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California Lutheran University Community Day
November 18, 2021

Jennifer deCoste | *Vice President for Leadership Strategies*
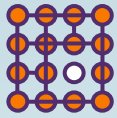**Maggie Conklin** | *Project Manager*

Today's Agenda

- **Shifts in Higher Education**
- **The Thriving Framework**
- **Brainstorming Session**

We're a Consulting Firm for Independent Higher Ed

440+

Independent college and university partners since 1995

120+

Campuses engaged per year

275+

Partner projects per year

4

Divisions focused on leadership & strategy, student success, enrollment, and campus planning & architecture
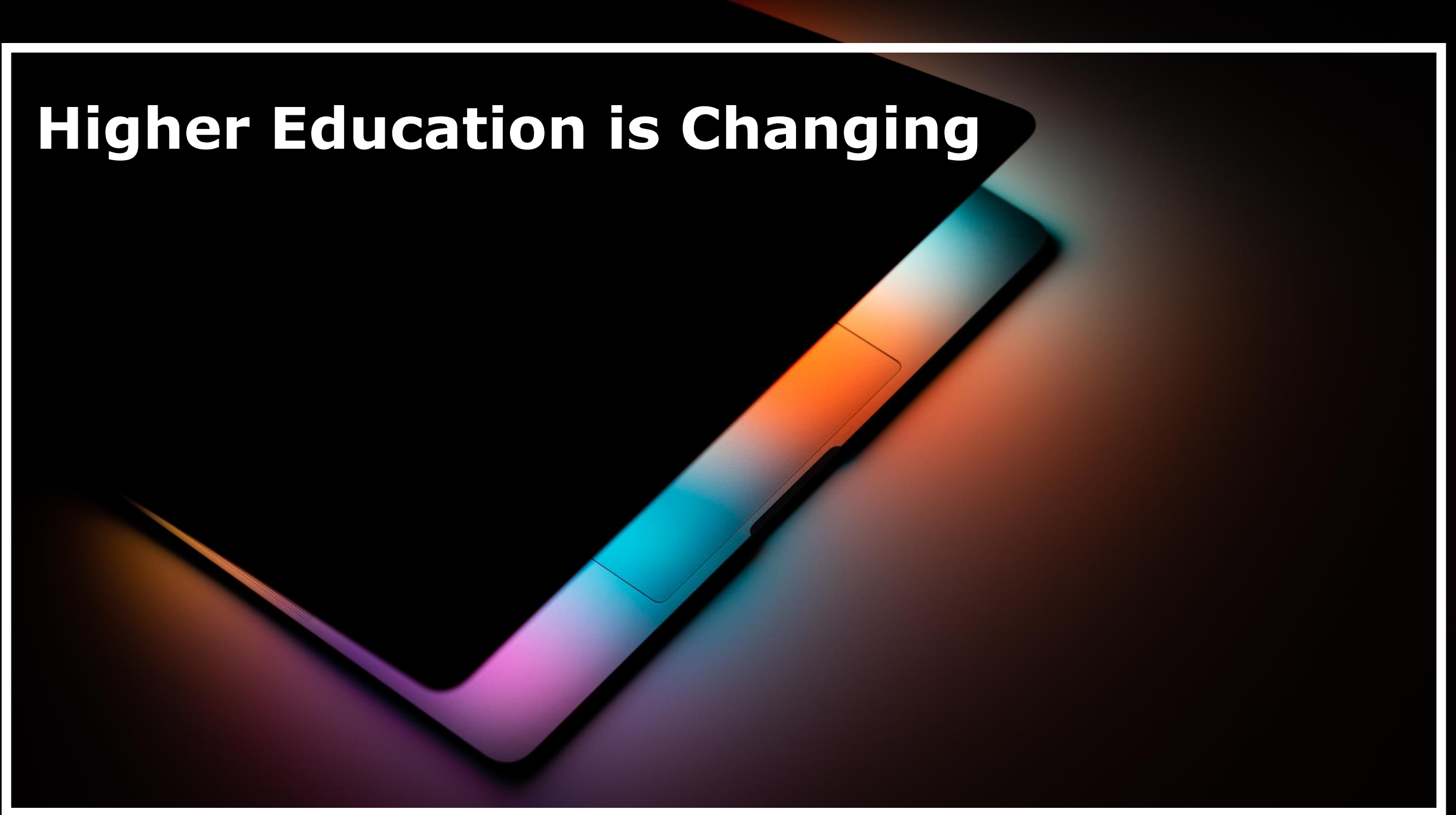
45+

Consultants, project managers and passionate higher education experts on the Credo team
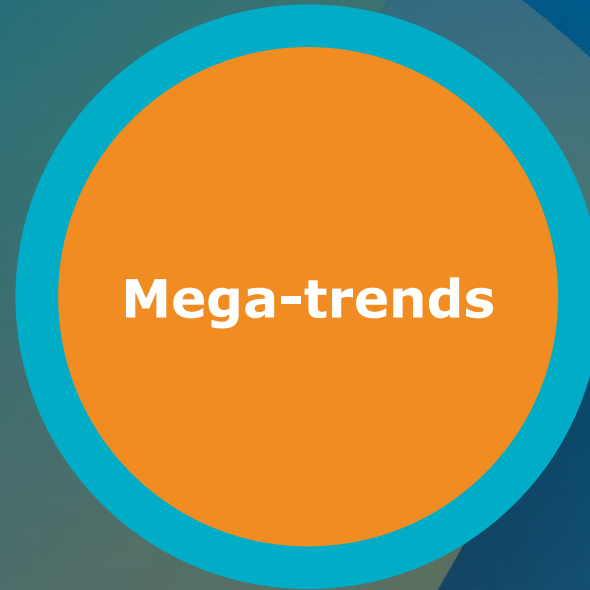
100+

Sitting vice presidents, deans and directors from campuses around the country in our affiliate network

Higher Education is Changing

What's Changing?

Mega-trends

Demographics | Technology | Learning

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And more

Demographics | Technology | Learning
Cost & Affordability | Ideological Divide | Regulatory Uncertainty
Outcomes Focus | Retention Stagnation | Value of Higher Ed

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And even more

Demographics | Technology | Learning
Cost & Affordability | Ideological Divide | Regulatory Uncertainty
Outcomes Focus | Retention Stagnation | Value of Higher Ed
Diversity & Social Justice | Liability | Free Speech Issues
Media Coverage | Data Security | Enrollment Decline
Unbundling | Business Model | Career Readiness
Title IX | Academic Governance | Student Mental Health
Commoditization of Higher Ed

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3 big shifts

Demographics

Technology

Learning in Society

Demographics

"The simple story of America is this: the rich are getting richer, the richest of the rich are getting still richer, the poor are becoming poorer and more numerous, and **the middle class is being hollowed out.**"

Joseph Stiglitz Winner of the Nobel Prize in Economics

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Technology & Data Shifts

What were you doing 20 - 30 years ago?

What technologies were you using?

Here is what you were NOT doing:

Listening to music on your phone

Watching a video on YouTube

Googling anything

Reading a book on your Kindle or iPad

Texting someone

Finding directions through GPS

Reading your email on your smart phone

Asking Siri questions like: do you love me?

Doing anything on a smart phone

New Era of Data

> "90%
> of the world's data has been generated over the last two years.
>
> (Science Daily, 2013)

A university's ability to gather and analyze big data for predictive purposes will be one of the educational game changers in the next decade.

Learning Shift

···>Agriculture

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Learning Shift

> Agriculture

> Industrial

Learning Shift

> Industrial

>Knowledge

Learning Shift

Knowledge

Learner

VISION

Thriving institutions craft a concise, compelling vision to live out their mission.

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Thriving institutions craft a concise, compelling vision to live out their mission.

- The vision is inspiring, motivating, succinct, and memorable.
- The vision and refined mission emerge after initial planning events occur.
- The institution has made the necessary collaborative efforts for the vision to be owned by all constituencies.
- The vision gives life to the strategic plan of the college or university.

Mission is **what you do**	… and is long term.
Values are **why & how you do what you do**	… and are long-term.
Vision is **where you are going**	… how you will translate your mission in this planning period.

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INSTITUTIONAL SELF-ESTEEM

Thriving institutions are proud of the work they do.

INSTITUTIONAL SELF-ESTEEM

Thriving institutions are proud of the work they do.

- Strategic investments are made in people, programs, and places.
- The campus community is consistently and strategically affirmed.
- Levels of constituency engagement are increasing.
- The institution teaches well the students it has.
- Students seek out the institution, and stay.
- Elements of regional and national visibility are leveraged.

INSTITUTIONAL STORY

Thriving institutions understand who their students are, and how to communicate the right message to them at the right time to draw them closer.
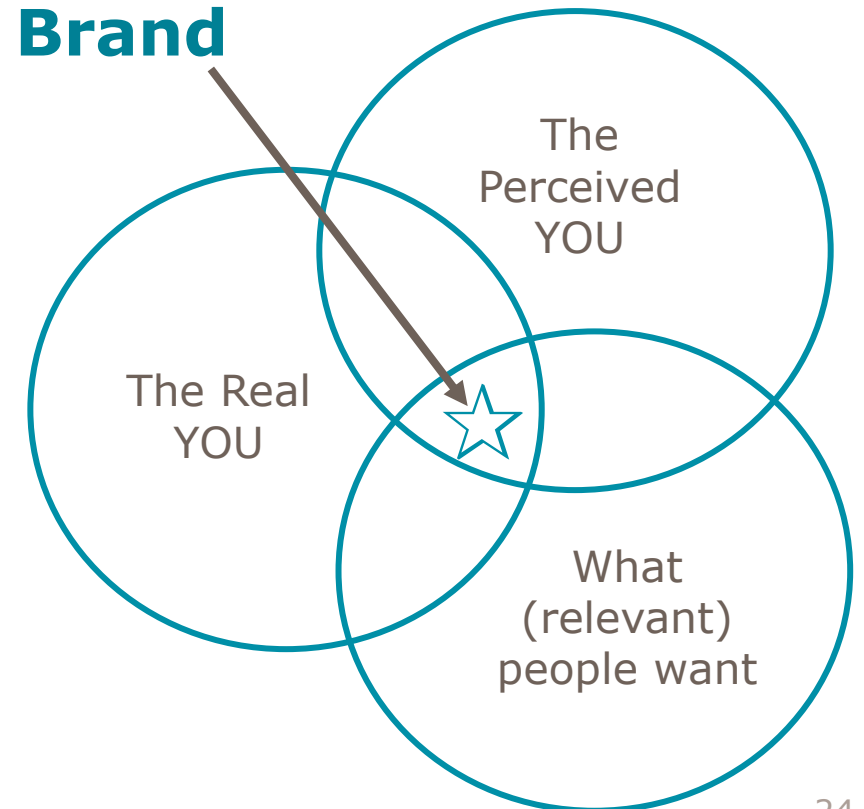
INSTITUTIONAL STORY

Thriving institutions understand who their students are, and how to communicate the right message to them at the right time to draw them closer.

- Market research is central to understanding current realities.

- There is an explicit and consistent understanding of brand and value proposition(s).

- Marketing messages are outcome driven.

- The institutional story is internally and externally shared.

- Marketing resources are organized for success.

Brand

The Perceived YOU

The Real YOU

What (relevant) people want

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COURAGEOUS & COLLABORATIVE LEADERSHIP

Thriving institutions know that urgent times call for strong leadership grounded in trust, collaboration, and action.

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Thriving institutions know that urgent times call for strong leadership grounded in trust, collaboration, and action.

- Leadership teams across campus are functional and effective.

- There is an appropriate balance between leadership and inclusivity.

- Timely decisions are made with less processing, and more efficient preparation.

- The board owns the mission and vision, and knows and executes its role appropriately.

- The board and community have been thoroughly educated about changes and trends in higher education.

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STUDENT LEARNING & SUCCESS

Thriving institutions know their students, meet them where they are, and take them to a place of their highest potential.

STUDENT LEARNING & SUCCESS

Thriving institutions know their students, meet them where they are, and take them to a place of their highest potential.

- Unwavering attention is paid to innovative teaching and learning practices.

- The institution has a strong orientation toward student service.

- Learning represents a strong integration between academic & student affairs.

- Students are engaged with high impact experiential practices at increasing levels.

- Advising is being re-envisioned and re-tooled to address life goals and vocation.

- Student success metrics are improving consistently.

NET REVENUE & STRATEGIC FINANCE

Thriving organizations recognize that the execution of their mission and vision is dependent upon financial health.

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Thriving institutions recognize that the execution of their mission and vision is dependent upon the financial health of the institution.

- The campus is **growing** and maximizing net tuition revenue.
- The student demographic of the future drives entrepreneurial thinking about alternative revenue streams.

- Metrics are established and used for adding and deleting programs.
- The budget process is conservative and predictive financial models are being used to inform decision making
- The campus is informed about financial literacy in higher education.

no margin = no mission
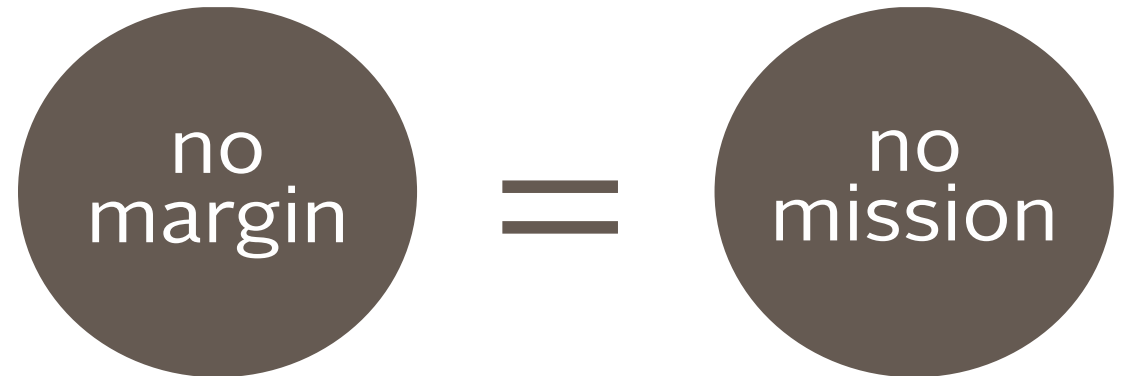
The Seven Legal Ways to get Resources

1 **Grow** more new students, better retention

2 **Raise** annual fund, campaign, major gifts, grants

3 **Borrow** bond issue, other forms of traditional financing, borrow from yourself

4 **Shift** (the hardest way) stop doing something to do something else and/or do less of one thing to do more of another

5 **Focus** get more with existing resources through training and raising awareness

6 **Alternate** create new revenue streams

7 **Partner** a continuum with cooperation on one end and merger on the other

TRANSFORMATIVE ENVIRONMENTS

Thriving institutions focus on virtual and physical spaces that are transformative to the student experience.

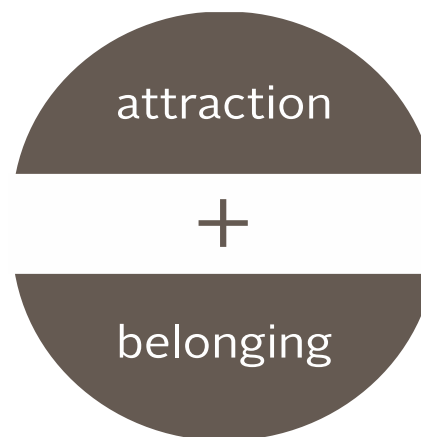# TRANSFORMATIVE ENVIRONMENTS

Thriving institutions focus on virtual and physical spaces that are transformative to the student experience.

engagement

+

community

=

student commitment

attraction

+

belonging

=

student affirmation

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TRANSFORMATIVE ENVIRONMENTS

Thriving institutions focus on virtual and physical spaces that are transformative to the student experience.

- Planning for the campus environment supports engaged learning inside and outside the classroom.

- Classrooms are being designed for multiple and creative uses.

- Physical spaces communicate the institutional story.

- Residence halls are reflective of current best practices in living and learning environments.

- The campus master plan is compelling and living and special attention is focused on "experience planning."

- There is a strong focus on curb appeal and engagement space.

- Buildings and grounds are assets, not liabilities.

- Investments in technology are firmly tied to mission and vision.

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HABIT OF REFLECTION & INTENTIONALITY

Thriving institutions habitually ask themselves if what they are doing is working, and if not, they change.
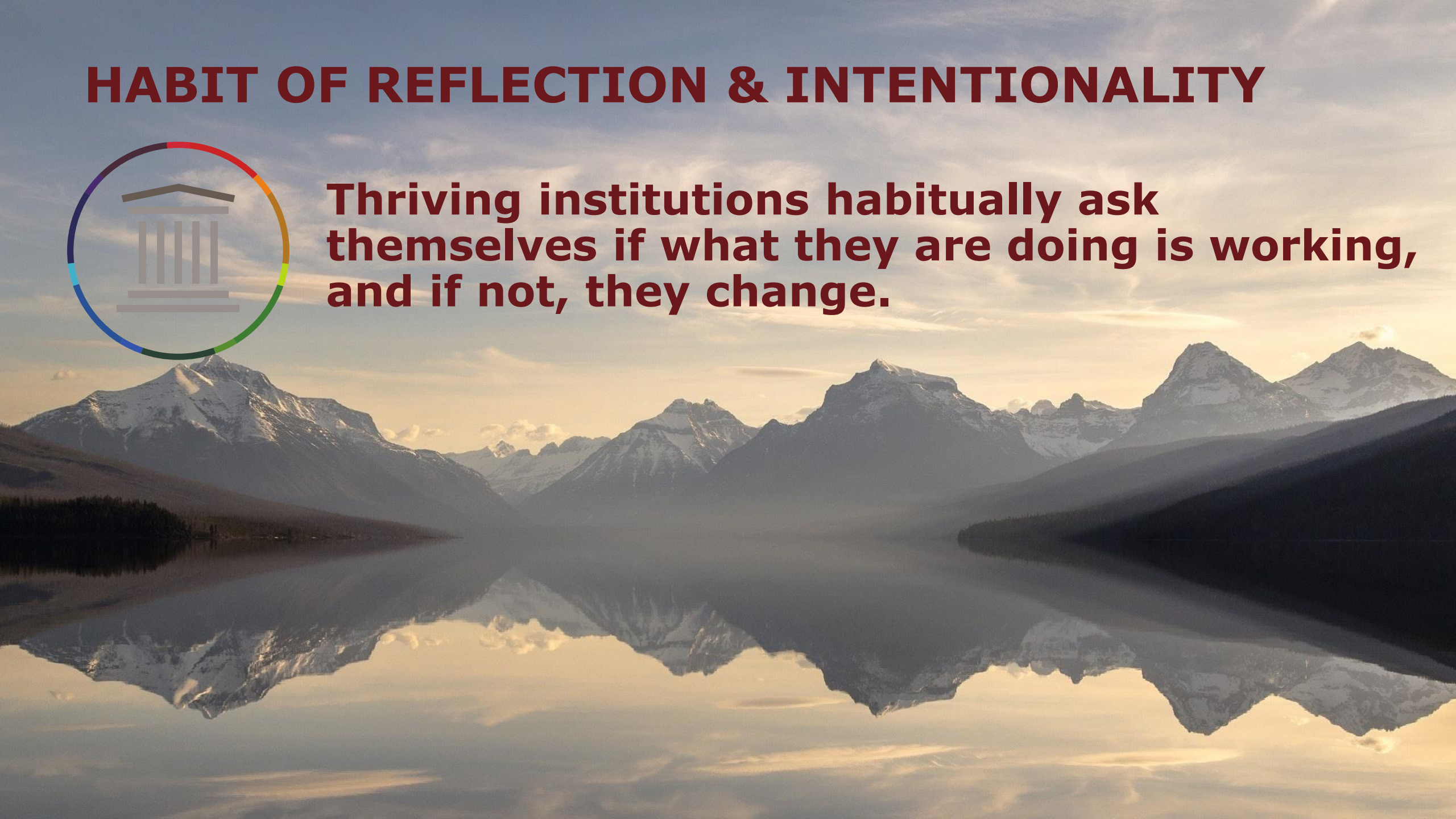
HABIT OF REFLECTION & INTENTIONALITY

Thriving private institutions habitually ask themselves if what they are doing is working, and if not, they change.

- Collected data is used strategically, evaluated for relevance and usefulness, and considered when making course corrections.

- Both leading and lagging indicators are used to evaluate progress and weaknesses.

decide → collect → act → celebrate / correct

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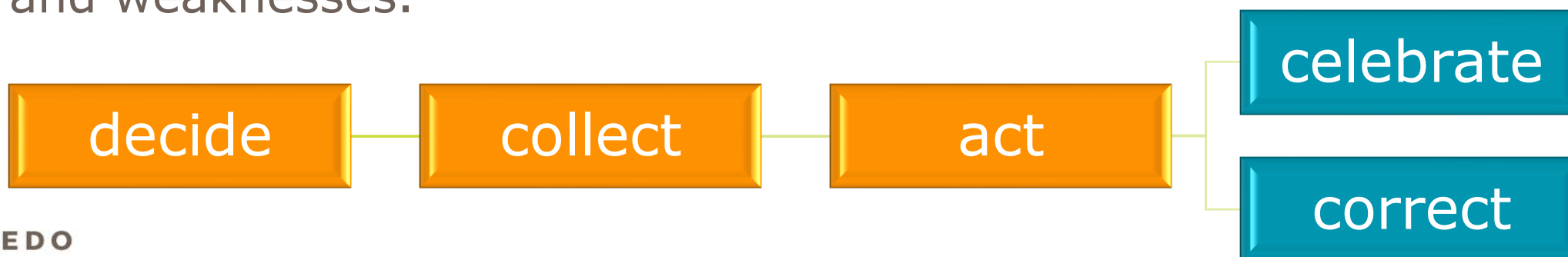
CULTURE OF PLANNING & INNOVATION

Thriving institutions create bold, living plans, paying close attention to connection and communication with the entire campus community.

Culture of Planning & Innovation

Thriving private institutions create bold, living plans, paying close attention to connection and communication with the entire campus community.

- Planning reflects clarity, transparency, and agility.
- Planning is collaborative, but efficient.
- Planning is focused around action.
- Budget planning is aligned with strategic initiatives.
- Time for innovation and strategy replaces the time for word-smithing and operational issues.

In the end, it all comes back to your students.

Strategic Planning at

California Lutheran

UNIVERSITY

Brainstorming Tips & Tricks for Today

- Differentiate between *strategic* and *operational*

  - Operational – something that helps maintain today and requires attention

  - Strategic – longer-term and future-oriented and eventually become operational

- Focus on *significance* - initiatives that will move the organization forward

- Develop a *culture* of planning rather than an episode

  - Strategic initiatives may have phases

  - Accountability cascades to all levels

- Write down all ideas – no need to debate or edit

- Dream without constraints!

- Work breaks into your brainstorming time as needed

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Theme Areas

Student Experience

Fulfilling Work Environment

Distinctive Impact

and What's Missing?

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Student Experience

This strategic planning process is prompting us to do three things:
shape Cal Lutheran's graduate and undergraduate student enrollment plans;
rethink the overall student experience;
and design multi-year "learning and earning" pipelines that help students chart career pathways.
To do these,
we must formulate an operable living and learning technology plan that
inspires all populations of students.
We must also build a flexible and intentional So-Cal specific master plan designed to maximize the
university's beautiful campus and take advantage of its mild weather.
Finally, this plan should
guide the programs and services aimed at fostering diversity, equity, and inclusion
practices that add meaning,
value, and significance to students' lives and learning.

Brainstorm initiatives which create So-Cal place-specific spaces for learning and community;
create opportunities for concrete "learning and earning" pipelines;
increase community strength through diversity, equity, and inclusion;
and take academic technologies to the next level.

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Fulfilling Work Environment

The Cal Lutheran work environment needs to explicitly recognize and invest in the people
who are at the heart of the mission.
We will structure the work environment for success, collaboration, and belonging.
Administrators, faculty, staff, and other stakeholders
can begin this work by reflecting on how to better care for one another.
As part of this culture of care,
we must recognize the challenges of our current situation.
Members of the community must hold themselves
and those with whom they work accountable,
give each other the benefit of the doubt,
and trust each other.
A healthy work environment also leverages data to
assess how and where to train, identify, and use it.

Brainstorm initiatives for helping build future-focused structures for collaboration.
These should include increasing investment in people and leadership, leaning into the new
shared governance systems and structures,

and increasing data usage to support mission and values.

Distinctive Impact

This process prompts us to more directly align our brand with our mission and our values.
To reinforce this alignment,
we need to identify and define the values that we expect all members
to embrace and exude.
We also need to craft and distribute purposeful communications that reinforce this
alignment at major junctures in our evolution.
As part of these efforts,
we need to amp up our fundraising and alumni development,
building a fierce loyalty to the campus and an irresistible energy and spirit.
As donors and alumni become a more prominent part of the Cal Lutheran network,
they will be able to aid the University in becoming a partner of choice for So Cal businesses,
non-profit agencies, environmental organizations, religious institutions, and more.

Brainstorm initiatives that generate recognition for brand and mission,
increase external communication,
and deepens donors' connections to the university.

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Final Brainstorm

Think about the three themes

Student Experience
Fulfilling Work Environment
Distinctive Impact

Is there something missing?
If so, what is it?

ACTION
FOLLOWS
BELIEF

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