

Planning Session Notes 9/14/2007
STRATEGIC PLANNING AT XAVIER

WHY DO WE NEED A PLAN?

- To clarify our mission
 - *Do we all understand the mission in the same way?*
- To forge a strategy to fulfill the mission
 - *Will our plan actually be implemented? Will it affect budget?*
- To align the structure/activities of the institution with the strategy

WHAT SHOULD THE PLAN LOOK LIKE?

- Mission
 - What are our values?
- Vision
 - Where are we headed?
- Strategy: Goals (Outcomes) and Objectives (Means and Methods)
 - What are our priorities?
 - Whom do we serve? How? Why?
- Benchmarks
 - How will we know we succeeded?

PROCESS

- Who will be directly involved in the planning process?
 - *Will students be involved? Alumni?*
- How will others be genuinely engaged?
 - *Will the process be transparent?*
 - *Will senior staff and Board of Trustees respond?*
- How long should the process take?
- What would guarantee that the process is successful? What can get in the way?
 - *Planning needs to be flexible to account for what happens to New Orleans*
 - *Weak faculty governance process*

STRATEGIC PLANNING

PLANNING

- Explore
- Experiment
- Adapt
- Assess

EXPLORE

- Where are we now—Environmental Scan/Internal Assessment (SWOT Analysis)
 - What are our major strengths/weaknesses?
 - What do we need to know to figure that out?
 - What do we already know?
- Where are we headed?
 - What are our major threats/opportunities?
 - What is likeliest to change in next 5 years?
 - What would we most like to see change in next 5 years?
 - *Inevitable changes in senior administration*
- What have we learned in the process?
 - What are the critical issues the plan must address?
- What ties the parts together? What ties us together?

EXPERIMENT

- Describe Problem
- Generate Alternative Solutions
- Consider pros and cons
- Select an Alternative
- Evaluate after period of time

- Replace or Refine

STRATEGIC PLANNING

ADAPT

Strategic Plan must:

- Determine priorities
 - Choosing what we *will* do, including things we are *not* doing now
 - And, what we will *not* do, including things we *are* doing now
- Create the imperative for change
- Lead the way to value proposition for communication
- Guide decisions about:
 - Whom we hire/retain/promote
 - Where we spend scarce resources
 - What stories we tell about ourselves

Strategy is:

- Grounded in Mission/Sensitive to Market
 - *Esse est percipi*: You are what people think you are
 - Not a matter of intention but of effect
 - Not what you *say* but what your *actions* say about you
- Committed to Change
 - Mission is history and tradition you believe in enough to want to preserve
 - But also, history you are part of, tradition you need to interpret and re-interpret in the light of changing circumstances
- Centered on students
 - The why of your existence
 - Also, economic engine
- Bottom line = Top line:
 - Where the money comes from
 - Object of the enterprise
 - Alignment of purpose and resources

- Enrollment and Advancement!

STRATEGIC PLANNING

ADAPT

CRITICAL QUESTIONS

- How different?
 - Place in competitive universe that no one else occupies
 - *Historically black vs. predominately black: our mission is evolving*
- How big?
 - Ideal Size
- How good?
 - What do you mean by excellence? How good can you afford to be?
 - *Stress among faculty with respect to balance among teaching, research and service*
 - *Faculty on grants need release time for research, but there are not enough faculty to replace them*
 - *Xavier recruits at-risk students, but not enough academic support.*
 - *What is students' responsibility for their own success?*
- How diverse?
 - How narrowly should you focus?
 - *What are we doing to attract more Hispanics? Asians?*
- Famous for what?
 - What are you best at? Value most?
 - *We need to sell the Xavier "brand" to recruit and retain faculty and staff to New Orleans*
- How can you afford it?
 - Net tuition revenue
 - Fund-raising
 - Re-allocation of current expenses/ Where to spend more/less

ASSESS

- What are the promises we make?
- How do we measure success?
 - What are the measurable or observable indicators?

- How do they identify opportunities for improvement?

OUTCOME

- Answers to these questions will affect:
 - Enrollment—shaping our environment
 - Educational purpose—focusing on excellence
 - Brand—taking advantage of identity
 - Institutional learning—building community around commitment to change