visiting faculty). 100 (90.1%) held terminal degrees in their disciplines.

Continuity of faculty fosters consistency in processes and ongoing student engagement. The average years of service by full-time instructional faculty is 11.2 years, with an annual average turnover rate of 12% from FY15 through FY25. The current strategic plan (2023-2028) recognizes the importance of providing Shepherd employees with compensation, benefits, and opportunities for professional development and growth that attract and keep quality employees, both faculty and staff. Faculty professional development provides students with instructors and advisors who are current in their disciplines and can both ensure that curricula are kept up to date and provide current career and professional development advice.

The process by which new faculty and staff are hired is codified in the Faculty and Staff Search Manual, with supplemental material for faculty positions in the Faculty Handbook. Full-time faculty position descriptions are written by the academic department, in consultation with the college dean. All positions include possible need to teach online, evening, and graduate courses. All positions are brought to the Academic Affairs leadership team who approves the line and then to the subcommittee of the President's Executive Leadership Team (ELT) for final approval. Once approved, position descriptions are reviewed by the Office of Human Resources to ensure compliance with nondiscrimination laws. Credentials of applicants are verified during a competitive interview process, and the final hiring decision is approved by the Provost.   The successful applicant must agree to a background check and provide transcripts to confirm the highest degree earned.

Faculty qualifications are outlined in the Faculty Handbook. Full-time, tenure-track positions require a terminal degree in the field. Exceptions for these positions are occasionally made, with the contracted requirement of completing the terminal degree within a specific period. Full-time lecturers and clinical faculty may only have a master's degree, dependent on the scope of those unique positions. While a master's degree in the teaching field is the general minimal requirement for these positions, faculty without the terminal degree typically teach lower-level courses (i.e., 100- and 200-level). The annually updated list of faculty in the course catalog documents the credentialing of full-time faculty, as evidence of their

qualifications in their fields.

Hiring criteria for faculty remain the same regardless of teaching location or level of courses taught. Dual enrollment students take classes with baccalaureate students and are taught by the same faculty who teach baccalaureate-level courses; this requirement ensures a consistency of course material and level of challenge for all students. Shepherd has no contractual or consortia arrangements for dual enrollment students. Accrediting bodies such as the International Assembly for Collegiate Business Education (IACBE) and the Council for the Accreditation of Educator Preparation (CAEP) require institutions to report on specific academic qualifications for both full-time and part-time instructors, requiring evidence of coursework in instructional areas, further ensuring that instructors are qualified and capable of providing quality instruction.

Student evaluations of teaching are conducted for all courses each term, including summers, via Anthology Evaluate. Students rate course organization, materials, and instruction via twenty-three multiple-choice questions, and may provide additional written comments. Results are presented in summary format. The Associate Provost for Faculty Affairs, in conjunction with the college dean and/or department chair/school director, identifies individual faculty whose student evaluations suggest instructional or organizational difficulties. The Associate Provost also reviews evaluations for any issues related to incivility, bullying, other non-teaching concerns in addition to instructional concerns, and to determine trends or issues that are then reported to the college deans and the Provost/VPAA. Based on these results, the faculty member may receive further monitoring, or the college dean may require, recommend, or offer a structured series of corrective steps, including various forms of professional development. Faculty members are also directed to resources for instructors provided by the Center for Faculty Excellence.

The Faculty Handbook requires that, "in addition to an assigned teaching load, each professor is expected to schedule a minimum of six (6) office hours per week for student consultation." Office hours and contact information are on course syllabi, and students are encouraged to seek assistance when needed. Full-time faculty serve as academic advisors and assist students with scheduling classes, meeting program requirements, and preparing for graduation; they are also actively involved in curriculum development, service to the University and community, and assessment of student learning. Faculty can be reached via telephone, email, and online meeting technology. Faculty generally interact with students in labs, studios, clubs and organizations, and field experiences well beyond the requisite number of office hours. The National Survey of Student Engagement (2025) indicates that students, particularly seniors, continue to find Shepherd's faculty to be very accessible. Seniors discuss course material, academic performance, and career plans with faculty outside of class, and work with faculty on research projects more than those at other institutions. However, both freshmen and seniors report lower-than-average use of examples and provision of feedback in class; fewer freshmen present in class, and seniors find that teaching methods don't always align with their preferred learning styles. Freshmen report that the institution doesn't emphasize spending time on academic work, which may be translating into lower reported amounts of time spent; this may also be affected by higher-than-average time spent working off campus to obtain financial support.

The guidelines for promotion and tenure of full-time instructional faculty in the Faculty Handbook state that "to fulfill the charge of the Shepherd University mission it is necessary to establish a procedural system of high standards to maintain and evaluate continuously

the faculty of Shepherd University for the purpose of promotion and tenure." Third year pre-tenure reviews, sixth year tenure reviews, and promotion reviews all follow a parallel structure. The faculty member completes an online application portfolio using Interfolio, following guidelines in the Faculty Handbook which delineate specific criteria for each review. Each academic unit has a committee of tenured faculty who perform reviews for faculty in their respective units. After unit review of the portfolio, the college's Promotion and Tenure Committee reviews the applicant's portfolio and the unit recommendation. The Committee's recommendation is sent to the College Dean, who then submits a recommendation to the Provost/VPAA. The Provost/VPAA notifies the faculty member of the outcome of the process; depending on the specific process, an applicant may appeal this decision to the President.

Faculty evaluations ensure that they are appropriately qualified for instruction in their area, and that the instruction provided is of quality. Non-tenured faculty are evaluated annually and expected to stay current in their fields; this currency informs educational content. Tenured faculty are evaluated every two years with the same expectations surrounding currency. Self-evaluation and annual and periodic evaluations by peer and administrative personnel contribute to the effective teaching and continuous improvement of Shepherd faculty, as articulated in Board of Governors (BoG) Policy 19. These include the submission of an annual report of professional activity (i.e., teaching, service to the University, and professional development), teaching observations (each year for tenure-track faculty, every fourth year for tenured faculty) and a statement of goals for the next academic year. As part of the annual review process, faculty may apply for an annual merit award based on instructional performance, professional/institutional service, and professional development. Faculty peers review applications and submit recommendations to the Provost/VPAA for approval.

Full-time faculty receive an annual allotment of funds for professional development activity; this is typically $625, subject to budgetary constraints. Professional development opportunities available through the Faculty Senate include sabbatical leave, course release/reassignment time, mini-grants, summer professional development stipend grants, and Create the Future funds for international research or conference presentations. These awards are reviewed by the Professional Development Committee, with recommendations made to the Provost/VPAA for distribution. The Shepherd University Foundation also sponsors awards from Faculty Excellence Endowments through the President's office.

The Center for Faculty Excellence (CFE) provides a diverse optional training curriculum during the fall and spring semesters; the curriculum includes presentations on various aspects of teaching and learning, online instruction, new technology, and student issues and services. In August 2024, Shepherd instituted a required professional development day for all full-time faculty. The 2025 event expanded the audience to include any adjunct faculty who wanted to attend.

Shepherd's extensive training and orientation for new faculty includes:

- The full-time faculty orientation is a mix of a prescriptive curriculum during the Faculty Professional Development Day and workshop to cover other topics and to answer questions.
- New Faculty Learning Communities (NFLC) meet monthly to offer full-time faculty members advice and guidance to foster success during their first and second years at

Shepherd. First-year faculty members come together in NFLC 101 and second-year faculty members continue their participation in NFLC 102; the Director of Teaching and Learning leads both groups. Sessions may feature a guest speaker who provides information on topics such as effective teaching, academic support services, advising, scholarship, technological resources, and promotion and tenure.

- The CFE provides new adjunct faculty with the opportunity to attend an intensive training workshop that addresses specific needs and issues facing part-time faculty.

Faculty Affairs provides resources and information to achieve and maintain professional excellence and encourage innovation. These include tools to recruit and retain talented faculty and to create and maintain safe and productive working environments; assistance with the merit and promotion and tenure processes; training for chairs and deans; and professional development experiences related to faculty bullying, customer service, and Outlook training. The office also coordinates student course evaluations, academic leadership evaluations by faculty, annual review of the Faculty Handbook, and faculty recognition and awards.

Exceptional faculty are recognized via awards. Full-time, tenure-track faculty members are selected for awards recognizing outstanding teaching, service, advising, and scholarship, as well as for the Storer College Award for integrating belonging within the curriculum and the Mentzer Award for Inspirational Teaching. Part-time faculty awards honor excellent instruction and commitment to the community. At the graduate level, the Douglas C. Smith Distinguished Graduate Faculty Award honors a full- or part-time faculty member. These awards include funding for professional development. Shepherd University also participates annually in the West Virginia Professor of the Year Award. Shepherd faculty have received this award in past years; the University has had 3 finalists since 2021.

Staff are evaluated on an annual cycle (see Core Component 4B). Staff professional development is also strong. Professional staff maintain excellent involvement with their professional organizations. Financial Aid personnel are engaged with the National Association of Student Financial Aid Administrators (NASFAA) and the Associate Director is credentialed through NASFAA. Student Affairs personnel regularly participate in professional development opportunities from multiple higher education professional organizations including the National Association for Behavioral Intervention and Threat Assessment (NABITA), the Association of Title IX Administrators (ATIXA), Association of College and University Housing Officers – International (ACUHO-I) , Mid-Atlantic Association of College and University Housing Officers (MACUHO; regional organization of ACUHO-I), American Higher Education Development (AHED), National Organization for Student Success, (NOSS), and American College Health Association (ACHA) among others.

Shepherd celebrates having talented and highly qualified student support services personnel. Staff in Student Academic Enrichment screen qualified students to provide discipline-specific and writing tutoring and solicit recommendations for discipline-specific student tutors from faculty. Professional advisors and coaches in the Advising Assistance Center and Career Services (housed in Student Academic Enrichment), along with Accessibility Services, Student Success Center, and Financial Aid, work together to support student success. Staff in the federally funded TRIO program (see Core Component 3D) are selected and evaluated based on the guidelines for that program.

Additionally, personnel engage in trainings on topics relevant to their area of expertise

(Anthology, Academy and Community, Atrium Campus, UCCCD, CCMH, trainings through Accessibility Services, Accommodate Software webinars, Annual GLBA trainings through IT Services, procurement trainings, etc.) to ensure they are current with relevant educational trends and topics such as mental health and counseling strategies, ACES and trauma, technology, success strategies, financial training, and risk assessments. Counselors in Counseling Services are required to possess a relevant master's degree and an independent license in counseling or clinical social work and attend courses (CEUs) that support ongoing learning on topics essential to their professional development. Wellness Center staff maintain appropriate licensures for their positions.

Sources

- CAEP Shepherd
- CFE Faculty Resources
- Dual Enrollment
- Faculty and Staff Search Manual
- Faculty Qualifications Faculty Handbook
- IACBE Shepherd
- NSSE25 Combined Reports
- Strategic Plan Intro
- Student Course Evaluation Questions
- BOG Policy 19 Promotion and Tenure
- BOG Policy 22 Faculty Development
- BOG Policy 26 Merit
- Promotion and Tenure Resources
- Shepherd Foundation Faculty Awards
- Accessibility Services
- August 2024 Professional Development
- August 2025 Professional Development
- CFE Training Calendar 2025-26
- Faculty Affairs
- Faculty Awards and Recognition
- Financial Aid
- New Faculty
- ProfDevStudentAffairs
- Student Academic Enrichment
- Student Success Center
- TRIO
- WV Professor of the Year- Finalists and Winners
- Faculty catalog
- SU WV Professor of the Year

3.D. Support for Student Learning and Resources for Teaching

The institution provides student support services that address the needs of its student populations, as well as the teaching resources and infrastructure necessary for student success.

Argument

Shepherd offers a range of student support services to meet the needs of its diverse student body. These services collaborate to ensure each student receives the necessary assistance while also monitoring campus-wide trends to enhance overall support. Learning resources are accessible to all Shepherd students as appropriate for their level, program, and needs. Some resources, such as Scarborough Library, also serve members of the community.

Orientation programming and the First-Year Experience curriculum aid all new students in transitioning to the University culture. Orientation sessions for first year and transfer students include advisement and registration, pop-up events throughout the summer that build community, LEADS (a summer bridge program), August and January convocations, and a new student welcome program. During these sessions, students receive assistance with logistics such as residence halls, purchasing books, and obtaining parking permits; Convocation formally marks entrance to the University. The First-Year Experience classes (offered in both fall and spring) aid with college transition by fostering academic success, building a sense of community, and equipping students with essential skills for personal and professional growth. The Shepherd Success Academy, TRIO-Student Support Services, and professional advisors also work with onboarding and supporting students in their cohorts.

Accessibility Services provides accommodations in accordance with the Americans with Disabilities Act of 1990, the Americans with Disabilities Amendments Act of 2008, and Section 504 of the Rehabilitation Act of 1973, and its subsequent amendments. The office staff facilitates student success by providing academic and housing accommodations that allow students with diverse needs to achieve their academic and social potential. The office also provides exam proctoring services.

Counseling Services are available, free of charge, to all students in need of support for specific personal, interpersonal, or educational challenges. Their primary mission is to promote student wellbeing, normalize mental health challenges, reduce stigma, increase knowledge of on and off campus resources, and encourage help-seeking. Counseling Services offers individual and group counseling that is short-term and solution focused, tailored to the individual or group, and collaborative. The counseling process may include assessment, treatment, connection to available resources on and off campus, advocacy, risk assessment, psychoeducation, trauma-informed care, and case management.

Data from the Counseling Services Needs Assessment surveys have informed the following:

- Connection with Counselors – a monthly tabling event in the Rams Den connecting Counseling Services staff with students. Monthly themes include wellness promotion, collaborative resource sharing, giveaways and casual conversation to increase visibility, awareness and normalize help-seeking.
- The Well and The Serene Green – an indoor and outdoor "third space" for students that is sensory friendly, relaxing and offers opportunities for self-directed relaxation and activities. Both projects were grant funded; The Well through an HEPC Campus Mental Health Grant and The Serene Green through Marshall University's Young West Virginian-Led Project Funding.
- Support Groups – both professional and peer led.
- Marketing strategies including colorful flyers and engaging social media posts, and email newsletters.
- Elimination of session limits for individual counseling.
- Case management services to address food, housing, health insurance, and other resource needs.
- Addressing food insecurities through partnership with The Wellness Center and Coordinator of Student Community Services and Special Initiatives.
- Holiday Initiatives to provide additional food and snack items for students remaining on campus during November and Winter breaks.
- Access to the supplemental mental health resource *BetterMynd* through a state-supported grant opportunity.
- Creating sample syllabus statements for faculty to add to their syllabi in support of student mental health and resource connection.
- Presenting during Faculty Professional Development Day in 2024 and 2025.
- Increased visibility and sharing of mental health literacy through presenting to students in FYEX classes, athletics, student clubs and organizations as well as to students in specific educational departments including Nursing, Education, and Social Work.
- Increased evidence-based suicide risk prevention, education, intervention and easier access to mental health support for students. For example: coordinating Keepers of Life training for Student Affairs, and training SU Counselors with Collaborative Assessment and Management of Suicidality (CAMS) framework, evidence based intervention and treatment to combat suicidal ideation/ planning; implementing protective factors within counseling sessions.
- Training of all counselors in Accelerated Resolution Therapy to address the growing concerns of trauma-based symptoms that students are continuously experiencing and presenting difficulty in managing.
- Social media campaigns to raise awareness of services, promote wellbeing, and market services and events.
- Attending Fall and Spring Involvement Fairs to increase awareness of Sources of Strength – a peer-led suicide prevention and wellness promotion initiative.

The Health Center provides medical care to students for acute minor illness or injury, including mental health assessments and prescriptions. The Health Center serves as a West Virginia Family Planning site, works closely with the local Health Departments monitoring any outbreaks in the community, and provides loans of medical equipment and referrals to outside agencies as needed.

The Honors Program is designed to provide a varied and stimulating curriculum to students who have demonstrated the ability and willingness to engage in intellectual challenges.

Honors courses encourage critical thinking, in-depth analysis, and a greater level of student involvement. Through seminars that promote active engagement in the subject area, independent research, student-centered curriculum, and innovative teaching techniques, students in the Honors Program have the opportunity to become more self-directed in their learning. Admission to the program typically requires a high school grade point average of 3.6 or above; to remain in the Honors Program, students must maintain an overall 3.0 GPA and a 3.0 GPA in Honors courses. Students must also participate in all required Honors courses. The Honors program includes a four-year track and a transfer-track for students who have completed 30 credits from an accredited institution of higher learning. Benefits of the admission into the Honors Program include priority registration, individual Honors advisement, and dedicated Honors scholarships. Honors students have the opportunity to live in Honors housing and have access to on-campus support services dedicated to Honors and organized field trips and on-campus activities.

Student Academic Enrichment (SAE) oversees the Advising Assistance Center, Career Services, the Academic Support Center, the First-Year Experience Program, TRIO-Student Support Services &Upward Bound, faculty and professional advisor training, transfer pathway coordination, and the Common Reading Program. These services provide comprehensive support, guiding students from their first year through graduation with academic advising, career development, tutoring, transfer assistance, and enrichment programs that foster success and engagement. All of these services are housed in the lower level of the Scarborough Library. This centralized location serves as a hub for student academic support, offering comprehensive resources to help students navigate their academic journey, explore career opportunities, and achieve their educational goals. High-level discussion of the SAE units' actions follow; specific activities for the following areas are captured in the SAE Activity Reports.

The Advising Assistance Center staff provide all students with access to professional advising through both appointments and walk-in availability. The staff are the advisors of record for all students who have not declared majors (Exploratory Majors). Fully staffed year-round, the center assists with major selection, academic planning, probation/suspension avoidance, graduation requirements, and course scheduling. Upon entering the University, students receive individualized advising during Orientation, meet with their professional and/or faculty advisor, and create their first-semester class schedule. Shepherd has a hybrid advising model in which all students are assigned a faculty advisor, while students in STEM, Business, Arts, Humanities, and Social Science majors also have the support of a professional advisor early in their academic careers to assist with navigating academic and college life. Shepherd ensures all undergraduate students receive targeted, individualized advising to support their academic goals and degree completion. Undergraduate faculty advisors within academic departments guide students through course selection, mentoring, career planning, and professional development. Graduate students receive academic advising from their program coordinators and support from the Coordinator of Graduate Studies.

Career Services aids students with choosing career paths, résumé writing, job and internship searching, and interview skills, as well as opportunities to learn how to navigate the application process for federal jobs, and provides numerous opportunities for students to connect with potential employers through events, career fairs, and on-campus and virtual interviews. Career Services staff lead workshops and classroom presentations on topics such as résumé and cover letter writing, interviewing, graduate school, and professional

etiquette, and provide individualized career counseling and coaching. The Director of Career Services partners with faculty to support goal setting in first-year courses and career readiness in capstone and upper-level classes. Employers looking to hire Shepherd graduates can attend career fairs and advertise open positions via the Handshake job portal. The Future Plans Survey administered during the timeframe around Commencement provides information on what students plan to do immediately after graduation and helps inform University initiatives and priorities.

The Academic Support Center (ASC) provides comprehensive support services to help students transition to college and succeed academically. Services include peer and virtual tutoring (via Tutor.com), GPA support, academic counseling, placement testing for mathematics and English (ACCUPLACER), and proctoring of make-up exams. Recognizing that students with academic barriers are at greater risk, incoming students with deficiencies in math or English are placed in appropriate core courses based on aptitude. Those needing composition support enroll in Studio English (ENGL 101S), which includes an extra hour of small, seminar-style writing support with the same instructor. Students needing math support take one of three introductory-level courses (MATH 101, MATH 107, or MATH 109) based on their major, ensuring progress toward degree completion without added delays.

TRIO Upward Bound and TRIO Student Support Services (SSS) are federally funded grant programs established by the United States Department of Education. The TRIO Upward Bound Program helps first-generation and/or income eligible high school students gain the academic skills, personal support, and cultural exposure that will lead to high school graduation and post-secondary enrollment and completion. Participants also attend a 6-week Summer Academy enrichment program on the Shepherd University Campus. TRIO SSS serves students who are income eligible, first generation, or have documented disabilities as they pursue the baccalaureate. TRIO SSS services include academic tutoring, financial aid and literacy assistance, educational workshops, and educational/cultural activities. Program participants have access to proactive peer tutoring and mentoring, one-on-one advisement with course selection and registration, and monitoring of academic progress and intervention.

Cooperative Education, managed by academic department chairs, promotes and coordinates cooperative placements and supervision. Through co-ops, students can earn credits for working professional jobs related to their field, typically earning one credit for every fifty hours worked. In conjunction with a faculty supervisor, they complete work defined in a learning agreement that specifies their site, class assignments, and credit hours earned. Cooperative education courses are designated with course number 392 and are overseen by faculty instructors of record within various disciplines (e.g., SOCI 392: Co-Op in Sociology). Each course carries variable credit from 1 to 6 credit hours.

Student Affairs staff oversee the Global Student Leadership Team, which fosters student leaders dedicated to intercultural awareness, advocacy, and collaboration. Through a leadership development program, members cultivate community service, civility, and global citizenship. Commuter students have access to a commuter-student lounge in Stutzman-Slonaker Hall with study/lounge and kitchen spaces. Commuters may park in designated commuter parking lots, eat in campus dining facilities using flexible meal plans designed for commuters, and access the same services as residential students.

The Student Success Center (SSC) is a centralized and student-focused location of

empowerment, opportunity, and positive relationships on Shepherd's campus. The SSC's philosophy of success coaching connects with students one-to-one through personalized meetings, strengthening academic toolkits with reflective activities and customizable resources, and co-creating a plan for success to enhance self-directed learning. Students who return to campus after academic probation are also encouraged by the Office of the Registrar to seek assistance from SSC success coaches.

The Shepherd Success Academy (SSA), housed within the SSC, helps a designated group of first-year students with the transition to college. Participants are selected for the program based on their high school academic performance and, if available, SAT/ACT scores; additionally, students may be identified as at-risk if their intended major (e.g., Nursing) includes rigorous early coursework in math, science, or writing, and their academic record or test scores suggest they may need additional support in those areas. Participants meet weekly with a personal success coach and learn about campus services and create a plan for academic achievement and extracurricular involvement. SSA participants are monitored throughout the semester, and their academic performance and persistence are tracked in subsequent semesters (see Core Component 3G).

Veterans Support Services maintains a Veterans Center in Gardiner Hall, providing academic and recreational space for veterans and dependents of veterans. The Student Success Center provides a Success Coach to work specifically with the veterans/dependents population. Shepherd also offers the Veterans to Agriculture program, which uses the institution's Tabler Farm property to teach student-veterans the skills and knowledge to manage or launch a successful sustainable agriculture production business; participants also can work toward a baccalaureate concentration and/or an undergraduate certificate in Sustainable Food Production or an undergraduate certificate in Agricultural Entrepreneurship.

The National Survey of Student Engagement (2025) indicates that students, particularly seniors, appreciate and make use of the numerous opportunities for extracurricular support and engagement. While freshmen do not participate as much in extracurricular activities, seniors attend campus events (including those related to social, economic, or political issues), participate in learning communities and job shadowing, and make use of the available resources for overall well-being. Meanwhile, freshmen report greater-than-average satisfaction with their interactions with student services staff and other student-facing administrative offices and the services they receive; they are especially pleased with TRIO staff, Accessibility Services staff, and academic coaching staff.

Shepherd's technological and physical infrastructure provides students and instructors with the necessary tools for both teaching and learning, both inside and outside of the classroom.

Technological Infrastructure

Shepherd's technology infrastructure, including audio-visual and telephony, is maintained and monitored by IT Services and meets all security standards and protocols necessary to support administrative, academic, and financial needs.

Information technology used to support the academic mission includes classroom technology associated with various learning modalities (online, hybrid and face-to-face),

general-use computer labs and discipline-specific computer labs (e.g., computer science, GIS, West Virginia Department of Education (WVDE)-required software and technology preparation for teacher candidates.) Classrooms and other teaching spaces on campus are equipped with a standard set of information technologies: a computer, projector or display, and internet access including Wi-Fi. Most classrooms have additional technology capabilities such as webcams or high-end sound systems.

Shepherd has approximately 22 computer labs with over 330 computers on campus for student and faculty use. Specialized labs, a subset of the 22, are used for instruction in many disciplines. Computers are on a five to six-year rotation cycle and have a standardized set of software such as Microsoft 365. Some labs have more specialized software or hardware, as required by the needs of the academic program. Virtual labs are available with standard and specialized software via Citrix VDI, enabling distance learning and accessibility. Additional information on IT services, resources, and recent capital improvements is detailed in Core Components 4B and 4C.

D2L/Brightspace course shells are automatically generated for all courses. A majority of faculty use this technology more broadly to supplement aspects of in-person or hybrid online learning, student feedback, grading, and other forms of communication to students.

Student Affairs uses various technological systems to support faculty and staff. Guardian is a case management tool handling student conduct violations, Title IX reporting, and academic integrity violations. Accommodate is used by our students utilizing Accessibility Services to automate, simplify, and track the approval and delivery of accommodations for both students and faculty, allow for self service by students, and tracking on requests. Rave Alert, a mass notification system, is used to send emergency alerts and notifications to the campus community during unexpected situations. Streamlining, automating, and going paperless for these processes continue to increase efficiency for each department, the division, and campus overall. A suite of products from Anthology work together to support students: RamPulse (Engage), a student engagement platform, manages organizations, events, and news, and helps to gauge student activity and build student cocurricular records while Baseline, a surveying tool, allows for shared projects across University departments and comparison of assessment results with national averages and peer campuses. Atrium, CyberSource, and Identysis support the multitude of benefits through the Rambler identification card; Rambler Services encompass the printing of identification cards along with providing access to buildings, rooms, vending machines, meal plans, printing, and a variety of benefits on and off campus through Rambler Dollars.

Student Affairs and the Business Office continue to increase efficiency through information technology, in collaboration with IT Services. Academic and non-academic spaces are scheduled through the EMS Campus Calendar system, and credit card payments are accepted via a self-service application interfacing with the West Virginia State Treasurer's Office.

Tele-plus (Genetec) and Honeywell (Onity) provide services to enhance the security of the campus community, including managing exterior and interior door access as well as security cameras. Campus Kaizen's MCR software helps Residence Life manage all campus housing processes in one system. Students are able to conveniently submit housing applications, complete housing surveys, and more.

Physical Infrastructure

Library

Scarborough Library is recognized as a premier academic resource for information, innovation, and scholarly pursuit within the region. The facility includes comprehensive wireless access and data ports throughout the building, space to accommodate current and future physical collections, and a range of designated student study spaces. The library circulates laptops and additional equipment and provides access to publicly available computer workstations. Instructional spaces include Room 307, a computer lab used for library-led information literacy sessions, academic testing, faculty training, and occasional course-related instruction by professors; and Room 256, a dedicated classroom reserved for semester-long academic courses taught by university faculty. When not in use for scheduled sessions, Room 307 is available to students.

The library's holdings comprise 142,823 physical books, 348,269 electronic books, 24,062 physical media items, 1,914 physical serials, 154 course reserve items, and more than 95,000 digital serials. Additionally, the library offers full-text access to periodicals and newspapers through 167 subject-specific databases, including Nexis Uni, CINAHL Complete, MEDLINE, Academic Search Complete, MLA International Bibliography, JSTOR, Project MUSE, PsycINFO, PsycARTICLES, SciFinder, and SocINDEX.

The Dr. Howard N. Carper, Jr. Learning Commons, housed on the ground floor of the library, is a centralized location for academic advising, career services, tutoring, and other academic support for undergraduate students. It is also the home to the TRIO and Upward Bound programs and the IT Services Help Desk.

The Stubblefield Institute for Civil Political Communications was relocated to the Library in Fall 2025.

Through its extensive resources, services, and instruction, Scarborough Library actively supports Shepherd University's mission by fostering critical inquiry, promoting academic excellence, and providing consistent, comprehensive access to information for all members of the university community.

Scientific Laboratories

There are 30 labs to support teaching and research for the natural, physical, and computer sciences within three buildings: Byrd Science and Technology Center, Snyder Hall, and Stutzman-Slonaker Hall. Many of these labs are discipline-specific and well equipped for scientific exploration, such as Confocal Microscopy, Forensics Chemistry, Geological Sciences, Astrophysics, Organic Chemistry Instrumentation, Molecular Biology, Cellular Immunology, the Observatory, Robotics, and Network and Security.

The School of Nursing has clinical laboratories for Pediatrics, Mother/Baby, Critical Care, DNP, and Adult Health/Health Assessment, and a Simulation Lab with debriefing area. Additional labs include the Aquaponics Lab at Shepherd's Agricultural Innovation Center Tabler Farm, and the Psychology Lab in White Hall.

Performance Spaces

Shepherd University prides itself on exposing students to a wide variety of art, music, and theater events. Majors in artistic disciplines have ample space for classes, rehearsals, recitals, gallery shows, and performances. Programs such as the Contemporary American Theater Festival and the President's Lecture Series are open to the Shepherd community and the community at large.

The largest performance facility is the Frank Center Theater (411 seats). Several medium-size spaces include the Marinoff Theater (144 seats), Reynolds Hall (197 seats), and the Shipley Recital Hall (120 seats). The Storer Ballroom in the Student Center has variable seating for special events. Rehearsals often take place in McCoy and Choir rehearsal halls in the Frank Arts Center. Recitals take place primarily in the W. H. Shipley Recital Hall. Several studios in the Center for Contemporary Arts (i.e., Studio 112, G03, and the Phaze 2 Gallery) and the Scarborough Library's Reading Room are used for some performances and readings. The Byrd Center for Congressional History and Education hosts lectures and other special events in its auditorium. The Electronic Music Studio is equipped with computer technology with basic recording capabilities. Knutti Hall houses both a Television/Video Studio and Shepherd's radio station (WSHC); students and local artists frequently perform in these studios.

Clinical Practice Sites

In addition to the various laboratories (described above) that allow for internal clinical practice, Shepherd makes use of regional partnerships for student placements.

- Social Work requires students to complete 600 field hours in one of over 20 agencies.
- Nursing requires 510 external hours for the undergraduate nursing degree, and a minimum of 1,000 hours for the Doctor of Nursing Practice in one of 70 clinical agencies.
- The Master of Education in Educational Leadership, Higher Education concentration and the MBA have optional 150-hour internships.
- Education has partnerships with more than 13 county school systems within four states for student teaching and residency experiences. Education has also established a year-long residency program for all elementary students that has been in place since Fall 2021. All secondary education students who begin the program in Fall 2024 and later will now be required to also complete a year-long residency. By Fall of 2027, all education students will be completing a year-long residency.

Archival Resources

The Shepherd University Archives, comprising 1,559 items, are housed on the second floor of Scarborough Library in the Shepherd University Archive space. The third floor contains the West Virginia Archive, which holds the Special Collection on Local History (160 items), the West Virginia Collection (1,090 items), and the Rare Book Collection (567 items). Both archival rooms are climate-controlled and secured to ensure the preservation of materials. An additional 366 archival materials are on permanent display in glass cabinets located in the West Virginia Conference Room. An Archive Reading Room is available for supervised access to archival resources. These collections support academic programs in history, Appalachian studies, and related disciplines, and provide unique primary sources for faculty and student research.

In addition to its library collections, Shepherd University maintains a variety of artistic installations, including murals and outdoor sculptures located throughout campus. A substantial collection of world and United States Geological Survey (USGS) maps is also available for viewing in White Hall.

The Robert C. Byrd Center for Congressional History and Education, on the campus of Shepherd University, maintains congressional paper collections of U.S. Senator Robert Byrd and numerous members and officers of the U.S. House of Representatives.

Sources

- Byrd Center Archives
- Scarborough Library
- Accessibility Services
- CONVOCATION
- CONVOCATION1
- Counseling Needs Assessment surveys
- Counseling Offered Services
- Counseling Services Intro
- FYEX COURSES
- FYEX
- HEALTH CENTER
- LEADS_SUMMER BRIDGE
- ACADEMIC ADVISING MANUAL
- ACADEMIC SUPPORT CENTER
- ADVISING ASSISTANCE CENTER1
- CAREER SERVICES
- COMMON READING
- HONORS PROGRAM1
- SAE Activity Reports Over Time
- STUDENT ACADEMIC ENRICHMENT
- TRANSFER PATHWAYS
- TRIO_SSS
- TRIO_UPWARD BOUND
- Career Assessment And Exploration
- Career Information For Employers
- Career Service Event
- COOPERATIVE EDUCATION
- Future-Plans-Surveys
- Brightspace splash page
- Commuter Spaces
- Commuter Students
- ems campus calendar
- Global Student Leadership Team
- ITServices
- NSSE25 Combined Reports
- Shepherd Success Academy
- Student Affairs Systems Screenshots
- Student Success Center

- Tabler Farm
- VETERANS SUPPORT SERVICES
- VETERANS_AGRICULTURE

3.E. Assessment of Student Learning

The institution improves the quality of educational programs based on its assessment of student learning.

Argument

The assessment process at Shepherd is robust, multi-tiered, and interconnected. Campus-wide goals for student learning are clearly articulated in Shepherd's current strategic plan and Core Curriculum. Academic programs undertake regular two-year cycles of assessment and have assessment coordinators who draft these individual assessment plans.

At the course level, instructors are required to list all student learning outcomes on course syllabi, as well as the Liberal Education and America's Promise (LEAP) goals addressed by the course content. A syllabus template, accessible on the Center for Faculty Excellence (CFE) website, is updated (at least) annually and contains examples of student learning outcomes as well as explanations of LEAP goals and optional adoption of AAC&U's Value rubrics. Prior to the start of each semester, chairs, directors, and deans review syllabi to verify that student learning outcomes, goals, and other required elements are included on the syllabi.

Core Curriculum courses go through an additional review process. Courses seeking approval for addition to the Core Curriculum must have assessment plans. Each core course must be assessed in the designated competencies outlined in the core rotation each semester it is offered. Assessment plans in the core are required to have one outcome and one measure for each of the designated competencies outlined in the core rotation. All newly approved Core Curriculum courses require a course level assessment plan which is approved by the Core Curriculum Committee.

Fully online asynchronous courses are subject to review by chairs and deans as for other courses. Shepherd's Instructional Designer has attended conferences and workshops to provide additional guidance to fully online and hybrid courses, and assists with templates and best practice in online learning.

The Office of Student Academic Enrichment (SAE) administers the National Survey of Student Engagement (NSSE) every three years to gain a more robust understanding of the effectiveness of the student learning experience. All score reports are available through the SAE by request. Reports are also shared with various groups across campus including the Executive Leadership Team, Academic Affairs leadership, and the Faculty Senate.

Office of Assessment

A significant amount of the assessment of student learning on campus is coordinated by the Office of Assessment. Academic programs have been positively engaged in this work for numerous years (see this example from the 2021 Assurance Argument). However, the departure of long-serving administrators (including the lead voice in assessment) and

subsequent reorganization of the Office of Academic Affairs provided an opportunity to reconceptualize how to provide the necessary support for academic assessment efforts, as well as how to maintain and enhance the culture of assessment on campus. Although the emphasis of the Higher Learning Commission criteria has been on assessment of student learning, the University recognized that expanding institutional efforts to administrative areas would strengthen the culture of assessment; while administrative units had previously participated in assessment, the campus assessment office had been focused more on academic assessment. Both academic and administrative processes are now directly parallel.

At the academic unit level (programmatic or Core Curriculum), units develop, articulate, and submit assessment reports to the Director of Assessment on a two-year cycle. For programmatic assessment, programs establish a minimum of three outcomes with two measures per outcome. Programs choose metrics germane to their disciplines and clearly link student learning to appropriate benchmarks and goals, in order to measure the most meaningful outcomes of this work. Programs that have externally established assessment parameters or requirements (such as those with specialized accreditation) are encouraged to focus on those parameters, as opposed to inventing new ones for this process. This methodology for program assessment has been well established at the institution for several years, and continues to produce excellent results.

The Core Curriculum assesses all competencies designated in the Core Curriculum Framework. To make this assessment more robust, the Director of Assessment and the Associate Vice President for Institutional Effectiveness worked with the Chair of the Core Curriculum Committee and subsequently the entire Committee to structure a revised Core Competency rotation across all tiers of the Curriculum. Each course's home academic unit is responsible for administering its assessments per the Core Rotation Guidelines. The complexity and breadth of the current Core Curriculum requires a careful adherence to the Guidelines.

Shepherd's methodologies reflect good assessment practice. The Office of Assessment uses the Weave assessment management software for faculty and staff. This database provides clear templates for assessment, excellent storage space for artifacts, the ability to link outcomes to goals at various levels throughout the institution, and assessment reporting tools. For guidance, the Office uses the National Institute for Learning Outcomes Assessment (NILOA) transparency framework. This framework is prominently displayed on the Assessment page, which provides numerous resources for faculty and staff to utilize for assessment of their own classes and programs.

The Director of Assessment works in tandem with chairs, directors, appointed Assessment Coordinators, and administration for review, oversight and quality assurance, which promotes the culture of assessment across campus. Under the current plan, assessments are far more individualized, with unit heads (college deans on the academic side, area vice presidents on the administrative side) playing a more defined role than in previous years. This engagement of deans and VPs is designed to provide accountability or (for units with less-developed assessment processes) provide support from their supervisors toward development of a culture of assessment within the unit. These unit heads are provided access to all of their units' materials along with summaries of the engagement of their assessment coordinators across their entire unit. Changes within assignments are communicated to both the unit head and the person in their unit overseeing specific

assessment duties. In the wake of the <u>academic restructuring</u> that accompanied the 2023 Academic Prioritization process, the Director has worked with unit heads to smooth the transitions in assessment of areas for which responsibilities changed as a result of the restructuring process.

The Director of Assessment <u>works directly with the unit heads</u> to identify the Assessment Coordinators. These Coordinators are the responsible parties for assessment of programs, Core Curriculum courses, or an administrative unit. The Director works individually with each Coordinator, regardless of experience. This active engagement is designed to keep the assessment process running smoothly. The Director of Assessment <u>assists</u> each Assessment Coordinator via onboarding and training that reviews the assessment expectations for Shepherd University and how to operate the Weave assessment software. The Director of Assessment <u>maintains project status documentation</u>, <u>communicates necessary updates</u> to the Coordinators, and <u>provides summaries</u> for their areas, which are also sent to the unit heads. Thus, the Assessment Office, Assessment Coordinators, and Unit Heads all have a consistent understanding of process, progress, and problems, and can work collaboratively to address them.

Until recently, administrative units had been asked to assess learning goals, as the academic units do. While this worked well for some administrative units (e.g. Scarborough Library, some areas of the Division of Student Affairs), this was difficult for other units to incorporate in a meaningful manner. As part of the restructuring of the Office of Assessment, the Director of Assessment changed the focus for these units to administrative-aligned outcomes; this allows all administrative offices to evaluate the most appropriate aspects of their offices, instead of attempting to fit their assessments into an academic assessment framework. This also emphasized that a culture of assessment is meaningful and necessary across all areas of campus, recognizing the importance of the contributions of all offices on campus. Due to this issue, engaging the administrative units is still a work in progress, but the material provided by those areas is encouraging. Shepherd's programs targeted toward promoting retention and academic performance of students (see Core Component 3D for examples) are structured to produce useful outcomes data that can be used for assessment and improvement. For example, use of peer tutors is tracked to evaluate overall demand for tutoring services, demand in specific areas, student satisfaction with tutoring, and other useful metrics; Tutor.com also provides analytics for their services.

For some years, an Assessment Task Force was involved in the assessment process. However, over the years, the role of that group became less well-defined. Currently, the Director of Assessment reviews all projects to determine if outcomes, measures and findings are all completed. If Assessment Coordinators are unsure about any elements of the process, the Director meets with those Coordinators to assist them with their understanding of the process and to assist with completion of their work.

The campus focus on assessment of student learning has produced many significant improvements. Some examples of improvements achieved through the assessment process include the following:

Accounting: The accounting curriculum changed in 2025-2026 due to a need to meet the needs of the new CPA exam requirements. Changes include:

- Allowing freshmen to take ACCT 201: Principles of Financial Accounting I (change in a

prerequisite of sophomore standing).

- Requiring FINC 250: Financial Literacy & Well Being, as the wellness core requirement.
- Changing the course title of ACCT 405 from Advanced Cost Accounting to Advanced Managerial Accounting to better reflect the topics in the course.
- Eliminating BADM 313: Business Law II, and BADM 315: Quantitative Methods, from the program.
- Adding FINC 308: Introduction to Financial Planning, and CIS 105: IT Infrastructure, Cybersecurity, and Data Integrity (developed by the Department of Computer Sciences, Mathematics, and Engineering to meet the new technology requirements for the CPA exam) to the accounting program.
- Adding a suggestion of other courses to the catalog as electives to prepare for the certified management accountant (CMA) exam, as the comprehensive accounting program focuses on both CPA and CMA certifications.

Art:

- The BFA in Sculpture and BFA in Printmaking were dropped due to retirements of full-time faculty and low enrollment; however, three Sculpture related courses and two Printmaking courses continue to be taught by highly qualified adjuncts to continue to supplement the breadth of the curriculum.
- ART 140: Visual Thinking curriculum was revised based on student evaluations of the course; Art faculty expertise was reallocated, and instructional delivery was adjusted to provide a lower student to faculty ratio.
- ARED 400: Arts-based Research Methods was incorporated into the program to address student feedback on maintaining their connection to studio practice as they dove deeper into the education (teaching practice) coursework of their program. This one credit course is taught alongside ARED 345: Curriculum and Instruction in Art Education and ARED 427: Methods for Teaching Art to support the conceptual focus on artist, researcher, and teacher best practices in the field.

Business:

The Department of Business, Accounting, Economics, and Finance changed vendors from ETS to Peregrine beginning in the 2024-2025 academic year. This change was completed for two primary reasons - the testing platform was difficult to operate and required technical support, often during student testing; and the Peregrine system includes improved data access and reporting capabilities. The system consists of a minimum of 14 detailed reports and allows for customization for our particular programs. The primary outcomes of this switch so far include:

- Identification of the need to change testing methods and incentives. There is a direct relationship between the time spent on taking the test and the outcomes. Initial results indicate that Shepherd students are spending more time on the test than the average student. Shepherd students need more incentive and time to spend on the test.
- Clearly identified strengths and weaknesses in the program. For example, students performed much better in BADM 323: Human Resources and Business Ethics (previously titled Human Resources Management; in which students are required to take a full-semester course) than in BADM 380: Organizational Behavior (which is offered only occasionally as an elective), indicating a curricular problem.

- Identification of the need for personnel improvements. For example, reports indicated that our aviation students who took AVIA 378: Aviation Law significantly outperformed other students at our institution and at other institutions in the Legal Environment of Business. Additional curricular and personnel considerations are being made based on these results.

Communications:

- The COMM 203: New Media curriculum was revised to best use the specific content expertise of COMM faculty. This effort bolsters the breadth of the curriculum of those courses and keeps full time tenure track faculty engaged with COMM students from the very start of their academic careers.

Education:

- The Shepherd University School of Education (SOE) and Educator Preparation Program (EPP) have developed a comprehensive plan to ensure continuous improvement across all programs. This plan is grounded in both Council for the Accreditation of Educator Preparation (CAEP) accreditation and West Virginia Department of Education (WVDE) guidelines and informed by stakeholder feedback, data analysis, and best practices. The overarching goal of these efforts is to enhance teacher preparation and maintain accreditation compliance while fostering candidate success.
- Since spring 2023, the EPP has focused on implementing a Common Lesson Plan (CLP) template and rubric to standardize lesson planning and integrate edTPA assessment and support system elements. The initiative began with a pilot in fall 2023, followed by revisions based on feedback, and will culminate in a full rollout by spring 2026. Alongside this, curriculum adjustments occur continuously, with faculty using quantitative and qualitative data to refine courses and programs each semester.
- To strengthen data-driven decision-making, the EPP resumed hosting annual data retreats starting spring 2025. These collaborative sessions allow internal and external stakeholders to analyze CAEP standards and EPP-wide key assessments, identify areas for improvement, and address accreditation concerns. Similarly, edTPA support within the EDUC 461 Clinical Experience Seminar (WM/CORE) course has been enhanced through bootcamps and mini-edTPA assignments, which have led to measurable improvements in candidate performance. Other initiatives include standardizing the EDUC 150 Job Shadow and Reflection Essay (FYEX/CORE) as a key assessment, finalizing its rubric in fall 2025, and streamlining data collection through iRubric. The EPP also adopted an official definition of diversity, equity, and inclusion in spring 2025 to align with accreditation requirements. Surveys for candidates (mid-point, exit), alumni, and employers have been revised to improve response rates, with MS Forms now serving as the primary collection tool.
- Recruitment strategies outlined in the 2023–2027 plan aim to grow enrollment through targeted events and data monitoring. The Yearlong Residency (YRL), first introduced in 2018, has been fully implemented for elementary programs and is expanding to secondary programs, with adjustments based on feedback from candidates, faculty, and P-12 partners.

English:

- Previous assessments of English 101/101S (Writing and Rhetoric I/Studio) portfolios show that English continues to meet its goals for student outcome and skills. Nevertheless, students could use more practice and training to demonstrate (per the assessment plan) "metacognitive awareness of an evolution in their ability to communicate in written English." At an October 2025 workshop held for ENGL 101/101S and 102 (Writing and Rhetoric II) instructors, strategies to strengthen these skills were discussed; faculty also reviewed learning goals and intended student outcomes for ENGL 102, while also sharing ideas for course planning and pedagogy.
- The program reviewed both recent NSSE data and the University's new Strategic Plan, and noticed and embraced both documents' emphasis on the need for more high-impact learning experiences for first- and second-year students. ENGL 215: The Art of Literature, a Core Curriculum class that also feeds into the English program, is a prime course in which to implement a high-impact learning experience. Thus, in 2024, a modest course fee was added to the class, which has covered the costs of field trips to Washington, DC; Baltimore, Maryland; and other sites or events relevant to student coursework. Students have travelled, for instance, to the American Shakespeare Center's Blackfriars Playhouse in Staunton, Virginia, for their staging of *A Midsummer Night's Dream*, a trip taken with the ENGL 421: Shakespeare course as well. This past October, the ENGL 215 students visited three sites in Baltimore connected to American writer Edgar Allan Poe.
- The Exit Survey that all students in the Capstone class complete tries to gauge respondents' feelings about their career readiness. It is an open-ended question, and not every student replies to that particular prompt, but for some time students have reported uncertainty about their job prospects. In response, the transition-to-the-workplace component of the Capstone class has been made more deliberate (e.g., job search workshops, practice interviews, professional portfolios). In order to address these insecurities more directly, a mini-credential, a Professional Writing Certificate, now exists to help students feel more prepared for careers focused on written communication. There are three different versions of the Certificate (viz. Writing for the Professions, Writing in the Workplace, and Professional Writing and Design). Each version is based upon the student's career ambitions. Just as significantly, curricular changes have been made to help students feel more prepared for careers focused on written communication. The previous course, ENGL 382: Technical Editing, was revised and redesigned into the current course, ENGL 382: Business and Professional Writing. ENGL 384: Grant Writing has also been created.
- In response to revisions to the capstone course, which requires a professional portfolio of student writing that speaks to a public audience, ENGL 476: Practicum in English course has been reimagined. Enrolled students now create *The Final Draft*, an almost entirely-student generated newsletter highlighting achievements and news from the English and Modern Languages Programs. Students enrolled in ENGL 476 have ready-made materials for their portfolios, as well as professional, public-facing projects that they can show potential employers.
- The Senior Exit Survey has been revised to capture more precise data, breaking questions that were grouped together into separate questions. One original question read "to what extent are your satisfied that your work as an English Major developed your sensitivity to representations of gender and race." This has been reconfigured into two separate questions in order to delineate the categories of race and gender. The new questions will conclude with "sensitivity to representations of gender" and "sensitivity to representation of race."

Political Science / Global Studies:

- The 2018-2019 PSCI assessment report indicates shortfalls in experiential learning opportunities: "only 10% indicated that they agreed (n=1) and 40% were neutral (n=4) that there were adequate opportunities for out-of-class opportunities like fieldtrips and travel abroad; in fact, 50% indicated that they disagreed or strongly disagreed that there were sufficient opportunities." Similarly, feedback from the Global Studies program review (2021) showed that financial concerns limited students from being able to participate in study abroad programs and other international experiences. In response, the department initially added course fees to several courses (GLBL 200:Introduction to Global Studies and PSCI 200:American Political Institutions) in order to help fund more of these activities, however COVID-19 undermined this initial response.
- In 2022, the department moved to an alternate strategy of increased access by promoting study abroad and internship opportunities rather than utilizing an internal course fee. In order to increase access to study abroad, the Study Abroad director (a faculty member in the PSCI and GLBL programs), negotiated two new academic partnerships to provide affordable exchange opportunities. He also revitalized existing agreements, and members of the department promoted study abroad and internships in advising. This led to a dramatic increase in Study Abroad participation: between fall 2022 and summer 2025, 13 students in PSCI and GLBL participated in individual study abroad programs.
- Similarly, department members promoted funded internship opportunities and other experiential opportunities, leading two students to participate in the Herndon Fellowship with the WV State Legislature, two students to be selected for the PPIA Junior Year Institute, and a student to be selected as a Rangel Fellow, as well as a recurring placement of funded student interns in the Jefferson County Development Authority. The department is also working to establish a new partnership with the County Commission.

Spanish:

- One example of improvements achieved through assessment processes has been the revamping of the Spanish curriculum. This revision, developed in 2021 and implemented in 2022, impacted the major and the minor. The changes were informed largely by recommendations from an external reviewer who evaluated the program during the last five-year review (i.e., 2020 – 2021). The prior Spanish curriculum was predominantly a belletristic approach to language learning. Almost half of the curriculum for the Spanish major was devoted to upper-division electives, and of those 21 options, 12 of them (57%) were literature courses like SPAN 310: Survey of Spanish Literature I or SPAN 403: Survey in Spanish IV: Hispanic Poetry. The adjustments that we made resulted in a curriculum for majors and minors that is less literature-focused and more oriented toward real-life applications aligned with current labor market demands. These improvements were driven not by deficiencies in the prior curriculum but by the decreasing marketability of the previous model and by the need for a program that was more synergistic with existing academic offerings, thereby facilitating dual majors. The new Spanish curriculum now has options ranging from SPAN 305: Spanish for the Professions to BADM 359: International Business to HIST 445: Latin America to 1840.
- A second example of improvements resulting from assessment processes impacts

majors, minors, and students taking Spanish classes as part of their Core Curriculum/BA requirements. Most program-effectiveness assessment data had been collected from a single course, SPAN 485: Capstone Presentation. Focusing so heavily on this one course for assessment unintentionally excluded Spanish minors and students taking Spanish to fulfill Core requirements. Every semester, students in SPAN 102: Elementary Spanish II, SPAN 204: Intermediate Spanish II, and SPAN 301: Advanced Conversation and Composition I take the Standards-Based Measure of Proficiency (STAMP) test, which is offered by Avant Assessment. It is an online, nationwide test used by institutions like Stony Brook University, Cal State, and Tulane University, and it measures students' abilities in four skill sets: reading, writing, speaking, and listening. The beauty of these data is that they capture information for students who have a BA-related language requirement, students taking Spanish classes for Core Curriculum credits, and students in both the major and minor. Although the STAMP test and its data have long been available to us, they had not been integrated as central assessment tools. Moving forward, the STAMP exam will become a key mechanism for identifying areas of need and guiding ongoing program improvements.

The examples presented above highlight just some of the best practices and recent examples in utilizing assessments to modify, replace, and enhance instruction and student services.

Sources

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3.F. Program Review

The institution improves its curriculum based on periodic program review.

Argument

Shepherd University's Program Review process is governed by the West Virginia Higher Policy Commission (WV-HEPC). WV-HEPC Series 10 Policy Regarding Program Reviews codifies the parameters of this process. Since Shepherd's most recent reaffirmation of accreditation in 2021-2022, the program review process has been significantly revised, largely due to alterations to Series 10 and WV-HEPC's subsequent recommendations based on these revisions.

The 2008 version of Series 10 required Shepherd's Board of Governors (BoG) to review all programs offered at the University at least once every five years in order to address "the viability, adequacy, necessity, and consistency with mission of the programs to the institutional master plan, the institutional compact, and the education and workforce needs of the responsibility district." However, there was little guidance within the Policy regarding specific approaches that should be taken by institutions to fulfill the policy mandate.

Shepherd's previous process was based upon the unit self-study. Programs were reviewed on a rolling five-year schedule, with several programs reviewed each year. Programs up for review received information including prior review materials, data sets from the Office of Institutional Research, and rubrics for evaluation as provided to the internal and external reviewers. The program mission, student learning and career placement outcomes, faculty scholarship, and assessment reports were evaluated. An internal review committee and independent external experts ensured that evaluation was both focused and broad. Results were compiled and submitted to the BoG for review and approval of the resulting recommendations; the program reviews and findings were then submitted to the WV-HEPC for final approval. Findings from the program review process were evaluated and improvements identified and implemented, providing a major part of the institutional assessment process and ensuring that unit operations reflected the mission and strategic priorities of the University.

The 2022 version of Series 10 was a significant revision, requiring an entirely new implementation framework. In November 2022, the WV-HEPC assembled a small task force of national experts, Commission experts, and select representatives from higher education institutions across the state (including Shepherd University) to develop a Comprehensive Implementation Plan for the new requirements of Series 10. In early February of 2023, university governing boards across the state were invited to an interactive presentation hosted by the HEPC. This provided context for the implementation plan, in preparation for a statewide multiday workshop involving all HEPC institutions. The mid-February 2023 workshop provided background for the revised policy, insights from the national experts and WV higher education members of the implementation task force, and a finalized implementation plan based on the work of the task force. During the workshop, CAOs, CIROs, and CFOs were able to engage directly with the WV-HEPC and task force members.

Following the workshop, <u>guidance memos</u> were provided to the universities by the WV-HEPC to assist institutions in developing their internal program review processes.

As outlined to the Shepherd BoG in <u>April 2023</u>, a three-horizon program review process was created to reflect the new policy requirements:

- Long Horizon – Program Review. While the five-year timeframe remained in place, the implementation process presented by HEPC allowed for simultaneous evaluation of all programs. Given the resources of an institution of Shepherd's size, simultaneous self-studies of all programs would be prohibitively expensive (in both cost and labor) to implement. The Offices of Institutional Effectiveness, Institutional Research, and Finance designed a <u>methodology</u> that allows for simultaneous review of all academic programs in compliance with the revised Series 10. As it happened, this process was planned and largely in place prior to the BoG-directed academic prioritization process in the fall of 2023, and was used successfully for that endeavor. Per the timeframe stipulated by the WV-HEPC, the initial program review process under the new plan will take place in academic year 2026-2027. The Provost, Deans, and Chairs were <u>most recently briefed</u> on this topic in early January 2026.
- Medium Horizon – Three-year Rolling Review. The HEPC requires annual submission of a three-year rolling planning document. This reports planned additions, deletions, and significant modifications of academic programs, and is intended to facilitate coordination among universities regarding planning and program offerings. College deans work with their programs to plan and compile the necessary information, and complete the <u>reporting template</u>.
- Short Horizon – Internal Academic Viability. Each year, programs are <u>presented a set</u> of four viability metrics, along with a series of questions designed to evaluate their unit's performance against University-wide metrics. Unit responses are word-limited, and units are asked for initiatives that would be actionable in the short term (1-2 semesters). Unit chairs and directors discuss the responses with the college deans, who then provide the results to the Provost (along with their feedback).

These three processes are interwoven, and allow programs to develop actionable processes based on verifiable data.

Programs may, with the approval of Academic Affairs, pursue specialized accreditation if accreditation would benefit program quality and student success, and if sufficient resources are available. In addition to the University's accreditation with the HLC, Shepherd maintains accreditations with the following <u>bodies</u>:

- American Society for Biochemistry and Molecular Biology (ASBMB)
- Commission on Accreditation of Allied Health Education Programs (CAAHEP)
- Commission on Collegiate Nursing Education (CCNE)
- Council for the Accreditation of Educator Preparation (CAEP)
- Council on Accreditation of Parks, Recreation, Tourism and Related Professions (COAPRT)
- Council on Social Work Education (CSWE)
- International Assembly for Collegiate Business Education (IACBE)
- National Association of Schools of Music (NASM)

Programs with specialized accreditation are also reviewed per the requirements of their

accrediting bodies.

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3.G. Student Success Outcomes

The institution's student success outcomes demonstrate continuous improvement, taking into account the student populations it serves and benchmarks that reference peer institutions.

Argument

The processes, procedures, and principles described previously in this criterion frame Shepherd's approach toward provision of the best possible educational opportunities for its students, and the assessment and evaluation techniques that allow the University to gauge student progress and efficacy of its programs, and to create opportunities for student success.

Shepherd's current strategic plan (2023-2028) addresses the need to continually review recruitment and retention as well as further investing in the value of high impact practices and career development. The plan's text and strategic priorities outline the University's plans to improve student learning, provide technology for student learning, and promote degree completion.

The University defines enrollment and retention goals that are ambitious but attainable, while planning with current and future challenges in mind. Enrollment goals are defined using predictive modeling and are based upon prior year data as well as West Virginia Higher Education Policy Commission (WV-HEPC) state and national peer data and information on emerging trends in student demographics, enrollment, and persistence. Shepherd has a significant number of low-income, first-generation, and non-traditional students, groups that face particular hurdles to their progress. In recent years, goals have been set to address the decline in high school graduates and increased demand for graduate enrollments (both degree-seeking and nondegree), as well as increasing financial need, resistance to student loan debt, and institutional competition, among other phenomena.

Enrollment, demographic, and retention data are gathered by the Office of Institutional Research (IR). Shepherd's population data, combined with state and national-trend data, are used to define goals for student success. Shepherd also works with the state of West Virginia to track institutional performance via the WV Higher Education Almanac, an annual document produced by the WV-HEPC. This document includes statistical information related to persistence and completion and connects to targets and goals outlined by the University strategic plan.

Shepherd has maintained an average fall-to-fall retention rate for first-time, full-time baccalaureate-seeking students of 69.8% (ranging from 66.2% to 72.1%) for the last five fall cohorts. These rates, which fluctuate from year to year, nevertheless represent an improvement over rates from older cohorts; the unusually low rate for the Fall 2020 cohort was most likely a reflection of the pandemic-related instability in higher education at that time.

Shepherd collects and analyzes information on student retention, persistence, and degree completion. Much of this is handled by the Office of Institutional Research (IR), which posts data on the IR website and provides it to administration, faculty, and staff. Data are also provided in compliance with relevant federal, state, or accreditation regulations and are made available through the institution's Consumer Information page.

In Spring 2025, the HLC introduced tracked student success indicators for its institutions. Per the HLC, these indicators "will use publicly available data from the IPEDS Fall Enrollment, Graduation Rates and Outcome Measures surveys to compute and evaluate three educational outcome measures for institutions that enroll undergraduate students:

- First-year retention rate
- Graduation rate within 150% of normal time
- Completion and transfer rate at eight years after entry"

A comparison of Shepherd's indicators to those of Shepherd's WV Higher Education Policy Commission peers shows that Shepherd's First-Year Retention Rate and Completion and Transfer Rate three-year means compare favorably to the average of our peers, while the Graduation Rate is slightly under that of the average of our peers. Even then, the comparison with the individual institutions show that the Graduation Rate for Shepherd is in the top half of the distribution of values, which is a positive indicator.

As part of assessment processes (Core Component 3E) and the program review process (Core Component 3F), individual departments and units often track the success of their students. Academic Affairs, the Student Success Center, and Student Academic Enrichment all track and use data for planning purposes. The University's TRIO Student Support Services establish and evaluate their own goals for persistence, academic performance, and completion per federal guidelines. In compliance with Federal CFR Title 23, part 668.48, the progress of student athletes is also tracked and reported on the IR webpage.

Weekly enrollment reports are presented to the Executive Leadership Team to allow for constant monitoring of enrollment, and inform budgeting, course scheduling, student support services, auxiliaries, and other areas of the University. Enrollment updates are also provided to the Board of Governors, academic leadership, the Classified Employees Council, and various other campus-wide bodies. Enrollment projections inform decisions across campus. Examples of adjustments made based upon observed enrollment trends appear in the regular Enrollment Management reports to the Board of Governors, and in other area reports to the BoG. Improvements in marketing and recruitment strategies result from observed trends in admissions as well as a regular survey of non-matriculated students, and programs such as the Last Dollar Fund.

Licensure Pass Rates

Licensure pass rates provide further evidence of the ability of Shepherd graduates to meet national and professional standards. When benchmarks are not reached, programs have modified and aligned curricula with these standards, hired staff, and held test preparation workshops to ensure increased success rates on licensure exams.

Department of Business, Accounting, Economics, and Finance – Accounting B.S.

Shepherd has traditionally had high scores and pass rates on the Uniform Certified Public

Accountant Examination (CPA). Recent results show that Shepherd's overall pass rates and average scores are consistently higher than the state average. The National Association of State Boards of Accounting reporting notes that Shepherd pass rates and average rates are "well above the national average"; Shepherd students also "outperformed peers in Maryland, Pennsylvania, and Virginia."

School of Education

To attain professional teacher licensure within the State of West Virginia, all teacher candidates at Shepherd University must take and pass the Educative Teacher Performance Assessment (edTPA) for their individual and specific area of licensure during their final clinical experience. The Educator Preparation Program, which oversees the Educator Preparation Program (EPP) at Shepherd, maintains the responsibility to ensure that all specialization areas offered across the EPP are created and maintained such that teacher candidates can succeed while at Shepherd University as well as in the PK-12 classroom beyond graduation. The results of the edTPA are just one of the ways that the EPPC measures program effectiveness to make programmatic revisions as needed and as aligned with both the WV Department of Education as well as the Program's external accreditors, the Council for the Accreditation of Educator Preparation (CAEP).

School of Nursing

The NCLEX-RN pass rate is reported by the National Council of State Boards of Nursing (NCSBN). Data are compared to state and national trends. The West Virginia RN Board requires nursing programs to have a first-time NCLEX-RN pass rate of 80%. If the pass rate is not achieved, the WV RN Board requires submission of a program improvement plan. Shepherd's NCLEX-RN first-time pass rate for Nursing students has remained above the WV RN Board 80% benchmark in recent years.

Department of Social and Applied Behavioral Science – Social Work B.S.W.

Shepherd's pass rate for the Association of Social Work Boards licensing exam has consistently exceeded national pass rate averages. Due to prior Association of Social Work Boards confidentiality requirements, Shepherd had not been able to compare Shepherd's pass rate to those of other programs. As those rules have been relaxed, scores are now available for individual school pass rates on the ASWB website. For the most recent publicly available data (August 2025), Shepherd's pass rate not only significantly surpasses the North American average, but also exceeds those of all West Virginia institutions.

 Office of Financial Aid

The Office of Financial Aid has implemented a Satisfactory Academic Progress (SAP) appeal process for students who lose financial aid eligibility. In collaboration with Financial Aid staff, students develop an Academic Plan for Progress to ensure progress toward graduation. In addition, staff have increased financial literacy efforts with presentations to all First-Year Experience classes and other groups, as well as extended exit-counseling sessions, which had resulted in a consistently lower Cohort Default Rate (CDR) than those across the state of West Virginia (as discussed in Shepherd's 2021 Assurance Argument [written during the COVID-19 national emergency but discussing data available before the emergency], this value was under 7%). The 0% CDR for recent years due to the COVID-19 national emergency putting a hold on defaulted federal loans (as

reported by the Department of Education) make it difficult to draw additional conclusions at this time.

Student Affairs

Since 2015, Shepherd has utilized <u>Beacon</u>, an early alert platform through Anthology, to assess risk factors and connect campus-wide student data to faculty/staff generated notifications in an effort to identify at-risk students. As of Fall 2025, this system was sunset and the University is in the process of on-boarding a new system to support Student Success initiatives. In order to not lose momentum during the period between the two platforms, a Microsoft form was created to allow faculty and staff to still have a <u>tool for reporting student concerns</u>. While not as robust in its reporting, this process supports our efforts to quickly address student needs. The <u>Annual Reports</u> for the Student Success Center address how these data are used for continuous improvement.

In 2018, Student Affairs incorporated the S*tudent Strengths Inventory* which was an assessment distributed through Beacon and provided to incoming students. This assessment collected information that provided insight into our new students' non-cognitive behaviors as they enter college. By 2024, enough data were available for a proper review of three-year averages per the 48 statements found within the assessment. In August of 2024, <u>results were presented</u> to faculty during a Professional Development Day. Insights showed that over half of all new students worry, waste time before settling down, get anxious, and struggle knowing what to say when meeting new people. The data also showed that students had a high belief in their academic engagement (46%) but low comfort in social settings (13%). Due to the sunsetting of Beacon, the now *Shepherd Student Inventory* (SSI) survey has been moved to the Baseline tool.

The Student Success Committee is charged with "developing, implementing, and assessing the Student Success Plan." As the University develops initiatives to support student success, the committee brings faculty, staff, and students together to provide support, recommendations, information, and resources for student success.

Student Success Center

The Student Success Center (SSC), established in 2020, provides centralized and student-focused services to Shepherd students. SSC staff provide short-term success coaching by connecting with students one-to-one through personalized meetings, filling their academic toolkits with reflective activities and customizable resources, and co-creating a personalized success plan. Students learn new skills and mindsets as self-directed learners and future professionals in and out of the classroom. In addition to professional success coaches, trained peer success leaders assist their peers with specific assignments and projects, course study tips, and social connections at the University. While students may engage with the SSC as part of an early alert notification or referral, participation is voluntary, and the SSC encourages all students to visit. Students may drop by during specific hours of the week to schedule a one-time visit, a peer success leader meeting, or a series of meetings. Not every student will need to meet weekly, and a success coach is able to determine specific needs of each student.

The Shepherd Success Academy (SSA) is a specific program housed within the SSC that has consistently tracked performance and persistence of participants from its first cohort in

Fall 2017 through to the most recent cohort (Fall 2024). SSA-eligible students entering each fall are tracked in two cohorts: <u>SSA participants</u>, and those who declined participation. Results so far show that SSA participants consistently match or outperform non-participants in fall-to-spring persistence, fall-to-fall persistence, and percentage of students in good academic standing as of the end of the term; SSA participants also had higher mean end-of-term GPAs in three of the four cohort years. The SSA will implement additional activities and improvements based upon student feedback from <u>pre</u> - and <u>post</u>-survey results.

Student Success Center - Other Cohort Based Programs

The Student Success Center has implemented many cohort-based programs. In prior years, the <u>Academic Probation Recovery (APR)</u> Program (students on their first probation at the end of a spring semester, targeted for assistance the following fall) and the <u>Student Athlete Success (SAS)</u> Program (athletes who were ineligible to play in their sport in need of assistance to regain eligibility status) were the main cohorts. As for the SSA (see above), students who choose to participate are tracked in one cohort, and those who decline participation are tracked in a comparison cohort. Progress throughout the semester is monitored, as is retention and performance into the next term. Tracking data indicates that APR and SAS program participants raise their midterm grades and overall GPAs over the course of the semester, are more likely to be retained, and are more successful at avoiding academic suspension than non-participants. Throughout the years, the Shepherd Athletic Success Program and the Academic Probation Recovery Program have become less structured due to a decline in resources. The Student Success Center still assists students who are on probation by working with a success coach, a recommendation communicated to students through the Office of the Registrar. In addition, the SSC takes referrals from athletic coaches and the compliance coordinator to assist student-athletes with academic eligibility.

TRIO

TRIO Student Support Services typically serves 160-170 students each year and continues to maintain strong persistence and graduation rates for its participants. For all cohorts after the first year of objectives reporting (2011-12), over 90% of students have maintained good academic standing. The program has consistently exceeded its persistence goals by at least eleven percent each year, and, after the first year, its good academic standing goals by at least 6%. Baccalaureate graduation rates have also exceeded graduation-rate goals in all but one year.

Based upon analysis of the retention and persistence of students served by TRIO SSS, Shepherd added more dedicated full-time advisors and success coaches for the entire campus and established both an Advising Assistance Center and the Student Success Center (both discussed earlier in this Core Component).

Institutional Research

The <u>Office of Institutional Research</u> (IR) is the main provider of data at Shepherd. IR combines data as regularly reported to the WV-HEPC with data from Shepherd's internal Banner system and other internal data as necessary for analysis and reporting purposes. IR reporting and data analysis follow standard reporting guidelines from IPEDS, the Common Data Set, and other such external entities; IPEDS definitions and

methodologies are used, when possible, per accepted best practice. Commonly requested information is posted on the IR website, along with federally mandated information (see above). IR works with internal data requestors to ensure that authorized persons receive the most useful and appropriate data for their needs, while maintaining the integrity and accuracy of the reported information; the office also provides explanation and education about the data it provides, and advises on data collection, use, and availability. The Director of Institutional Research participates in WV-HEPC statewide data conferences and initiatives and is consulted regarding proposed WV-HEPC data initiatives.

Shepherd utilizes a variety of assessments and processes to improve institutional effectiveness and student retention. These include program review, faculty annual evaluations, promotion and tenure, and student course evaluation. Data collection and reporting is provided to and utilized by Shepherd through national and federal organizations (IPEDS, Department of Education), and state organizations such as the WV-HEPC. The use of comparative data allows Shepherd to formulate performance benchmarks related to operational and academic outcomes.

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Criterion 3 - Summary

The institution demonstrates responsibility for the quality of its educational programs, learning environments and support services, and it evaluates their effectiveness in fulfilling its mission. The rigor and quality of each educational program is consistent regardless of modality, location or other differentiating factors.

Argument

Shepherd maintains the quality of its educational experiences through clear and high standards for its instructional offerings, regardless of modality or location of delivery. The program review process, articulation agreements, and the work of departmental and University committees such as the Core Curriculum Committee, the Curriculum and Instruction Committee, and Graduate Council ensure that all Shepherd students receive a high-quality education. Additional input from internal and external stakeholders, coupled with internal policies and procedures, assures appropriateness, quality, relevance, and currency of program offerings.

The Core Curriculum, Shepherd's general education program, is built upon LEAP student outcomes that emphasize the importance of respect for people holding a range of cultural values. It links to the major through the first-year experience, writing intensive courses within the major, and an integrative learning experience in the capstone. Through this strong linkage, students demonstrate competencies and outcomes both in general education and specific knowledge within the major at ever-higher levels, culminating in the capstone experience.

Shepherd's faculty and staff are qualified and capable. Full-time and part-time faculty are required to remain current in their fields, as evidenced through guidelines in the hiring process and policies in the faculty handbook; support for professional development is available, and faculty are regularly evaluated. Faculty members also participate and mentor students in their creative work and the discovery of knowledge.

The University takes great pride in its student support services. These services work to support the whole student, providing both academic and extracurricular assistance, while recognizing the many difficulties students face while pursuing their degrees. Students are guided and advised throughout their time at Shepherd, and are also provided with technology support such as wireless access, computer labs, scientific libraries, clinical placements, instrument collections, performance venues, and visual art resources. The staff who provide these crucial support services are appropriately qualified, trained, and assisted in their professional development.

Shepherd's dedication to provision of quality education for all is evidenced through continuous assessment and quality improvement processes. Assessment is an integral part of all University operations; all units participate in formal assessment processes, including regular evaluation and reporting, with an expectation of "closing the loop" through implementation of improvements resulting from the assessment process.

Curricular quality is assessed and maintained through the program review process, evaluation of prior-learning credit, and careful monitoring of the content and rigor of curricula. New and changing programs and courses must pass a rigorous review process before approval. Oversight of curricular quality is handled by committees and bodies at multiple levels, and also involves external stakeholders and programmatic accreditation as appropriate. Dual enrollment students, lifelong-learning students, and other non-degree students receive the same high-quality education and are held to the same standards as degree-seeking students.

Continuous analysis of University enrollment, retention, persistence, and completion is vital, not only to student outcomes, but to institutional operations. Shepherd analyzes data and sets realistic, attainable, and ambitious goals with an eye toward the constantly evolving higher education environment and the needs of the local community. The University also remains responsive to the higher education environment and the community, and works to identify and implement needed changes and adjustments as circumstances dictate. Student outcomes are tracked through licensure test pass rates, alumni feedback, social media, and other methods, and inform curricular and institutional improvements.

Sources

There are no sources.

4 - Sustainability: Institutional Effectiveness, Resources and Planning

The institution's resources, structures, policies, procedures and planning enable it to fulfill its mission, improve the quality of its educational programs, and respond to future challenges and opportunities.

4.A Effective Administrative Structures

The institution's administrative structures are effective and facilitate collaborative processes such as shared governance; data-informed decision making; and engagement with internal and external constituencies as appropriate.

Argument

Introduction

Shepherd University's organizational structure and guiding policies enable involvement of internal and external stakeholders at many levels of University operations. Through shared governance, Shepherd's institutional structure allows students, faculty, staff, and the community to assist in establishing strategic priorities and directions for the institution, to participate in the decision-making process, and to collaborate in decisions regarding the academic enterprise of the University.

Shepherd engages its internal constituencies through shared governance whenever possible and appropriate. University governance is designed to enable and streamline effective information flow and the governance process.

- As described in Core Component 2B, the Board of Governors (BoG) <u>includes</u> a faculty member, a student, and a member of the classified staff.
- The President meets weekly with the <u>Executive Leadership Team</u> (ELT) for the discussion and execution of major issues, policies, and initiatives.
- The <u>senior academic leadership group</u> brings together college and academic program deans and other leaders for the discussion and execution of major academic issues, policies, and initiatives.

Shared governance is also supported through a variety of bodies defined by state law or the <u>University Constitution</u>, including the <u>Faculty Senate</u>, <u>Classified Employees Council</u>, <u>Student Government Association</u>, and the <u>University Assembly</u>. Each group meets regularly to discuss institutional and unit issues, development and implementation of policy, and provisions contained in relevant governing documents. University Assembly meetings bring the faculty and staff together for campuswide discussions on a semesterly basis. These groups maintain webpages that detail their responsibilities and enable transparency through posted organizational documents such as minutes and organization constitutions.

The University ensures that committees include as wide a range of representation from stakeholder groups as feasible. For example, students, staff, and faculty sit not only on the BoG, but also on the Budget Advisory Council, the Strategic Planning Committee, Student Life Council, other constitutionally mandated committees, and some search committees. Responding to significant faculty and staff concerns captured by campuswide employee surveys, the University President created a Great Colleges to Work For Committee (reporting directly to the President) in order to address those concerns.

Shepherd embraces data-driven, collaborative decision-making that uses results to facilitate continued growth and goal achievement. Assessment data are used to drive planning and decision-making (see Core Component 3E). Established policies and procedures facilitate assessment and data analysis that support continued productivity, growth, and excellence.

Shepherd uses historical and current information and process and performance data to develop and modify programs and operations. Each year's proposed University budget is based on closely tracked projections of enrollment, personnel expenses, capital expenses, and other anticipated revenues and expenses. Proposed increases in tuition and fees balance competitive rates with operational needs. Diligent oversight of enrollment and its impact on revenues, careful allocation of resources, and revisions to the budget in response to changes in state appropriations or variations in enrollment have allowed Shepherd to continue to fulfill its mission.

Data sources include, but are not limited to: internal strategic indicators guided by the Strategic Plan; the West Virginia Higher Education Policy Commission (WV-HEPC) Almanac (and its predecessor, the Report Card) which includes data from public institutions across the state; the IPEDS Data Feedback Report, which provides useful summary peer-comparison data; and the annual report of Campus Services, which identifies departmental financial efficiencies as well as outcomes for key results indicators such as average course materials cost by section, occupancy rates by community, and dining participation rates. Shepherd also participated in the Delaware Cost Study (until its discontinuation by the survey sponsors as of December 2025), and participates in the National Survey of Student Engagement, and the Great Colleges to Work For Program; these all provide (or provided) valuable data on program costs, student engagement, and employee experiences.

Shepherd benchmarks itself against regional and national groups of peer institutions such as the American Association of Colleges and Universities (of which Shepherd is a member), other West Virginia public institutions, and a group of statistically similar institutions as determined by the WV-HEPC. These comparisons are used when analyzing and presenting results from across the institution in documents such as the *Transforming Our Future* key performance indicators. Shepherd also uses them for national comparisons via the annual IPEDS Data Feedback Report and other IPEDS data as needed.

Individual areas collect and use internal data as well, as described throughout this document. The annual Academic Affairs Dataset informs planning and decision-making. Enrollment Management monitors enrollment and admissions data and enrollment projections (discussed in Core Component 3G). Student Affairs collects data on student involvement, academic performance, and areas of need to connect students with resources appropriate to their situations (also in Core Component 3G). Finance tracks revenues and expenditures to monitor the University budget and recommend budget adjustments as

needed (see the following Core Component for more details). Campus Services balances financial performance with projections of revenues based on predicted usage rates and demands on resources, and conducts studies involving surveys, focus groups, and market analysis to inform decision-making.

Involvement of varied stakeholders in campus processes ensures not only inclusion of a range of perspectives, but consideration of relevant information from all areas. For example, capital projects require approval by the Executive Leadership Team (ELT), which includes representation from all areas of campus. During project implementation, continuous feedback between contractors, the project manager, and the University ensures that relevant information is considered on an ongoing basis to optimize project outcomes. Community feedback is solicited as appropriate (see Core Component 4C) and informs the project further. This helps to ensure that decisions are based on the best available information from all involved.

Shepherd involves its constituents in creating academic requirements and processes through its organizational and governance structure. As part of its duties, the BoG's Academic Programs and Development Committee considers new program proposals that require Board approval (see Core Component 2C), as well as program reviews and recommendations for program improvement or closure (see Core Component 3F). Standing committees of the Faculty Senate such as the Admissions and Credits Committee, the Curriculum and Instruction Committee, and the Core Curriculum Committee oversee the development and supervision of undergraduate curriculum and academic policy. The Graduate Council approves curricular changes at the graduate level. Faculty are also members of programmatic advisory boards (discussed in Core Component 3B), which include representation from various internal and external constituencies to provide comprehensive perspectives on curricula.

Student Affairs collaborates on academic policy and processes through involvement on committees such as the Handbook Committee (responsible for the Student Handbook), the Technology Oversight Committee, and the Student Success Committee. Additional governance structures involved in setting academic requirements include the Honors Advisory Board for the Honors Program and the Educator Preparation Program Council (EPPC) for Shepherd's teacher education programs. The Director of Residence Life meets with the Resident Assistants and Hall Directors to review various policies and outcomes including the University Code of Conduct as they relate to the residence halls to gain information about needed revisions; these changes are then shared with the Dean of Students and the Student Life Council. The Business Process team, an ad-hoc group of cross-Divisional staff members and a faculty representative, meet on a bi-weekly basis to review policies and procedures which impact student success and employee workload. An example outcome has been creating a "fast-track" program for automatically re-adding classes to students whose courses were dropped for non-payment once payment is made. Cross-departmental communication enables this initiative. Committees and other governance groups work together to ensure broad participation in decision-making; for example, Campus Services presents planned room and board rate increases not only to the BoG Finance Committee, but also to the Budget Advisory Committee and the Student Government Association, for discussion and feedback prior to final approval by the BoG. The AVP of Campus Services, working with data supplied by the Bookstore, engages with Deans, Chairs, and a select group of identified faculty to drive targeted faculty textbook adoptions targets to reduce course materials expenses.

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4.B Resource Base and Sustainability

The institution's financial and personnel resources effectively support its current operations. The institution's financial management balances short-term needs with long-term commitments and ensures its ongoing sustainability.

Argument

Shepherd's mission, vision, core values, and planning documents reflect a comprehensive understanding of the University's function, resources, community, and opportunities. The goals contained in these documents are similarly rooted in a realistic assessment of the University's position, and strive to realize institutional aspirations while acknowledging necessary constraints.

Interwoven mission, vision, and core values, as well as the strategic plan, campus master plan, and other planning documents ensure continuous feedback linking vision, planning, and implementation. Shepherd embraces the theme of *ONEShepherd: One Mission. One Vision. One Voice*.

- The <u>five goals</u> of the *Transforming Our Future* strategic plan operationalize the University's mission, vision, and core values, with specific strategies for achievement of the University vision. These are built on and informed by results from previous strategic plans.
- Strategic planning strategies and their goals are based on <u>careful analysis</u> of the University's environment and institutional strengths, weaknesses, opportunities, and challenges over short and long timeframes, and are designed to advance the University's realistic progress toward achievement of its vision.
- Progress toward strategic plan goals is regularly assessed; <u>assessment results</u> illuminate new and changing challenges, and <u>inform adjustments</u> to planning goals.
- Unit and instructional planning similarly are built upon resource assessment and aspirational goals, and continuous assessment provides up-to-date information on resources and performance; goals are adjusted as necessary.
- Processes, policies, and actions as evidenced in BoG, committee, and other procedural documentation demonstrate that the University considers available resources (financial, human, and otherwise) in deliberation and decision-making throughout planning and implementation.

Implementation of strategic priorities in support of Shepherd's mission and vision requires funding. Peer groups are used to ensure funding levels are appropriate. Enhancement of student services remains a top priority; improving faculty and staff compensation is also recognized as an important need. Shepherd considers availability of instructional and support resources when creating and modifying degree programs. Oversight by departmental, college and institutional committees and the BoG (see processes discussed in numerous Core Components), as well as by programmatic accreditors and the HLC, ensures thoughtful and optimal allocation of available resources. In recent years, the BoG has made special exceptions to its budget-control guidelines to allocate funding toward

critical, high-impact recruitment and enrollment initiatives. These initiatives not only support institutional health through improved recruitment and retention but allow the University to better fulfill its stated goals.

The Crossroads strategic plan (2009-2013) worked toward the vision of becoming a premier public liberal arts university, and the Currents strategic plan (2014-2017) built upon the previous plan; the Transforming Our Future strategic plan (2018-2023) reflected the University's commitment toward translating COPLAC principles into curricular outcomes. With Shepherd's shift to AAC&U membership, the current strategic plan Transforming Our Future (2023–2028) champions a comprehensive approach to liberal arts exceptionalism, upholding our longtime ideals of civic engagement and leadership, lifelong learning, opportunity, innovation, and welcoming services. The strategic planning process includes implementation plans for each pathway as well as regular progress reports. All planning documents such as the institutional strategic plan, master plan, and Compact (through 2018) are forwarded to the BoG for approval. Departments, programs and other units align their goals and strategies with those of the University, ensuring the alignment of priorities with the allocation of resources in concert with University strategic goals.

Institutional Capacity

The Office of Finance and Administration, in conjunction with the President, the Executive Leadership Team, and the Board of Governors (BoG) Audit and Finance Committee, monitors and is responsible for the fiscal health of the University. Audited financial statements are prepared annually and are posted on the Finance webpage; quarterly financial updates are presented to the BoG. Monthly financial statements are provided to the Executive Leadership Team (ELT) for review and discussion at ELT meetings. These documents are also available to the public on the University Finance website.

Shepherd monitors expenses carefully. Annual updates to the HLC and additional financial reports show institutional ratios "above the zone"; these have typically been affected by variances in liabilities for Other Post-Employment Benefits (OPEB), increases in Tuition and Fee revenue, and cash on hand. Additionally, the Composite Financial Index (CFI) reported for FY2024 represents a significant improvement, resulting from increased revenue (after years of declines) combined with an effective and targeted approach to reduce operational expenses.

In FY2025, Shepherd's base legislative appropriation increased by approximately 25%, to provide better state-wide equity. FY2026 will result in a 1.5% decrease in the state appropriation ($190,000). With new administrations at both the state and federal levels, the University will continue to monitor and adjust accordingly as the landscape changes.

Despite a slight increase in Tuition and Fees, approved by the Board in February 2025, Shepherd's tuition and fees remain competitive when compared to other institutions in the state and within the quad-state region.

Shepherd's budgeting processes ensure closely monitored, cost-effective, and efficient spending. Finance staff work with enrollment forecasts from Enrollment Management and input from other members of the Executive Leadership Team to arrive at targeted revenue numbers on which to build the operations and capital budgets. The Finance staff also work with department heads to forecast potential upcoming operational costs that are important to

the planning process. This approach has proven to be an effective method to improve operational results, including our cash position.

During the academic year, budgeting priorities for the coming year are reviewed on a rolling basis by the Executive Leadership Team as operational needs dictate, and the Budget Advisory Council discusses changes to student fees. Proposed tuition and fees for the coming year are presented to the Board of Governors for approval in February to allow for projected fee revenues to be considered in the budgeting process. Final budget allocations are made once data-driven enrollment projections are available for the coming year, and the final budget is presented by the Vice President for Finance and Administration to the Board of Governors (BoG) at the June meeting prior to the fiscal year.

Requests for funding for new academic initiatives are reviewed at multiple levels before being brought forward for consideration by the Executive Leadership Team. Shepherd considers the availability of academic and support resources required when developing new degree programs. New program proposals are created by departments and then vetted at successively higher levels before final approval by the BoG. Capital projects are prioritized by need, and then funding sources are determined.

The budgeting process involves representation from all parts of campus. This assists in verifying assumptions of the annual planning process, and provides for development of multiple scenarios based on anticipated fluctuations in revenue. Extensive data on factors and phenomena affecting the budget are collected, as described here.

Monitoring of institutional finances and expenditures is an ongoing process. All spending is conducted by authorized unit buyers and monitored by unit budget managers; unit funds are reallocated as needed to cover purchasing, and requests for funding to cover unanticipated needs, such as equipment failure or reallocation of personnel duties, are considered as they arise. Each month, Finance reviews institutional spending and payroll, and monitors and takes action to address issues that may arise, such as changes to utilities spending. Before each quarterly BoG Finance Committee meeting, Finance reviews unanticipated variances and prepares "budget to actual" comparisons and proposed budget adjustments and actions, for review and approval by the BoG. Dashboard presentations also help to keep the BoG abreast of long-term financial performance and trends. Recently the Finance office has developed new reporting tools that report financial information more efficiently and effectively, both internally and to the Board.

Continuous change to the higher education landscape necessitates careful monitoring of institutional finances. Prior to the September 2023 BoG meeting, the Vice President for Finance expressed concerns to the BoG Finance Committee regarding multiple years of growing operating deficits due to declining enrollment. The Finance Committee, in conjunction with the University leadership, identified spending reductions. The University completed both an Academic Prioritization (November 2023) and an Administrative Prioritization (January 2025).

As stated in the Strategic Plan's introduction, "Planning processes must strive to manage existing financial resources effectively, while working to develop new campus-based and external revenues. Goals must remain realistic in the face of resource limitations, while still allowing for ambition and growth. This will ensure that the institution can sustain its long-term strategic vision to serve as a premier public liberal arts university that successfully

supports student learning." Given current trends in higher education, maintaining financial stability and instructional quality are Shepherd's top priorities.

Instruction, academic support services, student services, and financial aid remain a fiscal priority at a combined percentage of over 44.8% of the FY2025 operating budget; inclusion of auxiliary services expenses raises the percentage to roughly 67.8%. For FY2025, the following percentages and dollar amounts represent actual expenses aligned with operation of the educational enterprise:

Operating Expenses	FY25	
Instruction	$15,540,403	28.79%
Academic Support	$2,740,021	5.08%
Student Services	$3,998,596	7.41%
Student Financial Aid	$1,916,073	3.55%
Auxiliary Enterprises	$12,398,365	22.97%

Expenditures for student financial aid have nearly halved, from $3.2M in FY2020 to $1.9M in FY2025; this has been more than offset by an increase in auxiliary expenses, from $8.95M in FY2021 to $12.4M in FY 2025. The ongoing inflationary pressure on operating expenses and the deferred maintenance on buildings that require investment has contributed to the rise in costs.

Planning is key to optimizing resource allocation to remain viable, competitive, and successful. Careful monitoring of revenues and expenses is necessary to maintain the quality of the educational experience while providing a safe and healthy environment for students, faculty, and staff. Enrollment initiatives are actively pursued, with new marketing strategies and greater geographic reach, to attract quality students that will succeed at Shepherd (see Core Component 4C). Planned reductions of operating expenses in areas such as energy costs, communication, personnel, and service contracts are balancing out the overall cost increases seen in other areas.

Increased pursuit of funding from external sources has proven successful. The Office of Sponsored Programs works with faculty and staff to obtain and manage grant awards; the total current value of all FY2026 grants (including active, awarded, and/or closed) is over $37 million. Shepherd University's newly staffed Development and Annual Giving department has had great success not only in initiating more targeted projects, but also in creating a large-scale Development and Annual Giving Plan. Support for development of research and economic development initiatives is provided by the Shepherd Entrepreneurship and Research Corporation, which also maintains 501(c)3 status (SERC; discussed more in Core Component 4C).

New capital projects are planned with an attention to efficient use of resources. Shepherd is currently constructing a new Dining Hall and Multipurpose Building on West Campus to provide students with a full-service state-of-the-art dining facility near the Residence Halls. Additional deferred maintenance of facilities will be addressed through Guaranteed Energy Savings Contracts.

Human Resources

In conjunction with other divisions, the <u>Office of Human Resources</u> assists in monitoring and evaluating the personnel needs of the University. Human Resources also monitors compliance with federal and state equal opportunity and nondiscrimination laws and regulations, oversees evaluation of staff, provides new staff orientation, facilitates staff training and development, ensures employee handbooks are current and readily available, trains search committee members, and manages employee benefits.

In Fall 2025, Shepherd University employed 111 full-time instructional faculty. 69 (62.2%) were tenured, 27 (24.3%) were tenure-track, and 15 (13.5%) were term faculty (lecturers, clinical faculty, or visiting faculty). The number of casual and temporary employees varies but (as of December 1, 2025) stood at 81. Shepherd faculty and staff are hired through a well-defined and rigorous process, and are regularly evaluated and provided with opportunities and resources for professional development (see Core Component 3C). All new instructional faculty submit documentation to begin their permanent personnel file; this includes official verification of educational qualifications, official certification of additional credits earned, and a personnel record. Employees are trained in Shepherd <u>policies and procedures</u> as appropriate and necessary for their positions. For example, <u>supervisors receive training</u> in hiring processes, leave management, performance management, and other areas, while employees of public-facing offices receive customer service training and search committee members receive mandatory training. Employees are encouraged to pursue professional development whenever possible. Shepherd also encourages peer-to-peer training and education; topics have included how to better support student-veterans, respond to an active-shooter situation, and practice self-care and mindfulness.

Staffing in the various areas of the institution is constantly evaluated and adjusted to optimize use of staff resources while maintaining delivery of services. Faculty lines are evaluated by the Provost/VPAA and Provost Council; staff lines are evaluated by the Executive Leadership Team.

Faculty are evaluated annually through a <u>multi-dimensional process</u> assessing teaching, professional development, and service. All Shepherd staff <u>are evaluated annually</u> on multiple competencies, through self-evaluation and by the supervisor. The staff member and supervisor also collaborate on setting SMART (specific, measurable, achievable, relevant and time-bound) goals and evaluating progress toward those goals; goals may include specific work tasks, professional development, or other objectives. Staff receiving low ratings in one or more competencies or goals receive Performance Improvement Plans with specific objectives and timeframes, and must sustain the resulting improvement over time.

Physical and Technological Resources

Facilities

Shepherd's campus covers 323 acres, bordered by the Potomac River on the east, and contains five outdoor fields and forty-seven buildings on East and West Campus):

- Thirteen academic buildings (395,666 square feet)
- Five administrative buildings (75,430 square feet)
- Seven historical buildings (14,980 square feet)
- Fourteen residence halls (428,590 square feet)

- Five athletic buildings (98,895 square feet)
- Three auxiliary buildings (146,960 square feet)

(The Shepherd University Agricultural Innovation Center (SUAIC) includes five additional single-story buildings.)

The Facilities Director supervises skilled technicians, groundskeepers, and custodial staff, and works closely with the Executive Leadership Team on annual planning for capital projects and long-range planning detailed in documents such as the institutional strategic plan, campus master plan, and capital priorities lists. Project priorities are influenced by factors such as cost impact to utilities, protection of building envelopes, improvements to life/safety, and needed support to programs that advance the mission of the University. Facilities staff are appropriately licensed to oversee assigned areas such as environmental health and safety, project management, and skilled trades.

Technology

Information Technology Services (ITS) supports campus use of information technology, overseeing infrastructure, services and operations, project and initiative management, application creation and programming, telephony, and affiliated audio-visual and additional technological needs. ITS's professional staff support the collective needs of faculty, students, and staff members. A detailed list of policies and procedures can be found on their webpages.

The range of IT services includes, but is not limited to:

- Administration, management, and quality control of Banner, the core Enterprise Resource Planning (ERP) and Student Information System (SIS), and all affiliated programming needs that pertain to necessary data integrity, data views and/or sets, and queries/reports for Admissions, Financial Aid, Registrar, and Finance via multiple tools and integrations.
- Administration, security, and quality control of infrastructural needs across two separate data centers; managing all network access, along with email generation for all faculty, students, and staff.
- Administration of various cloud infrastructural services and applications.
- Provision and administration of IT services and classroom technology support on campus and in remote settings with remote accessibility.
- Management of all telephony related needs on campus, including support for emergency services (e.g. fire alarm notifications).
- Oversight of 22 computer labs with a total of 338 computers across campus for student use.
- Administration and management of Internet access, along with WiFi across campus via over 660 access points.
- Administration and management of all affiliated software utilized for distribution on campus, including Microsoft Office, Adobe Creative Cloud, IBM SPSS, Mathlab, Argos, and others.
- Administration and management of remote access into internal systems through a virtual presence (VDI) leveraging Citrix for faculty, students, and staff, allowing full access to lab and employee software within a virtual environment from off-campus locations.

Investments in IT

Shepherd has made <u>considerable investment</u> in the network infrastructure. In 2024, the core network, edge switches, and WiFi access points were replaced across campus. Student WiFi, in particular, was improved, and access to the RamNet wireless network was streamlined for all users. WiFi coverage was extended to previously low coverage areas, including some outdoor spaces. Fiber was replaced in some areas, enabling us to bring 10 GB interconnects to each building. In addition, the University transitioned from a 1 GB internet circuit to two 10 GB circuits, providing much improved connectivity for the campus community.

The University is currently completing work to connect the University to Internet2, which has been funded by an NSF grant of over $630k. This work is expected to be nearly complete by mid-2026 and will provide significant research opportunities for faculty and students.

Shepherd has also enhanced network connectivity in Snyder and Byrd Science buildings to enable 5 GB to the desktop in select labs and improved data transfer and storage. This work was funded by a $135k DOE Cyberinfrastructure grant. This upgrade will enhance the learning experience in these specialized labs that require higher speed data transfers and connectivity.

The institution has invested significant time and resources to update critical security infrastructure, policies, and processes. MFA was enabled for Office365 in 2024 and for Banner and DegreeWorks in 2025, securing three of our most critical resources. A comprehensive review of network infrastructure security was undertaken in 2024 with the installation of the new network infrastructure. Security policies are reviewed at least yearly, and in 2025 Shepherd engaged a security consultant to provide additional recommendations for improvement. This partnership resulted in a more in-depth risk assessment with recommendations and several new or updated policies and procedures.

In 2024, IT began a comprehensive cybersecurity training program for employees using Proofpoint tools and materials. This training includes frequent phishing simulations as well as training on data handling and GLBA requirements.

In 2023, the University established a disaster recovery site for Banner. This was implemented via Oracle Data Guard, which replicates our Banner database to Phoenix. In fiscal years 2023, 2024, and 2025, Banner uptime exceeded 99.99%.

Non-financial resources also influence planning. For instance, Shepherd's location and community provide excellent opportunities and resources for education and involvement. The University's proximity to two major metropolitan areas provides many opportunities for experiential learning, employment, and programming to broaden student professional and cultural knowledge, experience, and engagement, as well as accomplished and knowledgeable professionals to provide focused instruction in specific areas (such as applied music lessons and business classes). Community members readily work with the University on initiatives small and large. Opportunities for student networking include the School of Nursing's Research Day, the College of Business's hosting of <u>Bridging Innovation Week</u> (BIW), and the <u>Stubblefield Institute for Civil Political Discourse's</u> regular panels and discussions. As part of BIW, students competed in the <u>West Virginia Innovation + Business Model Competition</u> (WVIBMC), placing in two of three top spots. As many community

members have lived and worked in Washington D.C. and/or Baltimore, MD, students are provided with access to world-class experience and expertise at minimal or no cost, while community members meet students and become more engaged with the University.

Despite many years of decreases (or, recently, very moderate increases) in student enrollment, the increasingly challenging higher-education environment, and the unpredictability of state funding, Shepherd continues to provide a high-quality education at an affordable cost to its community while working to achieve its goals. University successes are described throughout this document, and testify to the efficacy of institutional planning and operations. Guided by its mission, vision, and core values, the University has adapted to change while seeking out new opportunities. The University continues to be guided by its mission, vision, core values, and planning documents as it moves forward. Despite current challenges, Shepherd continues to define and communicate its identity, maintain and improve the student experience, encourage employee collaboration and excellence, and protect and grow the campus and institutional infrastructure. While the higher education environment remains uncertain, the University has demonstrated its willingness and ability to be a good steward of its resources.

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4.C Planning for Quality Improvement

The institution engages in systematic strategic planning for quality improvement. It relies on data, integrating its insights from enrollment forecasts, financial capacity, student learning assessment, institutional operations and the external environment.

Argument

Introduction

The quality, viability, and sustainability of Shepherd's educational programs are maintained and strengthened by the institution's operations and planning processes, coupled with its commitment to continuous improvement. Management, support, and oversight of fiscal, capital, and human resources are shared by both academic and administrative units at the institution, including the Board of Governors (BoG). Planning and budget processes are participatory, with input solicited at multiple levels.

Shepherd's planning and budget processes are structured to align with the Strategic Plan. Curricular evaluations dictate assessment goals used in the formal assessment process (see Core Component 3E), and academic program planning documents are a crucial part of proposals for new programs and the program review process (see Core Component 3F). These plans, along with budget projections from the Vice President of Finance and Administration, in consultation with the President and the Executive Leadership Team, clearly outline financial allocations for the coming year. Budget planning is a deliberative process, aligning funding with strategic priorities; involvement of individuals at multiple administrative levels allows for University-wide input into the process, while simultaneously using the institutional mission and strategic plan as a filter for request prioritization.

The Campus Master Plan also aligns the allocation of capital expenditures with mission and strategic priorities through 2024 and beyond. For example, the second volume of the Master Plan defines annual investments (capital allocations), use of state-funded bonded infrastructure, external partnerships, and use of reserves for implementation of the plan, which includes not only new structures, but also repurposing of traditional academic buildings.

Major organizational initiatives, such as academic restructuring, the Shepherd Entrepreneurship and Research Corporation (SERC), and the East Campus Loop project (all discussed below) are planned and authorized based on relevance to the campus strategic plan and master plan, financial feasibility, and projected benefits to the educational enterprise as well as to the community, in service of the University mission. Community needs are also addressed in allocation of financial and instructional resources toward new academic programs; new program proposals must document those needs and the ways in which the proposed program would address them.

As described above, Shepherd fosters strong linkages between vision, planning, and implementation processes. Planning, resource allocation, and operational and educational assessment inform each other and ensure that the University progresses toward

achievement of its goals.

Shepherd utilizes evidence as a basis for improvement, including institutional statewide metrics, as well as national peer comparisons and IPEDS data (see Core Component 3G). In recent years, Shepherd has invested heavily in systems to integrate, share, and apply information on student outcomes and institutional and operational performance. This investment allows for coordination of planning, budgeting, and assessment of operations and student success.

Assessment of student learning and education operations is linked to the planning and budgeting process via Academic Affairs. Indicators such as enrollment, faculty productivity, and student achievement are provided through data from Institutional Research and other offices, and support academic planning at all levels. All academic programs utilize these data as part of the framework for evaluation in the West Virginia Higher Education Policy Commission five-year program review cycle (Core Component 3F describes the evolution of this process), as well as additional metrics as appropriate and needed.

In non-academic areas, evaluation of operations are integrated into the planning and budgeting processes; the outcomes presented in the Campus Services FY 2025 report serve as a recent example. Results of the regular unit assessment cycle, and ongoing evaluation of activities and events, provide valuable feedback that guides both planning and budgeting; initiatives are begun, adjusted, or discontinued, and resources are reallocated based on proven need. Data from external initiatives such as the Great Colleges to Work For Program and the National Survey of Student Engagement (NSSE) also inform planning and allocation.

University Strategic Planning Processes

The strategic plan is always a primary consideration when prioritizing allocations. Nevertheless, work continues on improvement of the day-to-day operational use of the strategic plan, through the ongoing progress reports of those designated as accountable and responsible for specific tactics, and through ongoing assessment of unit-level operations. Shepherd is working toward use of the strategic plan as a continual reference point in budgeting and other University processes. Shepherd's strategic planning process is thorough and collaborative. The Strategic Planning Committee most recently enacted included faculty, staff, and students (with the committee co-chairs regularly meeting with a liaison from the Board of Governors), ensuring comprehensive representation from all stakeholder groups. As discussed in Core Component 1A, creation of the successor to the prior strategic plan began before that plan's conclusion, with analysis of the effectiveness and outcomes of the prior plan and evaluation of the current and projected higher education environment conducted by the committee as a whole. The resulting plan was presented to the campus community for specific input before final Board approval in September 2023.

Shepherd's strategic plan is operationalized and assessed by the Strategic Plan Implementation Teams, composed of individuals from various areas of campus. Progress toward goal completion is tracked regularly, and each strategic goal is assessed regularly by the Executive Leadership Team to gauge outcomes related to activities that support strategic priorities.

Shepherd prides itself on its excellent relationship with the local community, and involves

community members in committees, initiatives, and decision-making whenever possible. Initiatives such as mutual aid agreements between the Shepherd University Police Department and local municipalities, community service projects, Relay for Life, and Shepherd representation on local committees keep these bonds strong and active. The campus and community have provided input for the East Campus Loop project, intended to repurpose idle property on East Campus.

Planning processes at Shepherd involve the entire institution and incorporate representatives from all areas of the Shepherd community. Numerous areas of the University provide information and/or projections to support institution-wide planning:

- Enrollment Management monitors enrollment and admissions data and provides enrollment projections and plans for student recruitment and retention (see Core Component 3G). The numbers and demographics of Shepherd students inform budgeting and planning for all other areas of the University.
- Finance provides current and projected financial information, which is reviewed by the Finance Committee and Board of Governors quarterly. Revisions to the budget are implemented should there be substantive changes in enrollment or other factors.
- The Office of Sponsored Programs provides information on current and in-progress grants.
- Human Resources distributes information on faculty and staff positions, as well as projected costs for benefits and the impact of any state-based benefit reforms.
- Campus Services tracks usage of and satisfaction with its services. In conjunction with the 2024 housing market study, deferred maintenance in residential buildings was evaluated to help form a timeline for renovations to coincide with updated facilities master planning.
- Academic Affairs provides general data on instructional activity and resources, and works with individual departments to evaluate faculty resources, re-allotment of positions, and requests for new positions based on the unit's planning document(s) and the program review process.

These data provide a holistic view of the University that allows for comprehensive planning processes that balance the needs of its various parts as far as possible.

West Virginia Higher Education Policy Commission (WV-HEPC)

Through 2018, WV-HEPC implemented a statutory mandate for the maintenance of an Institutional Compact for Shepherd and all public universities. The Compact contained five-year goals for benchmarks centered around three focus areas (Access, Success, and Impact), as well as metrics for enrollment, retention and graduation, and other indicators. Institutions worked with the WV-HEPC to define goals, and provided annual updates to the WV-HEPC on progress toward those goals. The goals of the last Compact document aligned well with the strategies in the *Currents* strategic plan (which was in effect when the most recent Compact was written in 2014). The state discontinued the Compact process in 2019. Currently, both Shepherd and the WV-HEPC monitor Shepherd's performance through regular data reporting and outcomes in the Higher Education Almanac. Administrators such as the President, VP for Academic Affairs, VP for Administration and Finance, General Counsel, and Associate Vice President for institutional Effectiveness participate in Commission meetings to pass on critical information regarding state funding and performance expectations to the campus.

WV-HEPC Series 12 requires each higher education institution to file capital funding priorities with the Commission annually, so as to identify to the Commission the capital projects that the University seeks to pursue during the next two years as funds are available. The Commission may receive direct appropriations from the legislature to fund capital priorities, or the Commission may receive authorization to issue additional capital bonds. In either event, the University's list is integrated with lists from all other institutions by the Commission to establish statewide priorities for funding projects.

The WV-HEPC continues to work for improved and coordinated system-wide planning. West Virginia institutions are encouraged to work toward the West Virginia CLIMB goal of 60% of West Virginians with a certificate or degree by 2030. Shepherd continues to strive for this statewide goal by welcoming all eligible students and working to address financial aid and comprehensive support needs for under resourced students through the Student Success Academy, Student Academic Enrichment, and Financial Aid office. Additionally, faculty and staff work closely with the Office of Sponsored Programs to secure external funding for scholarships and programming for students. Shepherd has been awarded a HRSA grant to support Doctor of Nurse Practitioner (DNP) students with academic scholarships, as well as a grant to increase Computer, Mathematics, and Engineering enrollment and persistence, utilizing scholarships, academic interventions and engaging learning opportunities with funds from NSF.

Student Enrollment and Demographics

Many institutions have experienced declines in undergraduate degree-seeking enrollment in recent years; Shepherd has modestly improved enrollment over the four year period (Fall 2020 – Fall 2024). As the composition of the Shepherd student body changes, frequent monitoring of enrollment changes informs institution-wide planning and provides vital information for budgeting and revenue projections. Weekly enrollment reports are provided to the Executive Leadership Team by Enrollment Management, which inform its decisions; the BoG also receives regular enrollment reports, which inform its own decisions (as discussed in Core Component 3G).

The demographics of Shepherd's student body are ever-changing. Growth in enrollments of adult students, high school (dual enrollment) students, and in other demographics results in additional need for student support and services targeted to those populations. Careful monitoring of these trends ensures that all Shepherd students can receive the instruction and support they need. Many of these support services are described in detail in other sections of this Assurance Argument, and are summarized below.

Disadvantaged Students

Shepherd has a wide array of support services and initiatives targeted toward students with academic and other challenges. Supplemental academic support such as TRIO Student Support Services (SSS), the Shepherd Success Academy (SSA), and other initiatives help students to succeed at the college level. The Global Student Leadership Team provides culturally competent experiences for the campus community at large.

Adult Students, Veterans, and Accessibility

Adult students have access to flexible course scheduling and delivery options, as well as extended hours of operation for critical offices. Student-veterans have dedicated lounge

space, support services, and initiatives. Accessibility Services provides academic and housing accommodations to students in need of them.

Dual Enrollment

Shepherd has a <u>robust</u> dual enrollment program, <u>collaborating</u> with public schools in Shepherd's home and contiguous counties in West Virginia as well as with numerous private schools in the region. <u>Courses are offered</u> in the arts, humanities, natural and social sciences, and business. Enrollment growth continues to be strong. Fall 2025 enrollment shows a 144.9% increase since Fall 2021, and continued annual increases demonstrate sustained growth. <u>Statewide data</u> show that Shepherd has strong conversion rates of students from dual enrollment to undergraduate public four-year-or-above institutions when compared to WV peers.

Distance Education

Demographic changes like growth in enrollments of adult and working students require flexibility in curricular offerings and scheduling. As discussed in Core Component 1C, Shepherd has expanded its online and distance offerings to attract and retain both its traditional student population and populations such as adult learners, working adults, graduate students, and students unable to attend in-person classes. Based on student demand, Shepherd <u>offers</u> the Master's of Business Administration program fully online, with four concentrations also available online; these are accredited by the International Accreditation Council for Business Education (IACBE). Also available are a new Master of Education in Educational Leadership, and a Master of Education in Teaching, both taught exclusively online.

Movement of all instruction online in March 2020 in response to the COVID-19 pandemic required rapid adjustment for the institution, including implementation of sufficient technological infrastructure to support large amounts of online instruction, as well as training of faculty and staff in distance-learning pedagogy and <u>use of this technology</u>. This has served the University well going forward to <u>support the growth</u> of online programs and courses.

Development and External Funding

Shepherd, as a public institution, depends on state appropriations for support. These were in decline for many years; between 2012 and 2017, for example, state appropriations declined by nearly two million dollars, only beginning to recover in FY 2019. Thus, the institution has continued to seek external funding in multiple venues.

In December 2016, the Shepherd Entrepreneurship and Research Corporation (SERC) was established as a non-profit corporation supporting the development of projects, partnerships, and initiatives that will advance research and economic development initiatives for the University and the region it serves. Since 2016, SERC has established and supported <u>new initiatives</u> including the Center for Regional Innovation, the FASTEnER Lab, the Agricultural Innovation Center, and the Bill and Bonnie Stubblefield Institute for Civil Political Communications.

Shepherd's <u>Office of Sponsored Programs</u> (OSP) provides faculty and staff with guidance and assistance through every stage of the grants lifecycle, including prospecting, proposal

development, submission, negotiation, implementation, and closure. OSP monitors all campus activities related to seeking or spending external funding to ensure fiscal responsibility and compliance with all federal, state and institutional policies, and offers semesterly skills training, collaboration-building, and publicity opportunities to nurture and sustain a culture of successful, varied and well supported grantsmanship. The OSP manages an active award portfolio valued at over $37 million, with an FY 2026 projected revenue from active and closed grants of approximately $12 million. Resources for grant development are available on the OSP website, by request from the OSP, and in semesterly trainings. The Board is provided regular updates on the active and pending grant portfolio.

In 2020, the Office of Alumni Affairs and the Alumni Association appointed a new Director of Alumni Affairs and a new Alumni and Annual Giving Coordinator. Under their leadership, Alumni Affairs built stronger connections to alumni via alumni surveys, multimedia communications and updates, regular events such as Homecoming, enhanced Alumni Association membership benefits, alumni recognition programs, volunteer and engagement programs, and working with other University departments to connect alumni to current students and integrate alumni into campus life. However, due to budget constraints, since 2022 the Office of Alumni Affairs (OAA) has been reduced to one full time employee, the Director of Alumni Affairs, with the responsibility of managing the day-to-day operations of all Alumni Affairs and Shepherd University Alumni Association (SUAA) related activities. Despite the challenges, the OAA/SUAA and the VP of Development and Annual Giving have made significant progress in alumni engagement.

Student Processes

In past years, students often had to obtain multiple signatures to complete simple processes such as withdrawing from a class or having classes added back to their schedules, a process known as the "Shepherd Shuffle." Simplification of the payment process, reduction of the number of drop dates for nonpayment, and allowing staff in the Advising Assistance Center to sign off on certain forms have eased these processes, augmented by conversion of many forms to electronic formats. Work continues on simplification of necessary processes and reduction of paperwork, to enable students to conduct their business with the University as efficiently and effectively as possible.

The National Survey of Student Engagement (in 2019) indicated that there was still work to be done in this area; while freshmen were happier with their interactions with administrative staff and offices outside of the classroom and student services than those at other public and COPLAC institutions, seniors were less content with their interactions with student services staff. In 2025, NSSE results indicate that continued efforts toward improvement of the student experience are paying off; levels of satisfaction with student support services and other administrative staff are improved from those reported in the 2019 NSSE results. Resolution of known procedural issues impeding student processes, and continued development and implementation of student opportunities both inside and outside the classroom, have likely contributed to this improvement, and will help to reinforce this upward trend.

Student Success

Changes in staff and responsibilities, along with implementation of new retention software, have led to a closer examination of how the institution handles retention efforts for students.

The University continues to evaluate and improve its programs and efforts toward support of student enrollment and retention. Current programs are continuously assessed and improved (as discussed in Core Component 3E), remaining responsive to changes in student demographics and needs, and new initiatives are designed to allow for effective assessment of outcomes and use of assessment results for improvement.

Human Resources

The Office of Human Resources (HR) implements timely feedback to support merit pay options and improve accountability. Supervisors are trained in coaching and feedback to promote employee success.

The COVID-19 pandemic necessitated new policies and safety protocols. HR developed rules for face coverings, social distancing, safety standards, work shifts, building signage, personal hygiene, travel, testing, and health monitoring, and implemented remote completion of new hire paperwork, virtual orientation, and practices to limit face-to-face meetings. In June 2020 HR created protocols for resumption of on-site work, including expectations, guidelines, and educational content; these protocols continue to govern and inform the work experience, providing additional flexibility and guidance for remote work and online education. The ability of faculty and staff to serve and support students remains a priority.

Facilities

Facilities works closely with Campus Services, Student Affairs, and Academic Affairs to best understand opportunities for and roadblocks to optimal student outcomes and experiences. This input is used to find ways to best utilize current institutional resources. For example, Facilities evaluates the extent to which upgraded building mechanical equipment can improve internal environments and reduce energy costs. Assessment of the potential cost of boiler and HVAC updates to Snyder Hall drove the decision to seek a WV-HEPC energy loan to update outdated equipment, once projections indicated that annual savings would be greater than debt service on the loan. Internal trades personnel were tasked with repairs and maintenance within their areas of expertise, and duplicative services were terminated.

Shepherd's physical plant is maintained and improved with environmental sustainability in mind. Notable projects in the last several years include:

- LEED Certification: The Center for Contemporary Arts Phase II was the first building on campus to become LEED certified. CCA II has been designated LEED Silver by the U.S. Green Building Council, and is one of the few college campus buildings in WV to achieve certification.
- REAP Water stations: grant funding from the WV Department of Environmental Protection supported the installation of 30 filtrated water bottle refilling stations across campus. This work was completed in 2023. These stations have offset the need for single use water bottles and much of the water delivery service previously contracted, reducing costs and the environmental footprint of campus.
- WV HEPC Deferred Maintenance Control System Integration: State grant funding has supported the optimization of Shepherd's control systems for locations including (but not limited to) the Byrd Science Center, the Student Center, and the Wellness Center. This project will improve efficiency of the affected buildings and reduce operational

costs to the University.

Auxiliaries

Auxiliary units, including the Student Center, Wellness Center, dining facilities, and residence halls, generate net revenue and are an area of potential revenue growth for the institution. Management of the University Bookstore was outsourced to Follett in 2017. This partnership resulted in a renovated space as well as a more robust rental program and digital offerings. The relationship with Follett is heavily grounded in leveraging buying and negotiating power with publishers to deliver a variety of course materials delivery models to successfully manage costs for students. The University Dining Services currently partners with Aramark. Surveys are requested, compiled, and evaluated to gauge satisfaction and effectiveness This partnership also facilitates the ability of the University to leverage Aramark national corporate resources to implement new operational design and layout, including the new residential dining facility slated to open in fall 2026. Student feedback provided to Dining Services from 2021 - 2023 led to a reimagining of the Student Center Rams Den seating area, with some station remodels in the service areas.

Continual assessment of course materials cost by section has led to successful cost containment that has kept costs close WV-HEPC low-cost materials objectives. The inclusive access program identifies high enrollment classes for which the Bookstore can negotiate substantially reduced prices, typically below those available through online markets. This program was launched with a messaging campaign by both the Bookstore and the University, and has resulted in significant savings for students. To date, this program has delivered substantial savings to students and helped ensure students have course materials on the first day of classes to support student academic readiness. Additionally, thanks to WV HEPC funding through the Open Education Resources (OER) grant program, Shepherd is engaged in the eighth consecutive round of OER, which engages faculty to develop curriculum that reside in the public domain or are available through no cost of low cost access with no or limited restriction.

Classroom and Educational Technology

Shepherd continues to upgrade and enhance classroom technology and infrastructure. Through a close partnership with academics and facilities, each year classrooms are identified for upgrades. In addition, the institution has put in place standards for room updates to ensure technology is familiar to faculty across campus. Twenty-three classrooms were completed in 2023, seventeen in 2024, and eleven in 2025, with more scheduled before the end of the academic year.

In 2024, Shepherd was awarded a USDE grant of over $2.2 million to support classroom and computer upgrades, and Shepherd IT Services is leading the effort to complete these activities over the life of the grant. In addition to the classrooms mentioned above, three auditoriums are scheduled for technology upgrades by early 2026. These spaces are used for instruction and events, so updates to audio-visual systems and computers will provide much-needed improvement to the user experience.

Three HyFlex classrooms are also expected to be completed by end of 2025. The HyFlex classrooms will be designed to provide an exceptional learning experience for faculty and students participating in hybrid learning. Face-to-face and remote students will be able to

participate fully in the classroom discussions and activities through the use of this technology. This work will contribute to our existing distance education partnership with local high schools and is supported by a USDA grant of over $100,000.

In 2025, Shepherd updated the Edutech lab (a hands-on lab for faculty instruction and professional development.) in the Scarborough Library. An instructional designer and instructional technologist provide hands-on training in software, Brightspace, and use of classroom technology in this space. It was recently updated with improved audio-visual technology and a new computer. Techshop trainings are offered throughout the academic year, covering topics such as using features of Brightspace, Office, and other available tech to enhance teaching and learning.

Virtually all classrooms are equipped with a computer and projector or TV. Many have more advanced audio-visual including multiple projection capability, PTZ cameras, and room microphones. IT works closely with academics and facilities to identify and prioritize classrooms for upgrades to ensure the best experience possible for faculty and students.

These projects are managed through a collaborative effort of IT Services, Office of Sponsored Programs, Procurement, Facilities, and Academic Affairs.

Technology

Shepherd participates in partnerships and programs that allow for efficiency in cost and resources for technology equipment and services. These partners include:

- Dell: direct purchases of computers and related technology (desktop computers, laptops, monitors, docking stations, servers, etc.).
- Apple: direct purchases of computers and affiliated products (MacBooks, iMacs, iPads, etc.).
- CDW: network infrastructure, software, and affiliated technological products.
- NRI: network infrastructure, resource support, audio-visual equipment and installation, servers.
- IntegraOne: network infrastructure, Internet2 infrastructure, consulting services, servers.
- Daly Computers: security network infrastructure and wireless access point products.
- TelePlus: Audio-visual equipment and installation, door locks, and security cameras.

Development of New Programs

Shepherd is determined to avoid expansion of undergraduate and graduate programs beyond its current capacity to deliver such offerings. Proposals for new programs and intent-to-plan documentation require analysis of impact on current students, programs, and resources, which is considered in the approval process. While WV-HEPC oversight of program creation is no longer required, the University continues use of the previously established intent-to-plan model to ensure thorough review of new proposals. Shepherd is conscious of its impact on community resources as well; for example, the Nursing program admits a limited number of students (currently 60) at a time, to avoid overloading its community partners with clinical placements.

The institutional planning process described throughout this Assurance Argument documents Shepherd's work to anticipate emerging issues and trends both institutionally

and on a broader regional and national level. Current and emerging phenomena are closely monitored and considered in all aspects of planning.

The addition of discipline-specific professional advisors is an example of planned improvements implemented in response to demonstrated need based upon evaluation of operations. Initially, a single position in the College of Business (CoB; now the College of Business and Recreation) was piloted to improve the quality of advising while reducing faculty advising workloads. This was sufficiently successful to merit creation of a full-time advisor position in the CoB, and extension of the initiative to include advisors for the College of Science, Technology, Engineering, Mathematics, and Nursing. Initial responses from faculty in these areas indicate positive results for both faculty and students.

Curricular planning necessarily takes into account both current programs and programs created in response to demonstrated need; curricular proposals must account for both demonstrated need and current and projected changes in the educational environment. Priorities for planning of new programs and curricula include:

- Developing new areas of study that will attract new student populations, particularly adult learners and/or transfer students.
- Fostering development of continued partnerships between Shepherd and two-year institutions within the state and region.
- Finding ways to re-package current courses and curricula to meet interdisciplinary demands in new employment areas, while focusing on stewardship of resources.
- Providing opportunities for flexible paths of study, offering a more individualized approach to undergraduate education.

The last point is particularly vital, as many employment opportunities require students to have a variety of skills for the evolving job market and the changing nature of work in a post-pandemic world.

Academic Inventory

The academic program review process evaluates program viability; occasionally, the decision is made to close a program. For example, the Early Education baccalaureate was discontinued in recognition of student preference for an Elementary Education degree with an Early Education teaching endorsement. In such cases, the decision to close is made only after appropriate deliberation and analysis, and program closure is effected with as little impact on students in the program as possible.

Recognizing the need to expand academic inventory for all of its institutions, the state's Higher Education Policy Commission has heavily invested in a statewide push to increase the development of microcredentials in a systematic manner. Shepherd has taken an active leadership role at the state level in helping to develop the necessary policy infrastructure to make this a reality.

Academic Restructuring and Transformation

In summer 2017, the Academic Restructuring Committee was formed to review and recommend improvements to the current academic administrative model. Over the next year, draft models were created and presented to the campus, and the final proposed model was approved by the BoG in February 2019 and implemented in Fall 2019. The new

structure was designed to provide significant savings over the previous structure, better allocation of resources, and new organizational, curricular, and philanthropic opportunities.

In response to both the 2023 Board-mandated Academic Prioritization, as well as new academic leadership joining the institution, a "transformation" of the Division of Academic Affairs is now underway. Originally scheduled to commence in Spring 2026, additional time for analysis of input has recently been provided by the Board of Governors.

Development of New Facilities

Campus capital planning and projects are governed by the 2014 Campus Master Plan and the 2020 Campus Master Plan Update. Shepherd began the process of updating the campus master plan in November of 2025 when the President established the committee membership for the Campus Master Plan Development Committee and <u>charged the Committee</u> to action.

Annual capital plans are <u>presented</u> to the Board of Governors once their financial feasibility and benefit to the University have been established. Prior to presentation, such plans are vetted by stakeholder groups such as the Faculty Senate, the Budget Advisory Committee, the Executive Leadership Team, and the Student Government Association. Often, advisory committees are formed to research, assess, and make recommendations for specific projects.

Potomac Place

In response to a need for additional, updated on-campus housing attractive to more mature students, Shepherd's newest residence hall, <u>Potomac Place</u>, was built on West Campus in 2016-2017. It provides modern, apartment-style living with on-site food service, laundry, and lounge facilities for 298 residents. Student surveys indicated that the East Campus residence halls built in the late 1950s and early 1960s no longer attracted students, and actively hampered recruitment. The University partnered with the Shepherd University Foundation for the project. The construction budget was largely driven by anticipated rental rates based on market projections; the current budget is driven by the established Pro Forma for the project. Once 40-year financing from the U.S. Department of Agriculture Rural Development Office is paid off, the University will own the building fully. Potomac Place opened to students for Fall 2018.

East Campus Loop

The <u>East Campus Loop</u> project is designed to repurpose property on East Campus currently containing the Dining Hall and older residence halls left unused / underused due to age and declines in enrollment. Two existing buildings have been demolished, making way for future potential public/private partnerships and other growth opportunities.

King Street has been repaved, and the sidewalks have been replaced. Additional alterations have been made to the C and K parking lots making for a more attractive look with additional parking.

West Campus Dining Hall and Multipurpose Building

The <u>West Campus Dining Hall and Multipurpose Building</u> represents a transformational

design-build project on Shepherd's West Campus. This project will enhance our campus infrastructure and provide top-notch facilities for both dining and multipurpose activities for our students and our entire campus community. This building project includes a new 300+ person, 13,000 sq. ft dining hall that includes a new kitchen and servery, complemented by an adjoining 37,000 sq. ft multipurpose complex. This multipurpose building will house new offices, conference rooms, a weight room, hydrotherapy room, training room, and locker rooms. It will offer a range of amenities to serve the various needs of our students, faculty, staff, and community.

On October 31, 2024, Shepherd University issued a request for proposals for the Dining Hall/Multipurpose Building Project. A mandatory pre-proposal meeting for the Design/Build teams took place on November 12, 2024, to discuss the requirements, the deadlines, and the location of the project. Seven proposals were received. The committee met on December 12, 2024, to discuss the process of selection and the various requirements of the committee. On January 2, 2025, the committee selected the design build team of Waynesboro Construction/BFM, and groundbreaking took place on May 4, 2025. This project has been progressing quickly, with a project completion date of September 2026.

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Criterion 4 - Summary

The institution's resources, structures, policies, procedures and planning enable it to fulfill its mission, improve the quality of its educational programs, and respond to future challenges and opportunities.

Argument

Shepherd effectively and efficiently uses its resources to fulfill the institutional mission, and to improve the quality of the education it provides. Shepherd places particular attention on implementation of plans resulting from careful deliberation and consideration, in order to achieve its goals.

Financial information is shared regularly with University administration and the Board of Governors (BoG). Financial documents are transparent and made public on the web pages of the BoG and the Office of Finance. Budgeting is handled via an inclusive and data-driven process, using projections of enrollment and revenues as well as anticipated expenses, with the student educational experience as the top priority.

While resources continue to be limited, careful attention to potential cost savings, combined with an increase in Shepherd's state appropriation, thoughtful analysis of data, and resourceful pursuit of additional revenues, have resulted in improvements to the University's financial position in recent years. As a result, Shepherd continues to be well positioned to address current and future challenges and opportunities, and to make effective decisions on investment of resources to support the institutional mission.

Planning, budgeting, assessment of learning, and evaluation of operations are linked via University planning processes and documents, and include wide-ranging participation from internal and external constituent groups. Planning processes strive to manage existing financial resources effectively, while working to develop new campus-based and external revenues. Goals remain realistic in the face of resource limitations, while still allowing for innovation and growth. Planning documents and processes are transparent and inclusive, and aid in supporting and sustaining educational programs, while at the same time monitoring quality and effectiveness; planned improvements are implemented and adjusted as needed. This will ensure that the institution can continue fulfilling its mission as a premier public university (grounded in the liberal arts and sciences) that prepares students for lifelong learning and success in their chosen pursuits and serves as a hub for academic, cultural, and economic opportunity.

Sources

There are no sources.