# Strategic Planning Updates

## Fitchburg State University

### September 2, 2014

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# THE PLANNING STRUCTURE

## at Fitchburg State

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# The Charge

**Develop a strategic plan that:**

- **Is based on rigorous analyses of assets, traditions, and potential**

- **Is characterized by transparency and stakeholder participation**

- **Tackles tough issues**

- **Avoids personal agendas and predetermined notions**

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# The Charge cont'd.

- **Focuses on what is best for the university**
- **Embraces change that is necessary to promote and preserve what is best about Fitchburg State**
- **Is widely understood**
- **Can be implemented in a reasonable timeframe**

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# Organization

- **Authority: fiduciary responsibility; laws; by-laws**

- **This is ultimately the plan of the Board of Trustees and must be approved by the Board**

- **The Board has welcomed our participation and input into this process to be organized as follows:**

    **Organization: Executive Planning Council (EPC); Strategic Planning Committee (SPC); working group subcommittees**

# Organization

**Executive Planning Council (EPC) has nine members;**

- Paul Weizer, Interim VPAA, chair
- Jay Bry, VP Finance & Administration, vice chair
- Stan Bucholc, Dean of Students and Academic Life
- Three faculty members appointed by the MSCA (Jane Fiske, Aruna Krishnamurthy, and David Rice)
- Two trustees (Martin Connors and Michael Mahan)
- APA representative (Sherry Horeanopoulos)
- President Antonucci, *ex-officio*
- Anthony Wilcox, Director of Institutional Effectiveness and Research, *ex-officio*
- Pam McCafferty, Dean of Enrollment Management, *ex-officio*

# Organization

**Strategic Planning Committee (SPC);**

- **Members appointed by the president and unions**
- **Chaired by one of the faculty members on the EPC—Jane Fiske**
- **Will have 19 members:**
  - **8 faculty (the 7 working group chairs plus Jane)**
  - **8 administrators**
  - **1 APA representative—Jamie Roger**
  - **1 AFSME representative—Karen Valeri**
  - **1 student representative—Nathan Gregoire**

# Working Groups

- All meetings of the working groups are open to the campus community
- Working groups (and chairs) include:
  - Academic Planning—Randall Grometstein
  - Academic Values—Meg Hoey
  - Community—Beth Walsh
  - Financial Structure—Sean Goodlett
  - Marketing—Mike Greenwood
  - Student Services—Christine Shane
  - Technology—Kisha Tracy

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# Working Groups

- Working group membership includes:
  - **Academic Planning—Randall Grometstein, Lisa Gim, Jeff Godin, Linda LeBlanc, Chris Picone, Sam Tobin, Mike Turk, Karen Valeri, Cathy Canney, Jannette McMenamy, Skarlet Ramirez (student representative)**
  - **Academic Values—Meg Hoey, Ben Railton, Rene Reeves, Marcel Beausoleil, Annette Sullivan, Robert Pijewski (student representative)**
  - **Community—Beth Walsh, Josh Spero, Rob Carr, Renee Scapparone, Chris Hendry, Dan LaFond (student representative)**
  - **Financial Structure—Sean Goodlett, Tim Hilliard, Mike Nosek, Audrey Pereira, Cathy Daggett, Shylah Maloney (student representative)**
  - **Marketing—Mike Greenwood, Mary Baker, Lynne Kellner, Jessica Murdoch, Jamie Roger, Michael Papanikolau and Jean Trocquet (student representatives)**
  - **Student Services—Christine Shane, Megan Krell, Cheryl Goldman, Rala Diakite, Hank Parkinson, Nathan Gregoire and Alexandra Valdez (student representatives)**
  - **Technology—Kisha Tracy, Charlie Roberts, Jason Simon, Peter Staab, Steve Swartz, Jennifer Lyons (student representative)**

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# THE SCHEDULE

## at Fitchburg State

# Schedule

## Overview

- **Spring 2014—organization, agenda development, idea generation**

- **Summer 2014—reflection and research**

- **Fall 2014—SPC focus—white papers and draft plan**

- **Spring 2015—EPC: plan refinement, communication, Board approval**

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# Roles That Apply to All Participants

- Make sure that each individual takes an institutional view in addition to views growing out of his or her role within the university or his or her disciplinary expertise
- There will be disagreements, so be prepared to engage in the dialogue necessary to resolve them or, to agree to disagree
- Develop and use data or other reasonably objective information, to the extent possible
- Plan for 5 or more years from now, not for today

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# September-November: Working Groups

- Develop shared answers to the questions.

- What changes are suggested (implied, desirable, imperative) based on the answers or where is re-affirming the status quo the right thing?

- Place them in priority order based on strategic importance (greatest impact, key to achievement of the mission).

- Each working group will identify two to four key issues (highest priority) and hit them the hardest.

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# September-November: Working Groups cont'd.

- Many good ideas that are not necessarily strategic will come out of the questions. They may be a matter of better operational implementation, execution, or coordination. These should not be lost and should be acted on in due course.

Deliverable by Nov. 15:

- A white paper of four to six pages that identifies key issues and makes a series of recommendations about how to deal with them.

- White Papers to be posted on the web site after submission to the SPC.

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# November-December: SPC

- Review and discuss white papers from working groups

Deliverable by Dec. 1:

- a concise 10-12-page first draft of a strategic plan for Fitchburg State University that:

- identifies positive actions,

- is consistent with the Massachusetts Vision Project,

- takes into account the university's multiple constituents,

- and can be used for making decisions.

# EPC: December - January

- Receive draft plan by December 1 and identify necessary revisions and engage in dialogue with the SPC regarding any revisions

- Communicate carefully with the Board about the direction and content of the draft plan and revise to accommodate important trustee concerns

- Present the draft plan to the campus and wider community and communicate potential or likely changes between this draft and the final

# Working Groups Summaries

# Admissions/Marketing Working Group

1. To perform a detailed analysis of enrollment trends—past, present and projected—followed by an evaluation of marketing and admissions strategies. The initial segment of the assessment will focus primarily on private and public higher education in Massachusetts, with particular emphasis on institutions that enroll students with profiles similar to those we attract. This approach will offer a preliminary sense of the relative success of our efforts, since it will take into account the level of demographically based fluctuation. From there, discussion and research can broaden to include such issues as reassessing core messages, web and social media analytics, and evaluation of internal admissions and marketing structure and strategies.

2. Establish the brand-marketing concept that identifies the primary and secondary value proposition for prospective and current students.

3. Align the design of print and electronic marketing communications through the use of rigorous marketing policies and guidelines resulting in the University communicating in "One Voice."

4. Identify and establish what makes Fitchburg State special and unique. Then drive marketing communications that align with these differentiators.

5. Consider the on-going value of a focused media campaign targeted to our key demographic cluster and expanding to new demographic clusters in order to respond to changes in the U.S. population.

6. Review the current marketing and communications organizational models used within the state university system campuses. Evaluate the pros and cons of Fitchburg State adopting marketing communications best practices in place at other state university campuses.

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# Academic Planning

Refined mission statement:

- Overarching question: Consistent with our university's mission as a comprehensive university, how do we define ourselves as a learning institution (as we've moved from a college to a university, and given the changes coming in the future)?

  - How do we strategically plan so our students are armed for the future? (What skills do they need for grad schools, employers, technology literacy, etc.? We can address LA&S here.)

  - How do we improve admission, retention, and completion? Curricula, online learning, scheduling, competency-based assessments, demographics; learning methods (incorporating students and faculty), delivery methods?

  - What process or standards would be appropriate for assessing and planning academic programs for the future?

**Academic Values Working Group**

Met on May 27, July 24 and August 25

Status: The original charge questions resulted in campus-centered discussions rather than a consideration of the broader national issues facing our campus. After two meetings it became clear that the suggestions coming forward, while often excellent, were operational in nature, not strategic. The committee was faced with the possibility that their work would not contribute to the final plan.  After some discussion, a decision was reached to refocus the charge of the working group.

Revised Charge

1.  We identify ourselves primarily as a teaching institution that blends both liberal arts and professional programs in a small college setting. How do we address the changes in faculty work that are taking place on a national basis?

2. How do we define a LA&S education in this environment? Has that definition changed or should it change? Does becoming a University modify our values? If so, how?

3. How do we ensure that we match these values with our student population and their needs?  From the viewpoint of the student, how are these principles reflected in their academic training?

4. Will the current LA&S program suffice as we move toward a more diversified higher educational environment?
   a.  Does our current definition of a LA&S education prepare them for a global world?
   b.  Is there a different way to instill the values of a LA&S education?  Do we need to modify our general education approach to accommodate the need for students to have specific job skills when they graduate?
   c.  Are there other defining features we should include in our general education curriculum?

# Overview of Summer Activities

➢ Conducted six meetings during May-August 2014

➢ Discussed a series of topics and narrowed the focus of the committee to the following three areas:

- Focus on increased service learning and internship opportunities in the local (Fitchburg) community

- Engagement of local community

- Economic Development

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# Finance

- Three main areas of focus:  net revenue increases, cost reductions/containment, and debt.
- Some ideas discussed include:

**Academic Program Development**—the final summer meeting of committee concluded with a brief discussion of the need to grow student enrollments through academic program development; committee members agreed that we will want to introduce programs like game design, which attract new students and do not "poach" from the existing student body. This will be the leading topic of discussion when the committee reconvenes in September.

**Differentiated Fee Structures**—research on the price elasticity of demand revealed that students in certain majors (e.g., engineering) are more willing to pay higher tuition and fees, almost certainly because they expect a greater return on their investment.3 Two ideas arose from this: first that we might explore a fee structure based upon the major (especially where those majors tend to be cost-intensive, like, e.g., nursing and film and video), and second that we might introduce *à la carte* pricing for extra-curricular activities like sports.

**Cost-Reduction in Academic and Non-Academic Departments**—a recurring theme in our discussions was the need to scale back or eliminate a select number of academic programs and to trim or eliminate inefficient or redundant non-academic departments. Rather than making specific recommendations, the committee settled on developing frameworks for making such decisions.  Again, when it comes to academic programs a review might be necessary if a program is not generating sufficient revenues to cover its direct expenses in the Day and DGCE units and if its curriculum is insufficiently "stable" —as measured potentially by excessive waivers. Similarly, the committee has discussed a framework for non-academic staffing cuts that relies upon national benchmarks for staffing levels and which seeks to eliminate redundancies and inefficiencies.

# Student Services

- **Diversity and Underserved Populations**

    "Fitchburg Family," Student Community Ambassadors, International Students and Immersion Programs. Veterans.

- **The Changing Needs of Modern Students**

    Millennial's and technology. Improved hours of operation for students and families, increase diversity of teaching and learning styles, competency-based curriculum, more focus on academic and counseling needs of students. Freshman Programs and Professional advising. Case management.

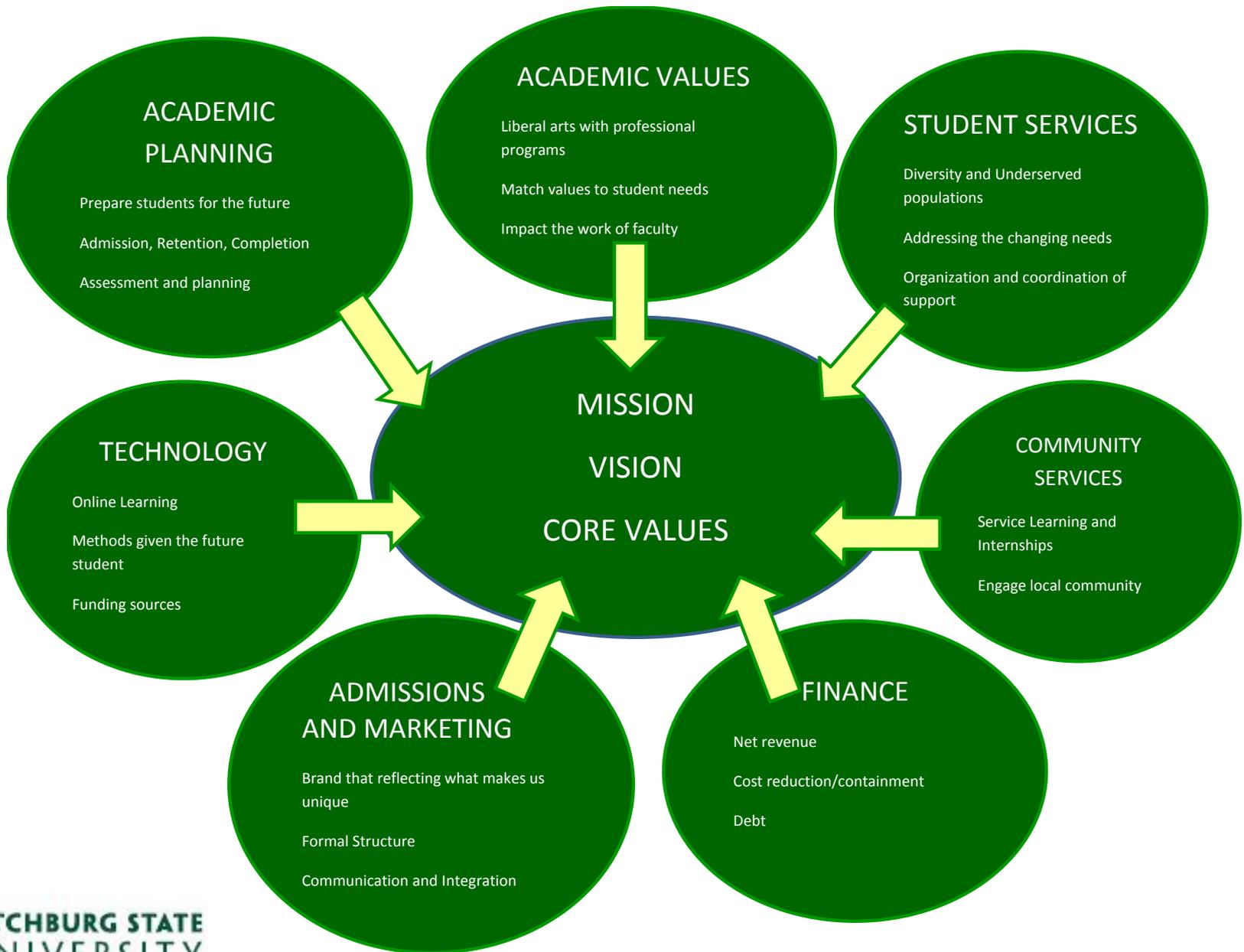- **Organization/Coordination of Student Services: Resource Allocation**

    Reorganization of Student Services, VP of Student Services, $$, realignment of Academic Support and Student Services.

- **Best Practices Compliance**

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# Technology Working Group

**Identified Priorities for Moving Forward**

➤ Should we have a more systematic plan for the future number and types of **online classes** that the university will offer? What should that **plan** look like?
- What **brand** do we want for the university (i.e. online courses/programs, distance learning, blended/hybrid, etc.)?

➤ Define new and more effective **metric mechanisms** as well as methods of communication, especially taking into consideration what a "future student" will look like.
- What instructional technologies are being used by faculty? Are faculty aware of current instructional technologies?
- How much of the faculty feels that technology is fully integrated into their pedagogy?
- How are faculty supported in considering pedagogical theories and applications of instructional technologies?
- Is there a pattern of increasing demands for technology support from the academic programs of the University?
- What information do we need to know about online and distance learning courses?
- Is there more information we need about library services?
- What technologies are students using/preferring to use/going to use?

➤ What have been the **funding sources** (one-time capital investment, on-going additions to the operating account, etc.) for technology? Is the process of allocation of funding effective? Should there be a **clearer method of prioritizing funding**?

ACADEMIC PLANNING
- Prepare students for the future
- Admission, Retention, Completion
- Assessment and planning

ACADEMIC VALUES
- Liberal arts with professional programs
- Match values to student needs
- Impact the work of faculty

STUDENT SERVICES
- Diversity and Underserved populations
- Addressing the changing needs
- Organization and coordination of support

TECHNOLOGY
- Online Learning
- Methods given the future student
- Funding sources

MISSION
VISION
CORE VALUES

COMMUNITY SERVICES
- Service Learning and Internships
- Engage local community

ADMISSIONS AND MARKETING
- Brand that reflecting what makes us unique
- Formal Structure
- Communication and Integration

FINANCE
- Net revenue
- Cost reduction/containment
- Debt

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# Web Site and E-mail

- We have established an email address for the community to send thoughts—StrategicPlan@fitchburgstate.edu
- We also have a dedicated web site at: http://www.fitchburgstate.edu/strategicplan/ This site includes:
  - A schedule for all meetings throughout the process
  - Meeting minutes
  - A list of suggested readings and selected articles on larger higher education issues and trends
  - Data, data, data
  - Our NEASC self-study from 2012
  - PowerPoint presentations from open sessions

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# Most Importantly

- ## Get Involved

- This process can't work without broad participation

- All thoughts, ideas, and suggestions are welcomed

# Q & A