Strategic Planning in Today's Higher Education Environment

Prepared for Creighton University
1. Separating Fact From Fiction

2. Shifting Economic and Demographic Realities

3. Shifting Policymaker and Stakeholder Perceptions

4. Implications for Strategic Planning
Higher Ed Assailed By A Drumbeat of Critiques

Source: "Is College a Lousy Investment," Newsweek, September 2012; EAB interviews and analysis.
The Bubble Argument in a Nutshell

On the Verge of Disruption?

“For a growing number of Americans, a college degree is something obtained only through enormous sacrifice and indebtedness on their part or their parents’, or a dream that is entirely out of reach. Meanwhile, most college leaders live in a bubble in which the costs of ever more elaborate facilities, expanding administrative bureaucracies, and high-profile professors with light teaching loads can simply be passed on to customers in the form of higher tuition.

But those days are about to end. Underneath the surface, upstart institutions are perfecting radically new education technologies and business plans at the same time that young people and their parents are becoming more frustrated with the traditional higher-ed model, and more open-minded about alternatives. There is every reason to suspect that, quite soon, these new institutions will do to higher education what Sony did to radios and Apple did to computing. Afterward, our colleges and universities will never be the same. Few Americans, one suspects, will look back in regret.”

Stuart M. Butler
From The Coming Higher-Ed Revolution (2012)

College is unaffordable...

And increasingly inaccessible...

Because too much is spent on facilities, administration, and faculty who don’t teach.

However, new technologies offer cheaper alternatives...

And students are beginning to abandon traditional institutions...

Which will force universities to change radically, or disappear.
# The Other Side of the Story

## Popular Accounts Driven by Lack of Understanding

<table>
<thead>
<tr>
<th>Public Perception</th>
<th>Reality</th>
</tr>
</thead>
<tbody>
<tr>
<td>Rising tuition is driving up student debt</td>
<td>Actually, falling family income, lack of savings, non-tuition costs fueling debt growth – and the problem lies with non-completers, graduate/professional debt, and for-profits</td>
</tr>
<tr>
<td>Rising tuition reduces access for low-income students</td>
<td>Access has never been higher; net tuition for low-income students is low, greatest barriers are cost of living (room and board) and opportunity cost of lost wages</td>
</tr>
<tr>
<td>College degree is losing value</td>
<td>College premium has never been higher; baccalaureate holders earn on average 1.8 times that of high school graduates in 2013, compared to 1.4 times in 1975</td>
</tr>
<tr>
<td>Universities are losing students to low-cost providers</td>
<td>Community colleges and for-profits losing enrollment, “disruptive” innovators focused more on non-consumers</td>
</tr>
</tbody>
</table>

Source: EAB research and analysis
What Parents and Families Fail to Understand

**Published vs. Net Tuition and Fees at Four-Year Institutions, 2015 Dollars**

**Private Institutions**

<table>
<thead>
<tr>
<th>Year</th>
<th>Published</th>
<th>Net Tuition &amp; Fees</th>
</tr>
</thead>
<tbody>
<tr>
<td>2003</td>
<td>$24,590</td>
<td>$6,030</td>
</tr>
<tr>
<td>2005</td>
<td>$25,620</td>
<td>$6,710</td>
</tr>
<tr>
<td>2007</td>
<td>$26,830</td>
<td>$7,090</td>
</tr>
<tr>
<td>2009</td>
<td>$28,520</td>
<td>$7,840</td>
</tr>
<tr>
<td>2011</td>
<td>$29,450</td>
<td>$8,740</td>
</tr>
<tr>
<td>2013</td>
<td>$30,780</td>
<td>$9,080</td>
</tr>
<tr>
<td>2015</td>
<td>$32,410</td>
<td>$9,410</td>
</tr>
</tbody>
</table>

**Public Institutions**

<table>
<thead>
<tr>
<th>Year</th>
<th>Published</th>
<th>Net Tuition &amp; Fees</th>
</tr>
</thead>
<tbody>
<tr>
<td>2003</td>
<td>$14,300</td>
<td>$2,300</td>
</tr>
<tr>
<td>2005</td>
<td>$14,700</td>
<td>$2,880</td>
</tr>
<tr>
<td>2007</td>
<td>$15,100</td>
<td>$3,070</td>
</tr>
<tr>
<td>2009</td>
<td>$13,530</td>
<td>$2,570</td>
</tr>
<tr>
<td>2011</td>
<td>$12,830</td>
<td>$3,380</td>
</tr>
<tr>
<td>2013</td>
<td>$13,430</td>
<td>$3,620</td>
</tr>
<tr>
<td>2015</td>
<td>$14,890</td>
<td>$3,980</td>
</tr>
</tbody>
</table>

**Leaving Families to Make Choices Based on Misperceived Costs**

- 87% of low-income parents inaccurately estimate first-year tuition costs
- 175% average parent overestimation of four-year tuition and fees
- 1.7M non-FAFSA submitters in 2007 incorrectly assumed they were ineligible for aid

Not Exactly News...

Value of College Has Been Called into Question for Decades

April 1976

Guess Which Quotes Are From 1976 vs. 2012

“By all estimates, the rising costs of college have been paced by diminished economic returns on the college investment.”

“Is all this investment in college education really worth it? The answer, I fear, is that it’s not.”

“As much as 27 percent of the nation's work force may now be made up of people who are "overeducated" for the jobs they hold.”

“More than half of all recent graduates are unemployed or in jobs that do not require a degree.”

40 years before Sen. Marco Rubio’s comment:
“Welders make more money than philosophers. We need more welders and less [sic] philosophers.”

Fact Check: Twenty years after graduation, philosophy grads have a median salary of $97,000 while welding grads make $58,000

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Honey, I Shrunk the Class

Demographic Decline in High School Graduates Tightens Undergraduate Market and Contributes to Decelerating Enrollments

High School Graduate Growth Slower after Demographic Decline
Total Fall Enrollment, 1996-2021 (projected)

- Compound annual growth, 1996-2010: 2.8%
- Compound annual growth, 2011-2021: 1.2%
- Enrollment gap in 2021: 3.8M

Enrollment Growth Tied to Regional Demographics

Below the Averages, Local Demographics are What Matters

**Contributors to Enrollment Growth**

*Share of National Growth by Segment, 2015-2025*

- **43%** Traditional Freshmen
- **23%** Community College Transfers
- **24%** Adult Degree-Completers
- **10%** International Students

**But Demographics Uneven Across Regions**

*Projected Growth, 2015-2025*

**Translating Growth into Enrollment Numbers**

- **218,000** 10-year increase in new undergraduate enrollments
- **89** Students per institution
- **~9** Annual enrollment growth per institution

Source: EAB Analysis of IPEDS Data

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Concentration of Growth in Low-Income Segment Raises Concerns about Tuition Revenue and College Readiness

Growth of Lower-Income Families Outpacing Middle and Higher-Income Families

Percent Growth, 2000-2013

<table>
<thead>
<tr>
<th>Income Range 2014 (in thousands $)</th>
<th>51%</th>
<th>27%</th>
<th>11%</th>
<th>Total Growth 12.6%</th>
</tr>
</thead>
<tbody>
<tr>
<td>0-30</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>30-60</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>60-90</td>
<td>11%</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>90-120</td>
<td>5%</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>120+</td>
<td>6%</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
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2013 College-Going Rates by Income:

46% Low 64% Middle 79% High

“Student Affluence Test”

-262 pts

difference in average SAT 1600 score between students from lowest- and highest-income families, 2014

Shifting Student Mix
Demographics May Require Greater Investment in Student Success

Projected Net Growth in High School Graduates by Race, 2011-12 to 2021-22

- White: -139K
- Black: -53K
- Asian: 60K
- Hispanic: 154K

Distinct Challenges Facing Hispanic Students

- First Generation: 37%
- Median Family Income: $55K
- Complete Degree Within 6 Years: 62%

A Similar Story Nationwide

Flat Graduation Rates Despite Significant Student Service Investments

Average Five-Year Graduation Rates
Public and Private US Universities

- 2004: 52.0%
- 2005: 52.0%
- 2006: 52.0%
- 2007: 52.0%
- 2008: 52.0%
- 2009: 52.0%
- 2010: 52.0%
- 2011: 52.0%
- 2012: 52.0%
- 2013: 52.6%
- 2014: 52.6%
- 2015: 52.6%

College Completion Rates Decline More Rapidly

“...The nonprofit clearinghouse is able to track 96 percent of students nationwide. It found an overall national completion rate of 52.9 percent for students who enrolled in the fall of 2009. That rate was down 2.1 percentage points from that of the previous year's cohort of students, according to the clearinghouse, and the rate of decline is accelerating.”


Average growth in student services spending per student FTE AY 2001-2011: 11%
Discounting: A Double-Edged Sword

Increasing Institutional Grant Aid Flattening Revenues at Privates

Institutional Aid Comprising a Greater Share of List Price at Four-Year Privates...

*Per Capita Tuition Revenue and Institutional Grant Aid*

![Graph showing the increase in institutional aid as a percentage of list price from 2003 to 2013.](image)

- **2003**: 36%
- **2013**: 45%

9.1 point growth

...Reaching a Point of Desperation for Many

*Privates with Discount Rates Above 50%*

- **2003**: 13%
- **2013**: 45%

Watch Out: Publics now mastering discounting and are at the level that privates were pre-recession

Sources: IPEDS Database, National Center for Education Statistics; EAB Analysis.
A Slow and Steady Decline

Not All Private Colleges Doing the Same in New Budget Reality

Tuition Revenue Growth Slows Post-Recession

*Tuition Revenue Per Capita Growth Rates, Pre- and Post-Recession*

<table>
<thead>
<tr>
<th></th>
<th>2002-2007</th>
<th>2008-2013</th>
</tr>
</thead>
<tbody>
<tr>
<td>All Schools</td>
<td>3.2%</td>
<td>2.3%</td>
</tr>
<tr>
<td>Public</td>
<td>4.5%</td>
<td>3.8%</td>
</tr>
<tr>
<td>Private</td>
<td>2.4%</td>
<td>0.9%</td>
</tr>
</tbody>
</table>

Minimal Tuition Revenue Growth for Regional Privates

*Average Tuition Revenue per Capita Growth Rates, 2008-2013*

<table>
<thead>
<tr>
<th></th>
<th>2008-2013</th>
</tr>
</thead>
<tbody>
<tr>
<td>Stable Privates n=95, SAT=1350, Net Price=$31K</td>
<td>2%</td>
</tr>
<tr>
<td>Regional Privates n=573, SAT=1135, Net Price=$22K</td>
<td>0.2%</td>
</tr>
</tbody>
</table>

Missed Target

3% annual growth rate required for sustainable financing according to Moody’s

Cost-Savings Measures a One-Time Windfall, Not a Panacea

Struggling to Meet Consultants’ “Best Case” Savings Targets

4.30%

Average “best case” savings estimate provided to institutions engaged in consultancy-led efficiency audits

2.03%

Actual savings as a percentage of total operating budget achieved

“Cost containment is an important issue, but once you’ve achieved it, you won’t become more efficient every year. At some point there has to be revenue growth.”

Higher Education Analyst Credit Rating Agency

Administrative Labor Under Intense Scrutiny

2014 Delta Cost Report Focuses on Growth in “Administrator” Ranks

Number of FTE Faculty and Instructional Staff per FTE Professional

<table>
<thead>
<tr>
<th>Type</th>
<th>2000</th>
<th>2012</th>
</tr>
</thead>
<tbody>
<tr>
<td>Private Bachelor's</td>
<td>2.5</td>
<td>1.8</td>
</tr>
<tr>
<td>Private Master's</td>
<td>2.6</td>
<td>2.0</td>
</tr>
<tr>
<td>Private Research</td>
<td>2.5</td>
<td>1.9</td>
</tr>
<tr>
<td>Public Bachelor's</td>
<td>3.3</td>
<td>2.5</td>
</tr>
<tr>
<td>Public Master's</td>
<td>3.4</td>
<td>2.5</td>
</tr>
<tr>
<td>Public Research</td>
<td>2.7</td>
<td>2.2</td>
</tr>
</tbody>
</table>

Most Growth in Student Services

However, the report also shows that the majority of salary expense growth is tied to Student Services, not Institutional Support.

“Wage and salary expenditures for student services have grown faster than other spending categories.”

Delta Cost Project
February 2014 Issue Brief

1,411

Number of professional staff laid off by colleges and universities in 2014 – as opposed to 650 faculty members

The Low-Hanging Fruit is Gone

Do We Have the Appetite to Go After Inefficiency in the Academic Enterprise?

**Space Utilization**
- Identify course access bottlenecks
- Better leverage existing space

**Course Offerings**
- Consolidate underutilized sections
- Reduce number of small courses

**Course Success**
- Expand bottleneck courses
- Redesign high-DFW courses to increase engagement

**Curricular Complexity**
- Streamline major requirements
- Reduce elective offerings

**Faculty Workload**
- Maximize capacity utilization
- Differentiate faculty workloads

### Key Metrics

- **50%** Classroom Utilization
- **33%** Underutilized Sections
- **20%** Attempted Credits Not Completed
- **30%** Students Graduating with Excess Credits
- **60%** Faculty Teaching Less than Standard Load
Going After More Mature Markets

Adult Undergraduates To Grow Twice as Fast as Traditional Students

The Degree Completion Opportunity

U.S. Population by Education Level

- 87.4M High School or Less
- 34.2M Some College, No Degree
- 19.7M Associate's Degree
- 40.6M Bachelor's Degree
- 22.8M Graduate Degree

54 million adults have some college or associate’s

50% say they want to go back to school – only 3% do so

Adult Undergrad Students at Four-Year Institutions

- Undergrads Aged 18-24: 5.9M (2011), 7.6M (2021 proj.)

0.9% Projected annual growth, 2011-2021

2.2% Projected annual growth, 2011-2021

Master Surpasses the Student

Graduate and Professional Programs Growing Faster than Baccalaureate

Projected Growth by Award Level
2012–2013 to 2022–2023

- Bachelor's: 17%
- Master's: 36%
- Doctorate: 24%

Current and Projected Degree Completions by Award Level

<table>
<thead>
<tr>
<th>Award Level</th>
<th>2012-13</th>
<th>2022-23</th>
</tr>
</thead>
<tbody>
<tr>
<td>Bachelor's</td>
<td>66%</td>
<td>63%</td>
</tr>
<tr>
<td>Master's</td>
<td>28%</td>
<td>31%</td>
</tr>
<tr>
<td>Doctorate</td>
<td>6%</td>
<td>6%</td>
</tr>
</tbody>
</table>

1,934 Number of graduate programs added between 2011-2013

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4. Implications for Strategic Planning
# The End of Information Asymmetry

When an Experience Becomes A Commodity – Or a Transaction

## Buying a Car: Then and Now

<table>
<thead>
<tr>
<th>1989</th>
<th>2016</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Salespeople Have Exclusive Access to Product Details</strong></td>
<td><strong>Readily Available Information Shifts Power to the Consumer</strong></td>
</tr>
</tbody>
</table>

### Consumer

**Financials:**
- Sticker Price
- Personal Budget

**Priorities:**
- Safety
- Towing and Storage Space
- Reliability
- Color: Red

### Salesperson

**Financials:**
- Invoice Cost
- Financing Options

**Safety:**
- Rating
- New Airbags

**Towing and Storage**
- Competitor Specs

**Reliability**
- Repair frequency
- Cost to repair

**Color**
- Availability of other colors

### 2016

- Invoice price
- Rebates
- Shows distribution of prices paid

- Dealers bid for sale
- Buyer selects most favorable deal

- Reliability data
- Safety ratings

- Aggregated car availability
- Specs for all models

College Scorecard: 2015 Only the Beginning

From “Quality Assurance” to “Consumer Protection”

High Utilization of Federal Scorecard Itself Uncertain...

College Scorecard (Selected Measures)

Loan Repayment Rates
- Share of Students Making Progress in Paying Loans within 3 Years of Leaving College
- Improvement on Default Rate

Earnings
- Average Income 10-Years-Out
- Percentage of Students Earning Over $25,000 6-Years-Out

... But More Aggressive Accountability Measures Still on the Table...

Ratings tied to federal funding in the future?

Some trade associations expressing tentative support

... And Part of Larger Student Shopping Shift

Data incorporated into emerging consumer information sources

Re-defining what “ROI” shopping means

Information previously unavailable to public

Data considered inaccurate, unrepresentative, and misleading

Volume of information difficult to navigate

The Rise of “Outcomes Shopping”?  
Proliferation of Rankings and Search Tools Based on Career Outcomes

New Resources to Measure ROI Emerge Post-Recession

<table>
<thead>
<tr>
<th>Year</th>
<th>Source</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>2010</td>
<td>PayScale</td>
<td>College salary and ROI reports</td>
</tr>
<tr>
<td>2012</td>
<td>College Measures</td>
<td>State-level salary data for VA, AR; later expanded to CO, FL, TN, TX</td>
</tr>
<tr>
<td>2013</td>
<td>Forbes</td>
<td>Alumni giving as indicator of outcomes, ROI</td>
</tr>
<tr>
<td>2014</td>
<td>LinkedIn</td>
<td>Placement rate at top companies in hot industries</td>
</tr>
<tr>
<td>2015</td>
<td>The Economist</td>
<td>Value added vs. predicted salary</td>
</tr>
<tr>
<td>2015</td>
<td>Brookings</td>
<td>Colleges’ value added based on Scorecard data</td>
</tr>
</tbody>
</table>

College Scorecard Now Front and Center in Online Search

- Median earnings 10 years out; Percent students earning >$25K

Students Recognize that ROI Varies Significantly by Discipline

### Median Annual Wages of College-Educated Workers Age 25-29 by Major Supergroup

<table>
<thead>
<tr>
<th>Major Supergroup</th>
<th>Median Annual Wage</th>
</tr>
</thead>
<tbody>
<tr>
<td>STEM</td>
<td>$76,000</td>
</tr>
<tr>
<td>Health</td>
<td>$65,000</td>
</tr>
<tr>
<td>Business</td>
<td>$65,000</td>
</tr>
<tr>
<td>All majors</td>
<td>$61,000</td>
</tr>
<tr>
<td>Social sciences</td>
<td>$60,000</td>
</tr>
<tr>
<td>Career-focused</td>
<td>$54,000</td>
</tr>
<tr>
<td>Arts, liberal arts, and humanities</td>
<td>$51,000</td>
</tr>
<tr>
<td>Teaching and serving</td>
<td>$46,000</td>
</tr>
<tr>
<td>High school graduate</td>
<td>$36,000</td>
</tr>
</tbody>
</table>

### An Information Experiment

- Sample of students asked to predict their earnings at age 30
- Students then exposed to data showing their major’s expected earnings
- Percentage of students who decided to change major in response to earnings data: **12%**

**Difference in lifetime earnings between highest and lowest-earning major ($3.4M) exceeds difference between college and HS degree ($1M)**

Worse than We Thought

Student Disciplinary Clustering
Certified Instructional Programs, Four-Year Not-for-Profits, 2012

>40% of degrees granted by 10 of 362 programs

~70% of freshmen apply to one of 10 programs

Impact of out of state, international students, and historically underrepresented minorities?

Changing Program Enrollments at Michigan State University
Undergraduate Enrollment by College, 2003-2015

Impact of out of state, international students, and historically underrepresented minorities?
The Economic Value of a Liberal Education

Don’t Be Misled by Early Career Earnings Data

The Mythical College Graduate Barista

Unemployment Among People with a Terminal Bachelor’s Degree, 2013

<table>
<thead>
<tr>
<th>Field</th>
<th>Recent Graduates (Ages 21-25)</th>
<th>Peak Earning Years (Ages 56-60)</th>
<th>Earnings with Advanced Degree</th>
</tr>
</thead>
<tbody>
<tr>
<td>Humanities and Social Science</td>
<td>$26,271</td>
<td>$86,550</td>
<td>$120,110</td>
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<tr>
<td>Professional and Pre-Professional</td>
<td>$31,183</td>
<td>$78,363</td>
<td></td>
</tr>
<tr>
<td>Physical and Natural Sciences, Math</td>
<td>$25,986</td>
<td>$64,149</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>$66,185</td>
<td></td>
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10% more likely to obtain an advanced degree than Professional majors

Wage Gaps Close Between Liberal Arts and Professional Majors

Median Salaries of Recent College Graduates and at Peak Earnings

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<td></td>
<td>$66,185</td>
<td>$85,735</td>
<td>$86,550</td>
</tr>
</tbody>
</table>

The Difficulty of Chasing “Hot Jobs”

The Case of Petroleum Engineers in the U.S.

Hydraulic Fracturing (Fracking) Unexpectedly Revitalizes Oil Industry

Declining Oil Prices Lead to 6,800 Fewer Jobs in H1 2015

Supply of Petroleum Engineering Graduates

Responding to Industry Need, Universities Begin Multi-Year New Program Launch Process

Students Enroll with Expectation of Six Figure Salaries

Graduating Students Receive Withdrawals on Job Offers

“...The economy bounces all over the place in terms of jobs that we hear are ‘hot’ all the time, like tech jobs. The reason that they’re hot is precisely because you can’t predict them.”

Peter Cappelli, Professor, Wharton School of Management

Enhancing the Liberal Arts

Improving Career Outcomes without Sacrificing Broader Educational Goals

**New Track or Minor in Major**
- Publishing and Editing
- Susquehanna University
- Mount Holyoke

**Add-On Content from Another Unit**
- Professional Edge
- New York University
- Professional Bootcamp
- Fullbridge

**Joint Program Across Two Units**
- CS + Humanities
- Stanford University
- Business and German
- Elon University

Source: EAB interviews and analysis.
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Strategic Plans Too Often A Declaration of Values, Not a Roadmap Toward Differentiation

Percentage of Strategic Plans That Include Indicated Strategic Goal

All = 97%
94%
94%
88%
78%
59%
56%

0%
100%

Academic Excellence
Student Success
Secure Finances
Student Satisfaction
Community Ties
Increase Research
Organizational Processes

- Academic Excellence
- Student Success
- Secure Finances
- Student Satisfaction
- Community Ties
- Increase Research
- Organizational Processes

ALL
SLA
ACC
Ohio

(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.

Source: Education Advisory Board interviews and analysis
“Our Most Important Stakeholders are Students, Faculty, Staff, Alumni, and the Community”

Priority Creep and Initiative Proliferation Turns Strategic Plan Into a Wishlist that Disperses, not Concentrates, Resources

Number of Total Initiatives (Per Plan)

- <10: 13%
- 10 to 19: 34%
- 20 to 29: 25%
- >40: 28%

Number of Individual initiatives (Per Plan by Category)

- Academic Programs: 2.6
- Faculty Development: 2.4
- Infrastructure Upgrades: 2.2
- Student Learning Outcomes: 1.8
- Community Engagement: 1.6
- Institutional Reputation: 1.4
- Research: 1.4
- Administrative Processes: 1.3
- Financial Management: 1.1
- Diversity: 1.0

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

Source: Education Advisory Board interviews and analysis
A New Paradigm

Shifting Our Perspective on Resource Allocation

From Enhancing Quality Everywhere....

- Maximizing inputs
- The only way to improve quality is to spend more
- Same performance expectations for all departments and faculty

...To Targeted Investments in Excellence

- Maximizing outcomes
- The only way to improve quality is to focus on what works
- Differentiated roles and workloads based on ability to contribute
- Growing every department, student population, and program at the same rate will lead to mediocrity
- Resources should be allocated fairly
- Resources should be allocated effectively
- Institution-wide alignment of resources with priorities
Inclusive Nature of Strategic Planning Often Results in Broad Goals

...Often Leads to Goals That Lack Specificity

Example goals from University of North Carolina at Greensboro strategic plan:

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

Source: Education Advisory Board interviews and analysis
Strategic Plan Approved by Board 29 Goals

A Focusing Process
Implementation Teams Bring Definition to Broadly-Stated Strategic Plans

Step 1: Action Item Reports
(Action items, KPIs, and benchmarks)

Step 2: Resource Reports
(Financial, data, and space needs)

Step 3: Implementation Begins

Chancellor Assigns Teams 29 Goals

Chancellor Activates 19 Goals

Chancellor Funds 7 Goals

SP Committee

Chancellor and Strategic Plan Implementation Teams

1) The Dean’s Council recommends to the Chancellor which goals should be activated.

Source: Education Advisory Board interviews and analysis
Defining Action Items and KPIs Helps Chancellor Decide What to Activate

**Strategic Plan Goal**

*SP Committee*

- Make UNCG the First Choice of More Students

**Action Items Established**

*Implementation Team*

- Increase Honors College profile
- Improve recruitment materials
- Student-designed major

**KPI Targets Determined**

*Implementation Team*

- % of students applying to honors college
- % of high achieving students enrolled
- GPA/SAT of students inquiring
- Program retention %

**Offer Online Degree Courses**

- Launch online M.S. in IT Management
- Develop guidelines for how oversight accomplished

**KPI Targets Determined**

- # of degree programs online each year
- # of online courses in inventory
- Not yet established

Source: Education Advisory Board interviews and analysis
Defining the Requirements

Financial, Space, Faculty, and IT Requirement Specificity Enables Accurate Planning

Key Areas of Resource Requirement Definition at UNCG

Financial Needs

- **3-Year Projections:** Define annual and total costs as well as revenue or cost-savings potential

- **Funding Sources:** Determine most appropriate source—state recurring, state one-time, or discretionary—for each action item

Space and Faculty Needs

- **Space and Seats:** Identify support space (i.e. conference room, analytical core lab), seat-use frequency, and specialized equipment

- **Collaboration Potential:** Establish if space:
  - Needs to be near existing
  - Can be shared
  - Can be off-campus
  - Will impact classroom scheduling

- **Position Specificity:** Specify positions (i.e. adjunct, web designer) and spatial need (private office, bullpen)

IT and Data Needs

- **Services Required:** Establish IT support provider (i.e. central, contracted)

- **Data Focus:** Define if and where metrics and reporting exist (i.e. Banner, IR)

- **Back-up Plan:** If services, data, or reporting do not exist, develop cost estimates

Source: Education Advisory Board interviews and analysis