

Elizabethtown College

Strategic Planning Process Overview

November 2020



Strategic Planning Process Discussion

1

METHODOLOGY

Design Thinking &
The Double Diamond Approach

2

ELEMENTS OF PROCESS

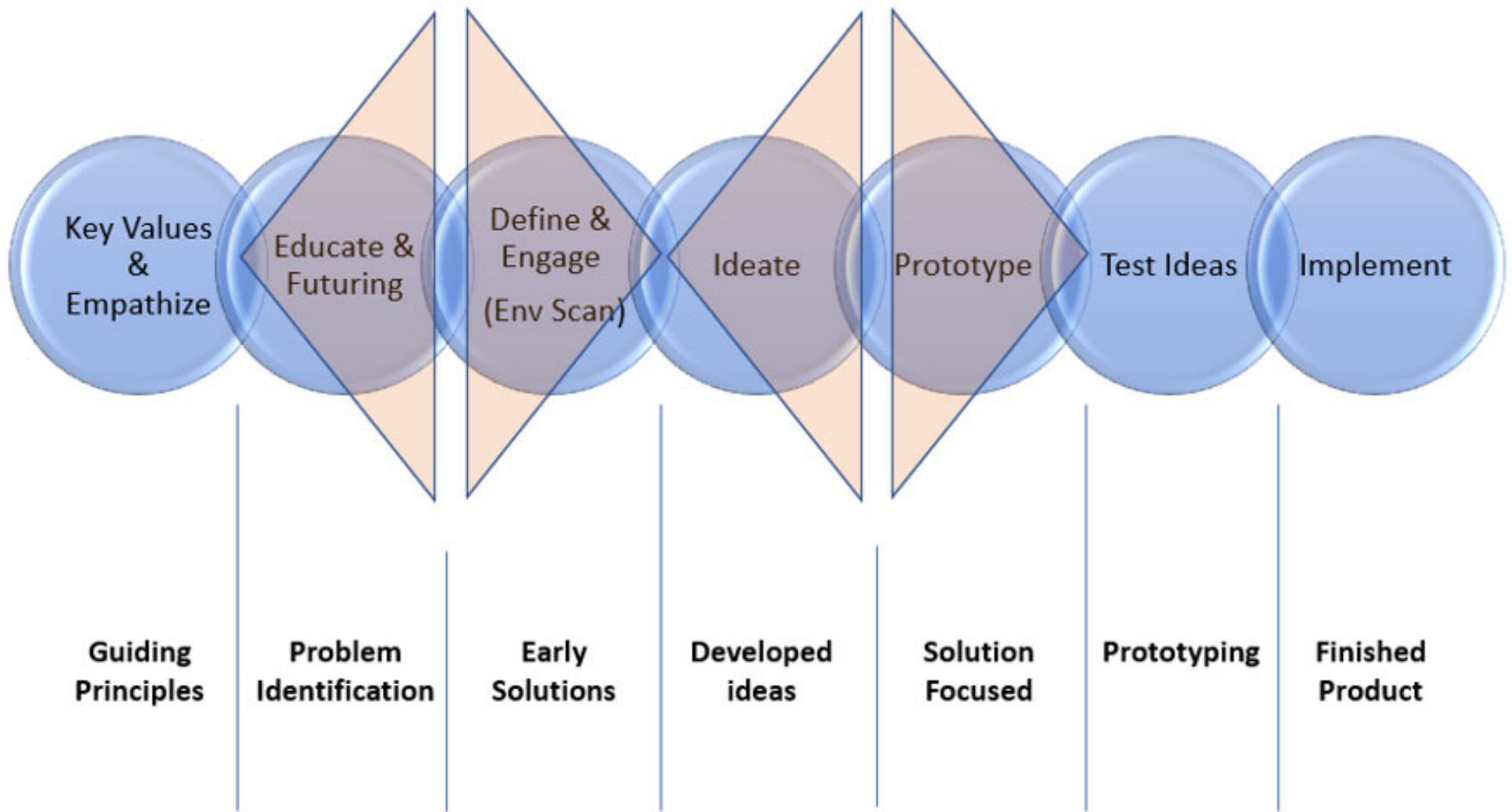
Strategy Pyramid
Asset Mapping
Key Process Stages
Strategy Opportunity Matrix
Accountability & KPIs

3

STAKEHOLDER ENGAGEMENT

Input Opportunities
Governance

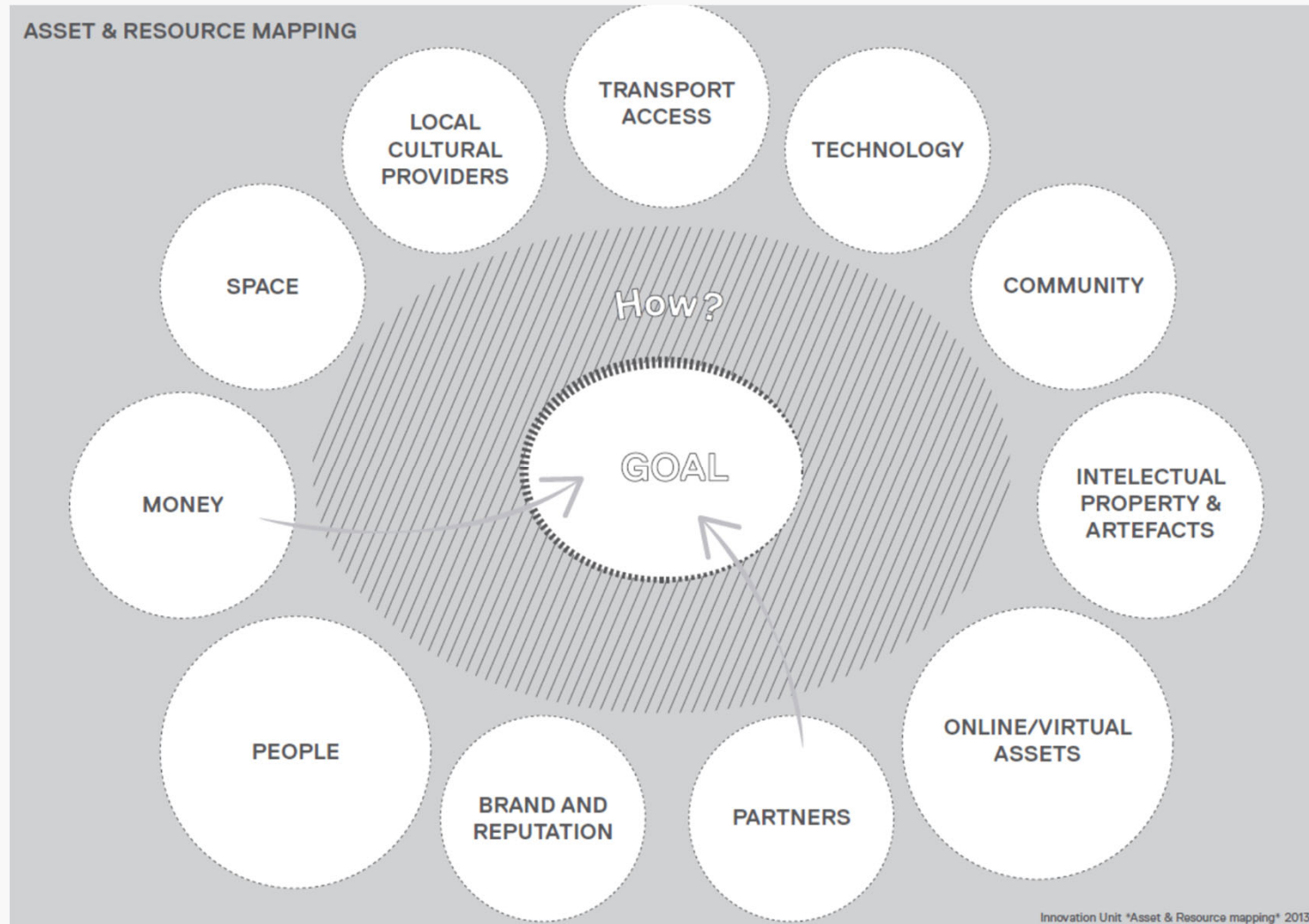
Double Diamond Design Thinking Approach



Strategy Pyramid



Stakeholder “&” Asset Mapping



Source: <http://www.innovationunit.org/> via <https://www.anewdirection.org.uk/programmes/connected-london/stakeholder-asset-mapping>

Key Input Mechanisms – Campus Stakeholders



PRESIDENT'S LEADERSHIP TEAM

Key themes input

Retreat - Environmental Scan, Strategic Themes/Roadmap

Drafts of Plan



STRATEGIC PLANNING COMMITTEE

Partner with Consultants and Leadership team in providing feedback on various deliverables (environmental scan, themes, roadmap, KPIs/metrics, etc.)



COMMITTEES

Board members will have an opportunity to provide input via small thematic interest group sessions will be held where Board members can provide input at various stages of process



THEMED SESSIONS

Community stakeholders will be able to participate in small thematic interest group sessions will be held where individuals can provide input at various stages of process

*other inputs will include campus wide **surveys (initial and in response to draft document)**, **focus groups and interviews**, direct feedback to **Strategic Planning Committee representative**, and **ad hoc through website and email**

Key Process Stages

KICK OFF PROCESS

Kick of the process with Board of Trustees October 2020.

RECEIVE PLAN FEEDBACK

Provide the Board of Trustees with a Draft of Plan

STRATEGIC PLAN CULMINATION

Provide the Board of Trustees with Final Draft of Plan in May 2021



INITIAL INPUT & IDEATION

- Landscape of Higher Education
- Environmental Scan
- Initial Stakeholder Engagement
- Refine Vision & Guiding Principles



WRITE STRATEGIC PLAN

- Initial Draft of Strategic Plan
Draft inclusive of goals,
objectives



COMMUNICATE, ITERATE & PRIORITIZE

- Finalize Plan for Presentation to Board of Trustees
- Create a Prioritize list for Resource Alignment
- Develop action plan

Planning Calendar

Plan Submitted to Board by May 2020

	ACTION ITEM	NOV.	DEC.	JAN.	FEB.	MAR.	APR.	MAY	JUNE	JULY
1	Environmental Scan – Qualitative & Quantitative (Surveys, Focus Groups, Interviews, Matrix SWOT)	●	●	●						
2	Themed Ideation Sessions with Campus Stakeholders	●	●	●						
3	Values clarification & finalization	●	●	●						
4	Identified Theme(s) Special Sessions & Strategic Roadmap Drafting			●	●	●				
5	Board of Trustee & Leadership Retreat				●					
6	Initial Plan Drafting & Iteration (includes Strategic Goals, Objectives)				●	●				
7	Campus Community/Stakeholder Input o Plan, Draft iteration(s), and Finalization					●	●	●		
8	Budget Planning & Resource Testing (“Funding the Plan”)					●	●			
9	Action Plans (Tactics) by Units and KPI Development								●	●

- Does your board include members with the skills, knowledge, and background needed to plan for the financial future of your institution? How can your board best achieve collective “financial literacy,” while recognizing that not all board members need to be financial experts?
- Do recent fiscal results and future financial and demographic trends point to a need to rethink or reform your institution’s current business model? What changes would lead to greater financial stability and long-term sustainability?
- Has your board taken a close look at your institution’s cost structure to identify the potential for reductions that would not negatively affect the mission or educational quality and student success? Are there any programs that could be consolidated, costs that could be cut, or economies that could be taken advantage of in order to increase productivity and efficiency?
- What are the key factors affecting net tuition revenue at your institution? Is financial aid being used effectively?
- Could your institution gain a competitive advantage by diversifying its educational offerings or launching new programs that attract new types of students and increase enrollments? What efforts are underway to promote student retention and completion?
- Does your board have a system for tracking key financial metrics that provides data relevant to long-term financial decision making?

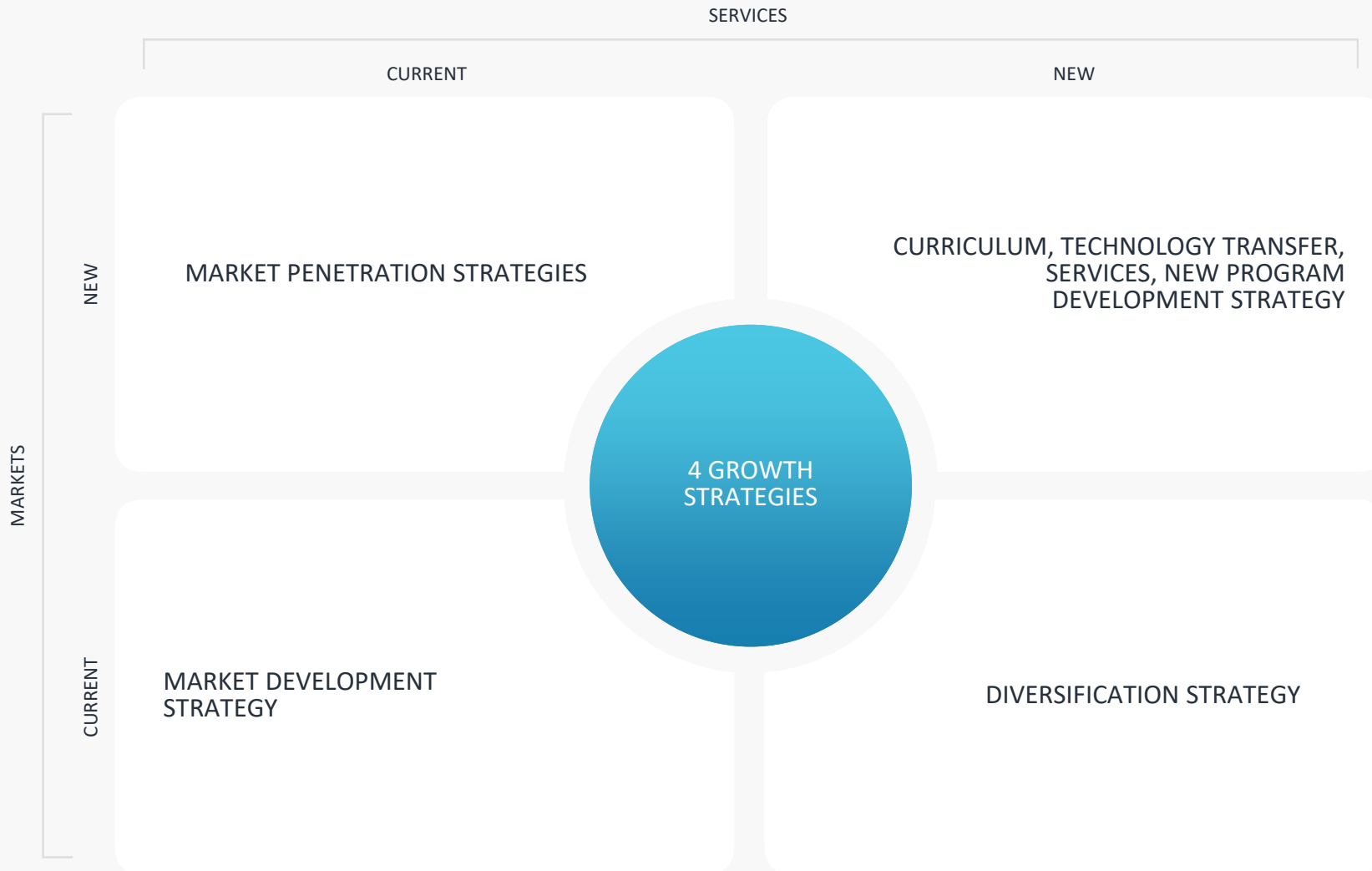
Excerpted from AGB’s *Top Strategic Issues for Boards* (2018–2019)

Key Financial Stability Questions the Board will Expect be considered as part of the Process

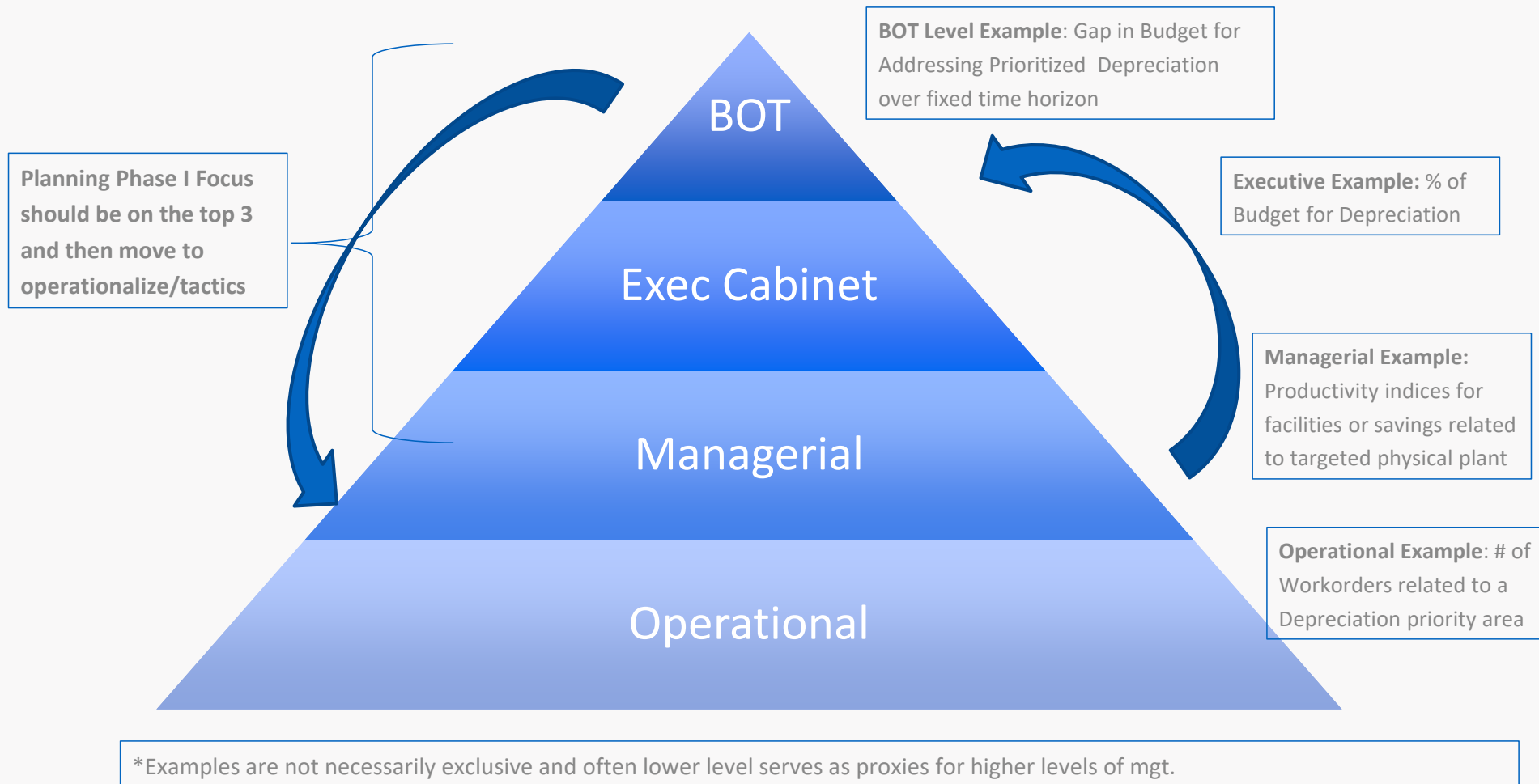
- As we move into planning phases these questions must be kept both as background and foreground.
- Your plan will have to consider these as it creates its Roadmap.

• <https://kpmg-inst.adobe.com/content/dam/institutes/en/government/pdfs/2018/board-contribution-strategy.pdf>

Strategic Opportunity Matrix



KPI Example Hierarchy



Raymond Barclay's Bio



Education

- PhD, Psychology (Measurement/Statistics and Cognition), Temple University, School of Education
- Specialization in Design Thinking – University of Virginia, Graduate School of Business
- Design Thinking & Charrettes – Harvard Univ.-Graduate School of Design
- MS , Sustainable Design – Thomas Jefferson Univ./Univ. of Philadelphia, College of Architecture and Built Design
- MDIV, Princeton Theological Seminary
- Philosophy & Religious Studies - Indiana University of Pennsylvania

Published in the following areas:

- Online learning, assessment and learning, strategic planning, resiliency, survey development, clinical psychology, statistical methods, (hierarchical linear analysis, multivariate analysis, cluster and factor analysis)

Current Role - President – Enrollment x Design, LLC (NJ) – present

Prior Roles

Associate Vice President/Associate Provost/Associate Vice Chancellor Roles

- The New School (NY)
- Stetson University (FL)
- University of North Carolina (NC)
- College of Charleston (SC)

Director Roles

- The College of New Jersey (NJ)
- Burlington County College (NJ)
- The Bonner Foundation (NJ)

Senior Analyst Roles

- Arroyo Research Services (NC) - K-16 consulting/evaluation firm)
- Burlington County College (NJ)

FOR INFORMATION ON ASSOCIATES ASSISTING THE FIRM – PLEASE VISIT

<https://www.enrollmentxdesign.com/team/>

Rob Fleming's Bio



Education

- MARCH, Virginia Tech
- BARCH, Temple University

Background

Rob Fleming is an educator, author, LEED® accredited professional and an architect.

20 years of facilitation experience in:

- Universities, non-profits, trade associations, and for-profit companies

- Founding Director and Professor at Thomas Jefferson University's MS in Sustainable Design Program
- Program augments his ability to engage a wide range of stakeholders in meaningful ways.
- Rob strives to bring a dynamic and holistic approach to his facilitation efforts with an emphasis on:
 - Social equity and justice,
 - Environmental sustainability;
 - Economic viability
 - Place-making

Heather Fomin's Bio



Education

- BA in Russian Studies from Drew University
- MA in International Education from NYU.
- Heather Fomin has 28 years of experience in higher education, university admissions, enrollment and study abroad.

Current Role

- Enrollment x Design Recruitment & Communication Associate

Prior Roles

- Assistant Vice President of Enrollment at The New School in New
- Interim roles in the Office of Financial Aid and International Students and Scholars Office.
- New School she was the Associate Dean of Admissions at Tandon School of Engineering at NYU
- Senior Associate Director of Admissions at NYU, and Acting Associate Dean of Admission at Drew University.