

Take the Pain out of Strategic Planning

Finding the Promise, Avoiding the Pitfalls of Institutional Strategic Planning

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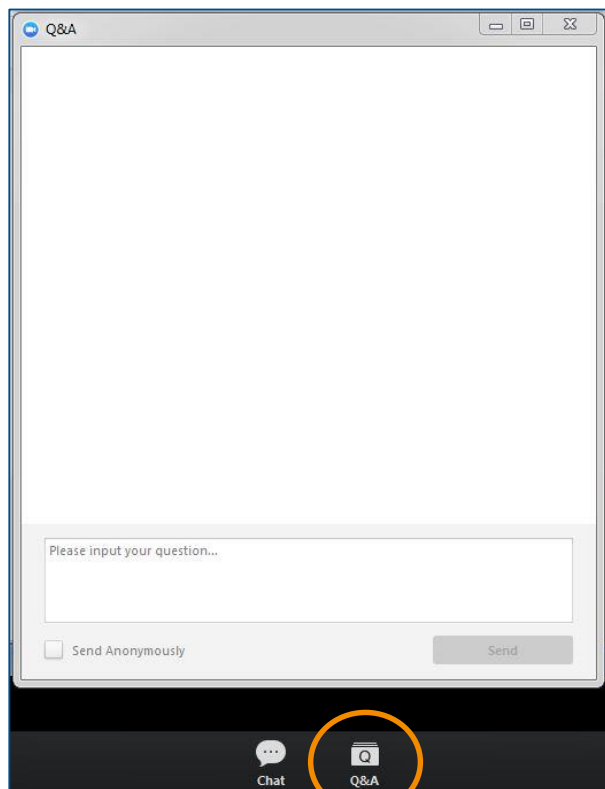


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After the webinar, a member of our team will be in touch to follow-up on your questions individually.

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1 The Strategic Planning Challenge

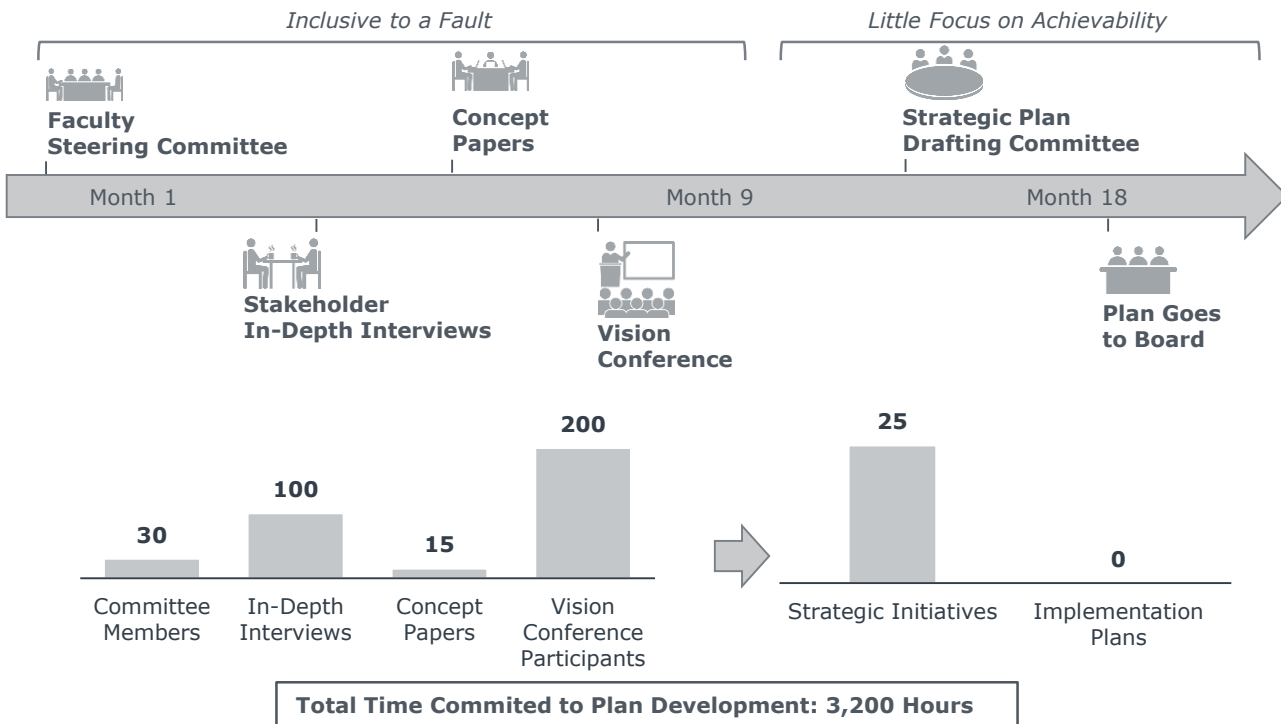
2 Three Pitfalls to Avoid

3 Strategic Planning Resource Center

Strategic Plans Focus on Planning, Not Execution

Consensus-Based Strategic Planning Under-Resources Implementation

Strategic Planning Process at a Midsize College



100 Years of Management Literature in 1 Minute



“Strategic planning is the continuous process of making present entrepreneurial (risk-taking) decisions systematically and with the greatest knowledge of their futurity; organizing systematically the efforts needed to carry out these decisions; and measuring the results of these decisions against the expectations through organized, systematic feedback.”

Peter Drucker, "Management Tasks and Responsibilities", 1973

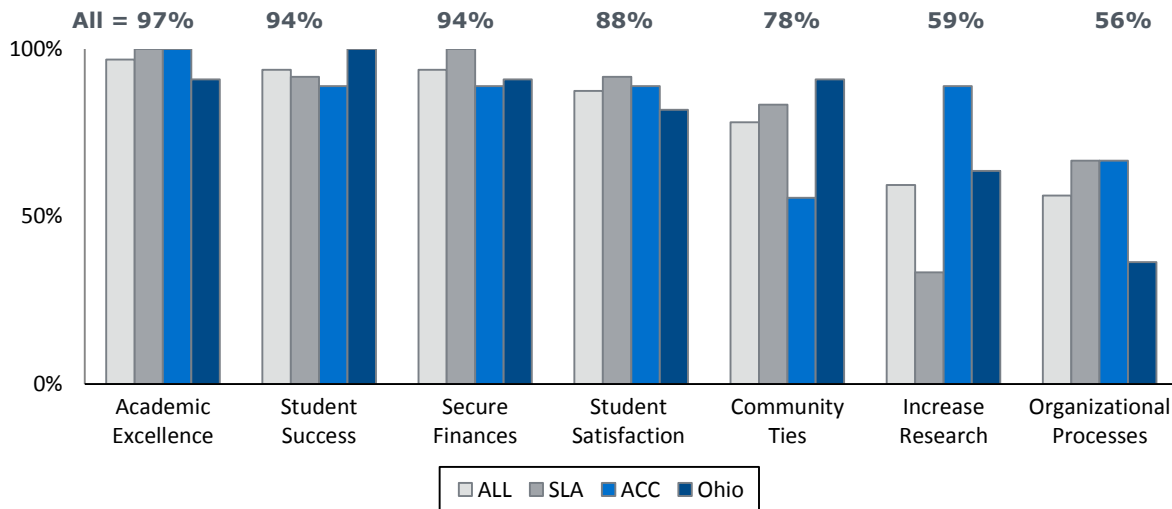
“There's a fundamental distinction between strategy and operational effectiveness...Strategy is about making choices, trade-offs; it's about deliberately choosing to be different...The essence of strategy is choosing what not to do.”

Michael Porter, "Competitive Strategy", 1980

Goals Too Distributed for Strategic Change

Unfocused Plans Reflect Institutional Values Rather Than Opportunities

Percentage of Strategic Plans That Include Indicated Strategic Goal



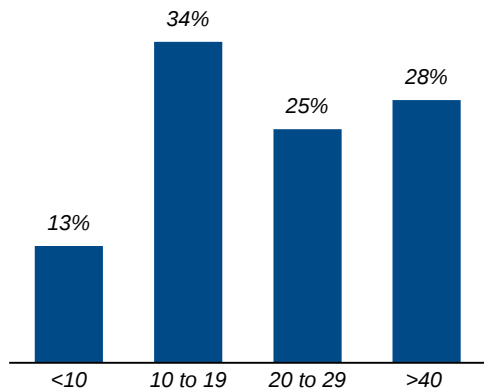
(n=32 strategic plans; ACC=9; Ohio=11; SLA=12)*

1) *Audit participants include a selection of schools from the Atlantic Coast Conference, the University System of Ohio, and several small liberal arts conferences.

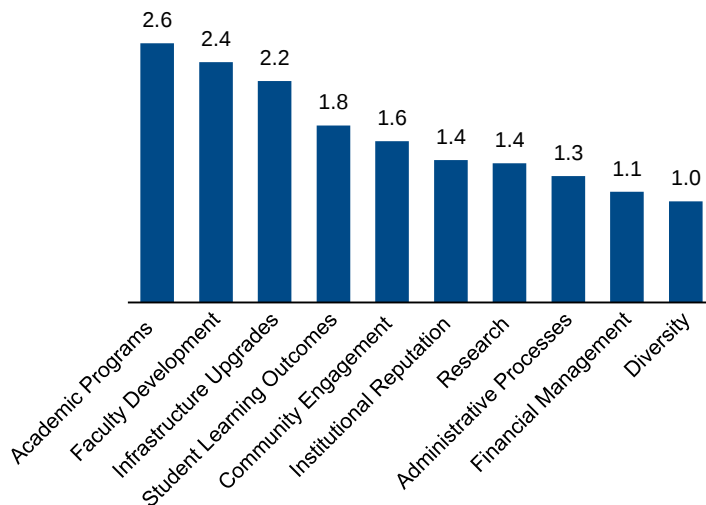
Cross-Campus Inclusion Dilutes Implementation

Abundant Goals Leads to Unwieldy Number of Initiatives

Number of Total Initiatives (Per Plan)



Number of Individual Initiatives (Per Plan by Category)



Experts recommend that plans identify no more than seven strategic initiatives per planning cycle.



Strategic Planning Pitfalls

SECTION

1

1

Distributed Input Leaves Plan Too Broad to Implement

2

Plans Target the “Aspirational” over the “Actionable”

3

Implementation a Secondary Priority for Stakeholders

Market Demands Set Landscape of Opportunity



Target Sweet Spot Between Open and Prescriptive

Open-Ended Strategic Planning

- ✗ “Blue ocean, blank canvass brainstorming” sounds desirable but is rarely what campus needs
- ✗ “Leadership by buzzword” fails to direct energy towards actual needs

Growth Within Guardrails



Initial guidelines provided based on challenges, opportunities, and resource constraints, especially where stakeholders lack visibility



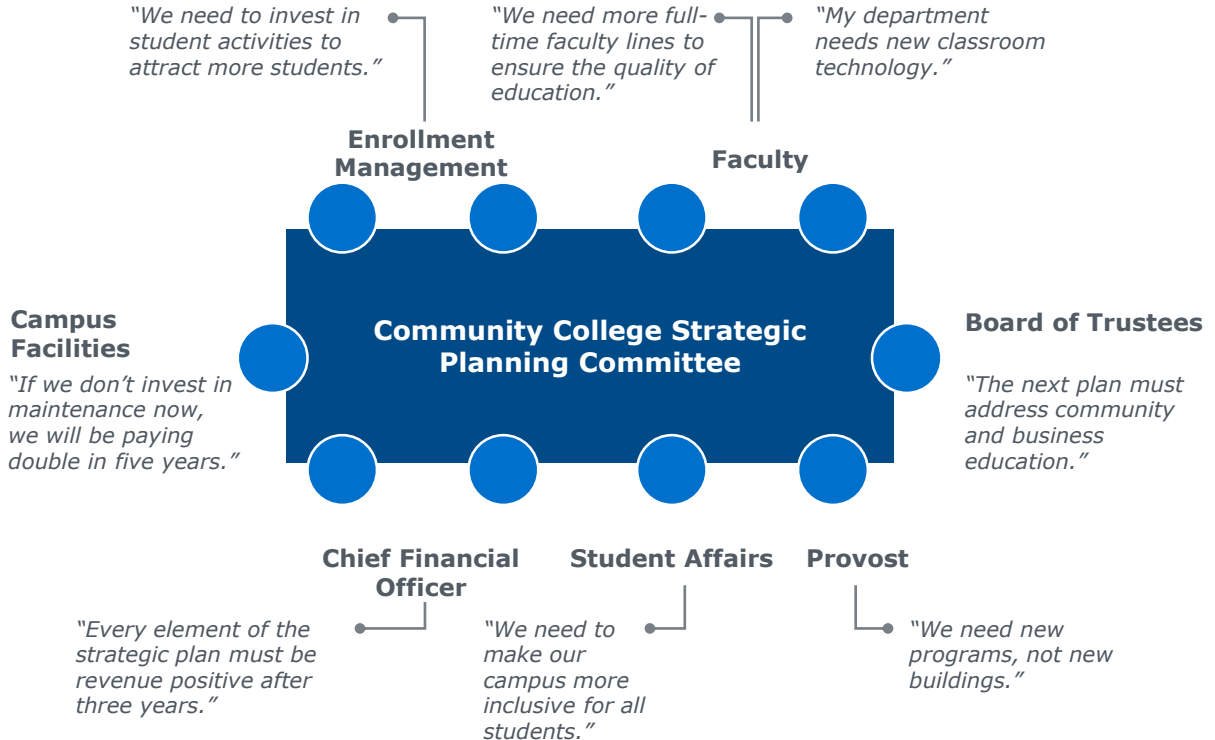
A small cohort identifies initial direction before initiating campus-wide process

Predetermined Strategic Planning

- ✗ Overly defined needs stifles creativity and limits potential of process to socialize ideas and gain buy-in
- ✗ Campus entities who don't see themselves reflected in plan disengage

Team Brainstorming Yields Little Direction

Without Guidance, Goal-Setting Exercise Becomes Stakeholder Wishlist



Inclusive Strategic Planning Leads to Broad Goals



70-Person Committee¹ Creates Impossible Plan



Strategic Planning by Committee...

Committee of more than 70 faculty, staff, students, alumni, and community members develops strategic plan over the course of a year



...Leads to Goals That Lack Specificity

Sample goals from college's strategic plan:

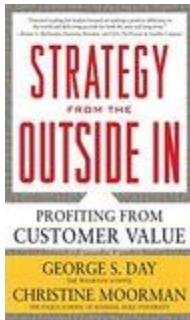
1. Make the college the first choice of more students
2. Improve health, wellness, and quality of life for children, adults, families, and communities
3. Offer transformational education
4. Support faculty as they work collaboratively with diverse communities
5. Integrate international and intercultural experiences

1) Anonymous member college

Outside-In Approach Key to Effective Planning

Lessons from Other Industries

Outside-In Strategy the Key to Success in an Unpredictable Market



Inside-Out Strategy Begins with Capabilities

An Inside-Out strategy begins with a focus on the institution's previous behavior and current capabilities

- What are we good at? What are our capabilities and offerings?
- How can we sell more? Gain more share? Improve productivity?
- Where can we apply our new productivity?

Outside-In Strategy Begins with Customer Needs

An Outside-In strategy focuses first on the customer and the greatest opportunity for providing value

- What customer value do we provide with what capabilities?
- Is our value proposition perceived as superior?
- How are the needs of our customers changing?
- What new competitors are anticipating and meeting these needs?

"Companies that continued to profit and grow throughout the boom-and-bust cycles of the last 20 years pursued an **Outside-In Strategy**, vs. Inside-Out."

Putting Market Needs at the Center



Getting to “Outside In” Strategic Planning

BEFORE ►



Product-First Strategy

Key Inputs:

- Success stories at other institutions
- Programs already in the portfolio
- Credential macro-trends

Representative Questions:

- *Do we have faculty to launch new programs?*
- *What short-format, non-traditional credentials do our peers offer?*
- *How can I find students for our programs?*

1 
**Understand Student Segments
and Motivations**

2 
**Assess Regional Labor
Market Demand**

3 
**Align Opportunities with
Internal Capabilities**

AFTER ►



Audience-First Strategy

Key Inputs:

- Student motivations, career pathways, and market sizing
- Regional labor market data
- Program portfolio performance

Representative Questions:

- *What will convince local students to enroll?*
- *What environmental barriers to students face?*
- *What is more important to students and employers: credentials or skills?*

1

Distributed Input Leaves Plan Too Broad to Implement

2

Plans Target the “Aspirational” over the “Actionable”

3

Implementation a Secondary Priority for Stakeholders

Be Ambitious, but Please Be Specific

Broad Visions Fail to Anchor Goals in Achievable Actions

Common Challenges with Strategic Plan Objectives

Challenge with Aspirational Vision



Unclear what falls into or out of scope

Sample Goal

"Realign all procedures and practices to provide better service to our mission without adding costs"



Defers bulk of action and impact too far into future

"Create a taskforce to design and implement a sustainable plan to invest in high-quality academic programs"



Offers no substantive recommendation

"Identify and combat every systemic barrier to gender and ethnic inequality"



Distributes accountability beyond any team's or employee's purview

"Ensure that the university employs best practices to promote health, wellness, and work-life balance for faculty, staff, and graduate assistants"



Proposes "fool's errand" research task instead of plausible pilot program

"Undertake thorough study of the learning environments that enable intellectual risk-taking"

What Kind of ROI Should You Expect?

Impossible to Evaluate Every Initiative on Cost and Revenue

Clarity of Revenue Impact from Strategic Initiatives



Potential Evaluation Procedures



Non-Financial KPIs



Formalized Evaluation and Sunsetting Procedure



Cost and Revenue Targets



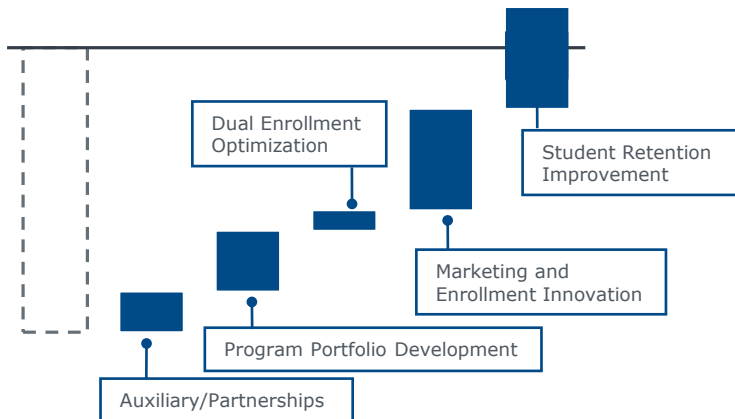
Requirement to Eventually Self-Fund

Prioritize Financial Goals by Potential



Charting the Course Towards 4% Growth

Sources of Community College Growth Opportunities



EAB Supports Each Step of the Way

Industry Partnerships

Becoming an Employer Responsive Institution

Portfolio Development

New Program Launch Guidebook

Dual Enrollment

Turning High School Partnerships into College Enrollments

Marketing and Enrollment

The Shifting Enrollment Landscape

Student Retention

Achieving Pathways Goals with Student-Centric Design

Six Characteristics of Effective Goal-Setting

Advice for Crafting Multi-Level Goals



Characteristics of Best-in-Class Goals

Specific

- Goals throughout the college must identify discrete changes or accomplishments an individual could achieve

Measurable

- For individual or high-level goals, the institution should be able to determine a benchmark and agree on how to define progress

Achievable

- Goals at all levels of the organization should be realistically achievable in a given timeframe considering past performance

Relevant

- Stakeholders should feel that the goal applies to their role and matches with their own values

Time-Bound

- Individuals and institutions need to feel urgency to reach goals in a specific timeframe

Public

- Opaque indicators of success fail to remind faculty and staff that individual effort contributes to institutional success

Tie all goals back to the institution's strategic priorities

1

Distributed Input Leaves Plan Too Broad to Implement

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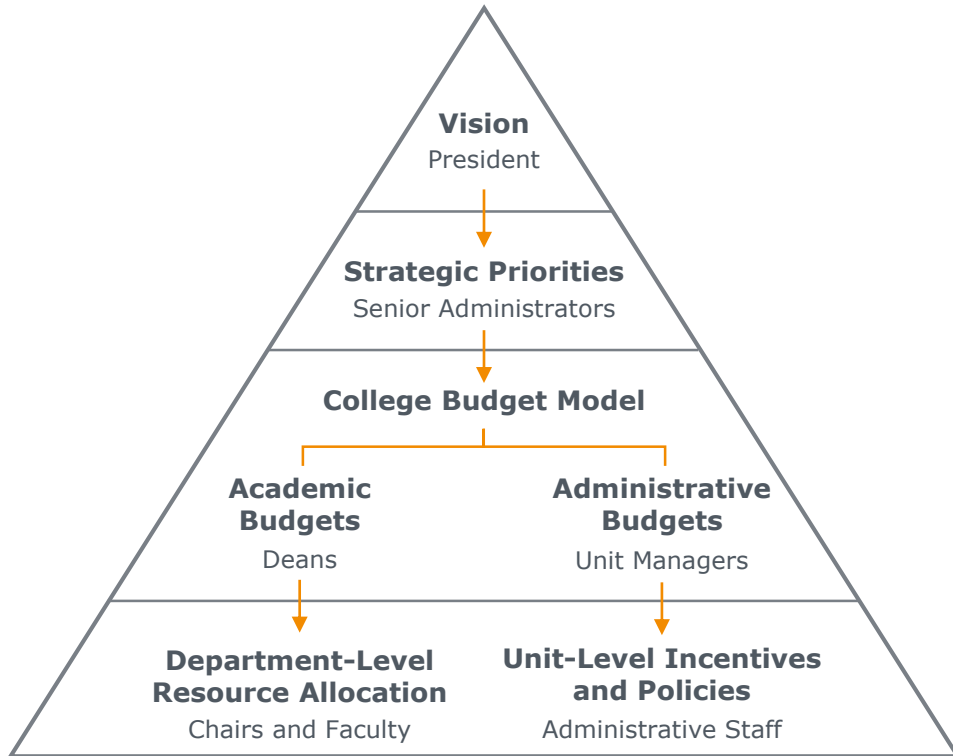
Plans Target the “Aspirational” over the “Actionable”

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**Implementation a Secondary Priority
for Stakeholders**

Implementation is Everyone's Responsibility

Presidential Vision Cascades into Front-Line Activities



One Size Doesn't Fit All

Overly Top-Down, Uniform Approach to Metrics Alienates Departments

The Traditional Unit "Accountability" Narrative



"These are our strategic goals – figure out how to get there."

Administration



Dean

"I'm evaluating our progress using these metrics."



Department

"Huh? These don't describe what we do at all!"

The Predictable Consequences

- 1 Unit Culture Poisoned Against Future "Efficiency" Initiatives
- 2 Deans and Administration Miss Genuinely Valuable Faculty Input
- 3 Missed Opportunity to Segment Departmental Missions

Two Common Deficiencies in Goal Setting

Sustained Staff Contributions Needed for Successful Implementation

Strategic Plan Goals



- Improve completion
- Increase retention
- Facilitate transfer

Progress Metrics



- Fall-to-spring retention
- Time to degree
- Developmental education pass rate



Disconnected from Individual Goals



- “What behaviors should I change?”
- “Is graduation now my job?”
- “Shouldn’t I just inflate grades?”

New Initiatives Launched



- Excitement on campus
- Innovators and early adopters come forward
- Roles and structures may shift quickly

Initial Gains



- Small pilots hit their desired goals
- Leaders rightly celebrate success
- Scaling up discussions begin



Progress Stalls Beyond Innovators



- Lack of broad buy-in slows adoption
- Cost of expansion higher than anticipated
- Resistors emerge from campus community

Cascade Goals to Create Multi-Level Urgency

Wallace Community College Builds Top-to-Bottom Accountability



Strategic Plan

Goal 1: Achieve increased excellence in student success in educational programs



Dean, Instruction

- Create initiative to improve course-level success rates, classroom experiences, and learning outcomes (I-CAN Initiative)



Associate Deans

- Ensure division director compliance with I-CAN and action plans
- Report to Dean on division performance



Division Directors

- Create annual division action plans and monitor faculty improvement on benchmarks



Faculty

- Create and maintain annual action plans
- Implement 12 high impact practices

Level-appropriate goal for each individual

Multiple levels of accountability

Explicit targets for subordinates

Personalized adoption of best practices

67%

Increase in AA/AS degree completion rates since 2011

25%

Increase in success rates for top enrollment courses after one year of implementation

16%

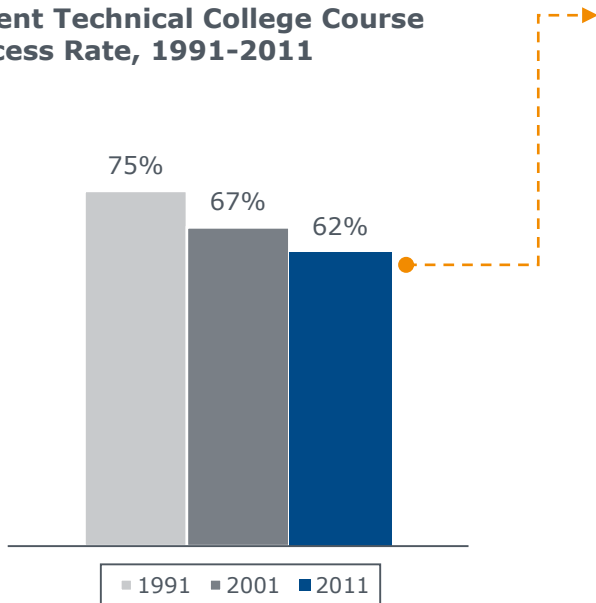
Increase in Fall-to-Fall retention rates

Filter Accountability to the Individual-Level

Student Outcomes Meaningfully Impact Faculty Evaluations



Trident Technical College Course Success Rate, 1991-2011



Trident Technical College's Outcome-Focused Performance Management System

- 1 Decline Leads to Inclusion of Outcomes in Faculty Evaluations**
Faculty must prove their commitment to improving student outcomes by reaching at least a 73% passage rate or using one of 15 other benchmarks
 - 2 Failure to Meet Expectations Leads to Improvement Plan and Inability to Teach Overloads**
Faculty who do not meet expectations must complete an Instructor Reflection Form, lose the ability to teach overloads, and may be ineligible for a raise if available
- ★ **Near-universal adoption of benchmarks leads to success rates climbing toward 75%, along with transition to compressed semesters**



Introducing EAB's Strategic Planning Resource Center

SECTION

3

Move Planning from Preparation to Results



Strategic Planning Resource Center Outcomes



Cut Planning Time

Guide stakeholders to important internal and environmental metrics

Funnel faculty and staff expertise into defined areas of strategic inquiry



Increase Transparency

Share college's current state and goals with stakeholders throughout planning process

Publish easy-to-read strategic plan with Resource Center as a guide



Hold Stakeholders Accountable

Limit goals to achievable targets

Assign responsibility to key campus leaders and teams

Track ongoing progress toward initiative and goal completion

Expert Support from EAB

Productive Planning Dialogue

Avoid hours of aimless brainstorming with templates for targeted discussion

Best Practice Research Support

Learn best practices with implementation support to achieve strategic plan goals

Strategic Plan Review

Ask EAB experts to review strategic plans and map to best practices in implementation

Upcoming Events



Webconferences



Making the Most of Your CCEF Membership

September 25, 2-3 p.m. EST



Redesigning Student Support Services for Part Time Students

October 10, 1-2 p.m. EST

National Meeting Series

Future Proofing the Community College



Washington, DC, September 17



Marina-del-Rey, CA, October 12



Nashville, October 18

Meeting Topics

- 1 Securing Future Revenue in an Era of Volatility
- 2 Strategies to Enroll the Next Generation of Students
- 3 Closing the Part-Time Student Success Gap

Contact me or your dedicated advisors to register for any event



Community College Executive Forum Team



Today's Presenter

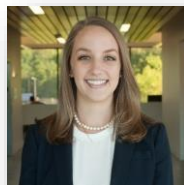


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