The College of New Jersey

Strategic Planning Retreat

Meeting Summary: February 13-14, 2012

# Introduction

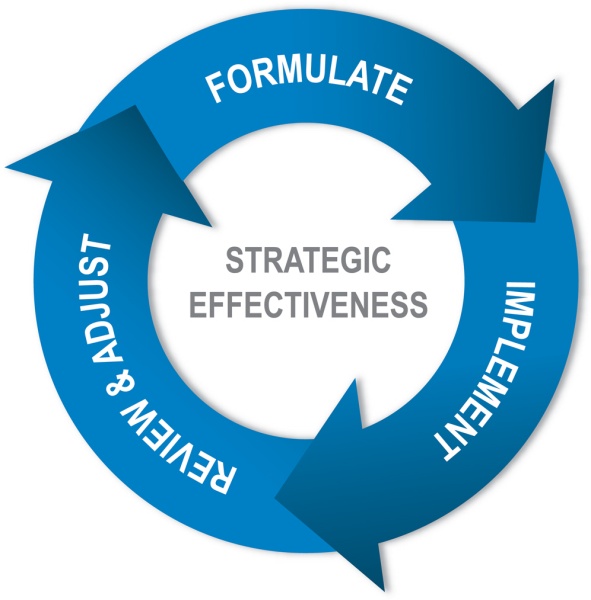
Susan Bakewell-Sachs, Co-Chair of the Strategic Planning Process and Interim Provost of The College of New Jersey (TCNJ), welcomed participants to the strategic planning session. She provided the following opening remarks:

* Thank you for your commitment to the process and to this work over the next two days.
* The engagement exemplifies how we live and work together; how we engage in shared governance.

Mort Winston, Co-Chair of the Strategic Planning Process, Professor of Philosophy and Chair of the Department of Philosophy at The College of New Jersey, also welcomed participants, reviewed the strategic planning process and work completed to date, and provided the following opening remarks.

* It’s gratifying to have the support of the campus community.
* We, in this room, have a weighty responsibility to go back to the community with something substantive.
* I’m confident that we’ll produce something strong to build on in the future.

Mort introduced Tim Fallon and Stacey Zawel of TSI Consulting Partners and invited them to facilitate the session. Tim Fallon provided an overview of strategic effectiveness—an organization’s ability to set the right goals and consistently achieve them.



Organizations with high strategic effectiveness:

* Quickly formulate a “good enough” strategic plan.
* Move immediately to implementation—letting implementation teach them the ways that the strategy is on target and ways it needs to be improved.
* Review progress on implementation regularly with honesty and candor.
* Make needed adjustments based on what is working, what isn’t, and how the world has changed.
* Focus on results, not activities.

Tim Fallon also outlined the agenda for the strategic planning session.

Tim Fallon invited Dr. R. Barbara Gitenstein, President of The College of New Jersey, to set the stage for the strategic planning session. She thanked participants for their work and made the following opening remarks.

* Higher education, especially public higher education in New Jersey, is experiencing serious challenges.
  + Fewer state and federal resources
  + The public is ever more concerned about the cost of education.
  + Family income is not increasing.
  + Higher education costs are growing at a faster rate than family income.
* However, it’s important to recognize that TCNJ has more state dollars per student than any other college institution in New Jersey, which demands that we be more attentive to outcomes. With higher invested resources it is critical to:
  + Assure we are worth the investment.
  + Achieve significantly better results.
  + Analyze student outcomes.
  + Compare ourselves to real peers.
* Careful analysis and thoughtful planning will help realign resources.
* If we can’t prove our value proposition, we won’t be able to attract new students and support from donors.
* Competition in the marketplace will increase; state support won’t. It’s critical we become more accountable and more resourceful.
  + We must get out of our comfort zone.
  + We must recognize that the same strategy is going to get the same results.
* There is more pressure on higher education than ever before to address key issues, such as:
  + Access
  + Affordability
  + Quality
  + Accountability
* In a time of increasing pressure at the federal level on higher education, it’s critical to focus our resources on those key markers for institutional success, such as:
  + Speed to degree
  + Number of graduates
  + Cost of attaining a degree
* In developing a strategic plan, it’s critical to:
  + Provide flexibility and revenue without damaging our mission.
  + Establish aspirational strategic goals.
  + Embrace constant self-reflection.
  + Commit to quality and excellence.
  + Be bold and courageous; we can’t afford to have a timid plan.

These remarks by President Gitenstein provided a basis for the strategic planning work that followed.

# Assessing the Current Situation

Assessing the current situation of The College of New Jersey is a first step in setting its future direction. As input to this assessment, between November of 2011 and January of 2012, TSI and TCNJ conducted focus groups with the following groups:

* The Executive Committee of the Board of Trustees
* Faculty Senate
* Staff Senate
* Student Government Association
* The Cabinet
* Council of Deans
* The Planning Councils
* Faculty
* Staff
* Alumni
* Community members

The focus groups addressed four core questions:

* Key strengths of the College
* The College’s weaknesses/areas of needed improvement
* Critical issues facing the College over the next three to five years
* Key priorities the College should establish in its strategic plan

Input was compiled and analyzed across participant groups and key themes were presented. Two reports, entitled *Internal Focus Groups Executive Summary* and *External Focus Groups Executive Summary* are attached to this meeting summary as Appendix A.

Tim Fallon presented the summary of TSI Consulting Partners’ analysis of the key themes from the focus groups. It may be viewed by double clicking on the link below.



Participants met in small groups to synthesize the assessment of the current situation of the College, using the focus group summary as input for their thinking. Each small group identified what members saw as the top five responses to each question. A summary of the small group reports follows.

## Strengths of the College

### Group 1: Susan Bakewell-Sachs, Tom Hagedorn, Bill Healey, Lynda Rothermel, Olaniyi Solebo

* Faculty/student engagement
* Reputation
* Supportive/welcoming
* Shared governance
* Talented, engaged faculty, students and staff

### Group 2: Brad Brewster, Curt Heuring, Kyle Magliaro, Janet Morrison, Nino Scarpati, Mort Winston

* Strong students
* Highly qualified and dedicated faculty and staff
* Campus physical environment and location
  + Strong academic programs
  + Mix of pre-professional and liberal arts
* Student-centered campus climate; focus on student development and support
* Quality and cost

### Group 3: Bill Behre, Bill Cahill, Cindy Curtis, Corey Dwyer, Angela Sgroi, Vicky Triponey

* Strength and diversity of our academic programs
* Engaged student body (right sized)
* Faculty/staff/administrative commitment to mission and goals
* Talent base for continued long-term success
* Beautiful campus

### Group 4: Josephine D’Amico, Debra Frank, Matt Golden, Magda Manetas, Brian Potter, Joe Youngblood

* Profile of students
* Value
* Classroom experience
* Liberal arts “plus” identity
* Attractiveness of campus

### Group 5: John Landreau, Jeff Osborn, Steve O’Brien, Ceil O’Callaghan, Lloyd Ricketts

* Facilities
* Distinctive learning environment
  + Undergraduate research
  + Community engaged learning
  + Student leadership development
* Academic success; retention and graduation rates
* Faculty and staff quality and commitment

## The College’s Weaknesses/Areas of Improvement

### Group 1

* Not focused on the whole student experience
* Enhance achievement of all students.
* Assessment data does not support student expectations.
* Conflict avoidance

### Group 2

* Lack of student diversity
* Lack of traditions and alumni engagement
* Weak academic advising
* Inadequate student life facilities
* Inadequate infrastructure, including IT and physical plant

### Group 3

* Lack of sufficiently articulated identity and traditions
* Limited student vision of aspirations
* Insufficient marshalling of the talent base; faculty and staff development
* Need stable, effective business model (budget, nimbleness) and facilities
* Diversity
* Ability to close assessment and decision loop

### Group 4

* Quality of physical plant, including “student experience” facilities
* Unsustainable business model
* Lack of recognition outside the state
* Institutional resistance to change
* Lack of student diversity

### Group 5

* Identity, distinctiveness, branding
* Internationalization/globalization
* Infrastructure – IT
* Facilities – specific areas of need
* Lack of sustainable business model

## Critical Issues the College Will Face in the Next Three to Five Years

### Group 1

* Broader campus engagement
* Financial sustainability
* Focus on entire student experience.
* Make best practices the standard.
* Brutal honesty in assessing issues

### Group 2

* Sustainable business model
* Maintain affordability.
* Clarify our identity and build a national reputation.
* Devote more resources to faculty and staff development.
* Improve overall student experience.
  + Student services
  + Facilities
    - Student Center
    - Fitness Center

### Group 3

* Identity
* Sustainability
  + Finances
  + Competitive facilities
  + Retention and development of faculty, staff, and administration
* Loss of focus on academic next steps
* Affordability

### Group 4

* Refined and refocused institutional mission
* Business model – sustainable and oriented to mission achievement
* Affordability
* Assessment and articulation of value added to student learning
* Investment in the “student experience”

### Group 5

* Identity – internal and external
* Sustainable business model
* Strategically oriented in our work and approach
  + Risk aversion
  + Targeting areas of distinction and excellence
  + Need to make difficult decisions
* Alumni engagement

# Setting Future Direction

Tim Fallon provided a brief overview of the key elements of an organization’s future direction.



* An organization’s mission states why it exists, its reason for being, its fundamental purpose. It’s an enduring statement that usually remains the same for many years, providing long-term continuity and direction for the organization.
* Vision articulates the long-term outcome or end-state that the organization will make a definitive contribution to creating.
* Strategy outlines what the organization needs to do at this point in its history. It is more focused and time bound than mission and vision—often looking to the next three to five years.
* An organization’s core values and/or guiding principles outline its unique approach, its norms for “how we do things” in the organization.
* An organization’s tactics outline “how to” implement its strategy.

Michael Middaugh, past Associate Provost for Institutional Effectiveness at the University of Delaware and Assessment Consultant to TCNJ, provided context for thinking about how to go from where they are to where they would like to be.

* The link between planning and assessment is critical.
* Think in terms of measuring strategic benchmarks.
* Be bold and courageous in setting metrics that will help you compete with peers as well as aspirational schools. We don’t get to where we need to be by comparing ourselves to schools we can beat.
* Don’t view diminishing state appropriations as a threat.
* Metrics will help us quantify where we need to go.
* Branding is critical to convey why TCNJ is the college of choice; to separate TCNJ from the competition.

## Mission

As context for setting future direction for the College, participants reviewed the current mission of the Department.

### Current Mission of the Department

The College of New Jersey, founded in 1855 as The New Jersey State Normal School, is primarily an undergraduate and residential college with targeted graduate programs. TCNJ’s exceptional students, teacher-scholars, staff, alumni, and board members constitute a diverse community of learners, dedicated to free inquiry and open exchange, to excellence in teaching, creativity, scholarship, and citizenship, and to the transformative power of education in a highly competitive institution. The College prepares students to excel in their chosen fields and to create, preserve and transmit knowledge, arts and wisdom. Proud of its public service mandate to educate leaders of New Jersey and the nation, the College will be a national exemplar in the education of those who seek to sustain and advance the communities in which they live.

The group agreed that the current mission provides solid guidance as to why the College exists and as such, took the mission as a “given,” using it as context to develop a vision for the College.

## Vision

Participants worked independently and then in small groups to identify common key elements of vision for the College. A summary of the small group reports follows.

### Group 1: Susan Bakewell-Sachs, Tom Hagedorn, Bill Healey, Lynda Rothermel, Olaniyi Solebo

* Transformative
  + Educational experience/not just academic
  + Whole student experience
  + An exemplar school on NSSE
* Every student has the opportunity for a distinctive student experience.
* $500M endowment
* Alumni will be thought leaders and recognized visionaries.
* Top comprehensive institution with a public mission in the nation
* Welcoming partnership with industry
* Leader on important state issues
* A DNA-embedded culture of strategic effectiveness, which includes:
  + Long-term and short-term goal setting
  + Assessment/evaluation and decision-making
  + Brutal honesty

### Group 2: Brad Brewster, Curt Heuring, Kyle Magliaro, Janet Morrison, Nino Scarpati, Mort Winston

* Primarily undergraduate institution
* National/international reputation and reach
* Deeply engaged learning and discovery; engagement is infused across the curriculum and integrated across the campus
* Educating global leaders
* Affordable for all accepted students/stable financial situation
* Leading change

### Group 3: Bill Behre, Bill Cahill, Cindy Curtis, Corey Dwyer, Angela Sgroi, Vicky Triponey

* Increase number of graduates as agents of change in national and international leadership positions.
* Universal participation and signature experiences that broadly deepen their learning and aspirational visions of themselves.
* Universal professional growth that is cycled back to the campus (faculty, staff, and alumni)
* Fiscal independence
* Willingness to embrace the non-traditional with distinction

### Group 4: Josephine D’Amico, Debra Frank, Matt Golden, Magda Manetas, Brian Potter, Joe Youngblood

* More residential
* Students, faculty, and staff concerned with world issues and active in social change.
* Experiential and service learning universally embedded in the College’s pedagogy.
* More diverse campus culture with success for all

### Group 5: John Landreau, Jeff Osborn, Steve O’Brien, Ceil O’Callaghan, Lloyd Ricketts

* Undergraduate focused institution
* Residential in nature
* Top notch facilities
* Engaged alumni
* Streamlined offerings (programs)
* Metrics for verifying students have achieved a distinctive education/experience, demonstrably achieve outcomes
* Well defined identity
* Strategic effectiveness-oriented
* Signature experiences identified
* Community and culture is aggressively hungry and creative.
* Globalization
* Student/faculty engage in a mix of signature programs.
* Diverse student body
* Improved endowment – ten times the current level
* Leading edge pedagogical techniques
* Better positioning of faculty as national and international experts

Each group’s work was further consolidated into the following list of key elements of a shared vision.

* Undergraduate focus
* Residential
* Innovative pedagogy, including:
  + Deep engagement
  + Experiential learning – broader “universal” participation; distinctive student experience
  + Service learning
* Signature programs
* Emphasis on leadership development
* Graduates making an impact
* Focus on the total student experience.
* Globalization
* Change in the culture
  + Innovation
  + Strategic effectiveness
  + Total (not brutal) honesty
* Increasing diversity
* Increasing the endowment

Discussion of the vision included the following points.

* The goal is students who care more about the world than their salaries.
* Collaborative learning and discovery is key.
* TCNJ is a social learning environment with students active in promoting social change.

## Central Challenge and Strategic Priorities

Participants were asked to identify—in a word or phrase—the central challenge that the College faces over the next three years. A summary of responses follows:

* Refine mission and make hard choices.
* Build for sustainability and strategic effectiveness.
* Co-curricular that is as strong as its academic program
* Fully integrated signature student experience
* Meeting the mission within funding constraints
* Too many tasks, too few people
* Increase endowment.
* Defining our identity
* Strengthening academic leadership at the top
* New and sustainable business plan
* Dashboard indicators that prove our value proposition
* Agreeing on and implementing a transformational strategic plan
* Developing a sustainable model which supports agreed upon identity
* Enhancing total student experience with a sustainable resource allocation model
* Forming a distinct/unique identity
* Staying competitive
* Reconciling what we want to be with that we need to be
* Clearly articulating our identity and developing a sustainable plan to implement it
* Sustainable business model that supports the mission
* Deciding unequivocally what thing we are going to be good at
* Money
* Define and strategically pursue our unique and focused mission.
* Remaining competitive among peer institutions with limited resources
* Aggregate our emergent identity.
* Develop an ambitious signature academic direction.
* Distinguishing our identity and staying with it
* Sustainable business model and revised mission and identity
* Need to define institutional identity that will guide everything that we do
* Need to make tough decisions in a transparent fashion around resource allocation
* Effective enrollment management

Using a one-page graphic representation of a strategic map, Stacey Zawel explained the concepts of central challenge and strategic priorities.

* The oval at the top of the strategic map is the central challenge.
  + It is the focal point for strategy.
  + It focuses on what the organization needs to do in the next three years to support its mission.
* The central challenge is supported by some number of strategic priorities.
  + Strategic priorities are the few critical things we must do in order to meet our central challenge.
  + The number of strategic priorities can vary, but is never fewer than three or more than six.
* There are two tests of a strategic priority:
  + Is each priority *necessary* to meet the central challenge?
  + Are the strategic priorities taken together *sufficient* to meet the challenge?

Based on participant input on the central challenge, Stacey Zawel then presented a “first draft” of a possible central challenge and strategic priorities for the College for the next three years. After discussion and revision, the group agreed to the following version as “good enough” to begin work to develop strategic objectives for the map.



Discussion of the central challenge and strategic priorities included the following points.

* A few participants noted concern that the categories seem to encompass everything and wonder where prioritization fits.
* There was significant discussion about the use of “distinctive”, “transformative”, and/or “deeply engaged” in the central challenge.
  + Some viewed “distinctive” as meaning different.
  + Others preferred that the central challenge reflect “what we do” such as:
    - Transforming students
    - Providing deeply engaged educational experiences
  + Some preferred “transformative” in the central challenge to appropriately reflect:
    - The College’s unique signature, integrated experiences that can change a person’s identity.
    - Students leave a different person than when they arrive.
    - How important it is to help students build long-term aspirations.
    - The importance of keeping these transformative experiences into the future
* Participants agreed that the above concepts were captured in the central challenge language: “deeply engaged educational experience.” The full meaning of this phrase is elaborated in the strategic priorities that support the central challenge.
* “Affordable” is a key element in the central challenge – ensuring TCNJ is accessible for students and their families.
* “Sustainable” is also critical, ensuring TCNJ is able to continue to provide an outstanding education in the face of increasing financial challenges.
* While all participants acknowledged that providing a strong academic program is the core deliverable, all agreed that focus on the total student experience is also critical as stated in Strategic Priority C, “Provide an integrated, transformative total student experience.”
* Strategic Priority A, “Clarify and communicate TCNJ identity and distinctiveness,” emphasizes the need for TCNJ to:
  + Increase its self-understanding of its identity and what makes it unique.
  + More effectively communicate that identity and distinctiveness to key stakeholders – including students, prospective students and parents.
* Strategic Priority B, “Strengthen TCNJ intellectual culture and academic programs,” includes efforts to support and strengthen the teacher-scholar model and TCNJ signature academic experiences.
* In Strategic Priority C, the total student experience begins with student recruitment and continues through the educational experience and the entire the life of an alum.
* Strategic Priorities D, “Develop and implement a sustainable financial model,” and E, “Create a strategically effective organization,” include an emphasis on resource reallocation.
* Strategic Priority E also includes the need to create a culture of strategic effectiveness.
* The Cross-cutting Strategic Priority, “Create a culture of accountability to drive excellence by focusing on outcomes and metrics,” is critical to the College’s focus on assessment and accountability.
* In strategic map logic, a cross-cutting strategic priority:
  + Is placed at the bottom of the strategic map to show that it is foundational to the strategy
  + Spans the map from left to right to demonstrate that efforts to achieve the cross-cutting priority will be embedded in the efforts to implement all the other strategic priorities on the map.
  + No plan to implement the other strategic priorities will be considered complete unless it includes emphasis on the cross-cutting priority.

## Strategic Mapping

In order to develop a strategic map for the College, participants worked in small groups to identify objectives that support each strategic priority. A summary of the small group reports follows:

### Strategic Priority A: Clarify and Communicate TCNJ Identity and Distinctiveness (Mort Winston, Matt Golden, Bill Cahill, Kyle Magliaro, Angela Sgroi, Tom Hagedorn)

* Establish the specific purpose of a TCNJ education.
* Identify essential student experiences.
* Identify points of excellence and distinctiveness.
* Identify long-term goals for graduates.
* Reach consensus on a concise institutional brand.

### Strategic Priority B: Strengthen TCNJ Intellectual Culture and Academic Programs (Corey Dwyer, Janet Morrison, John Landreau, Magda Manetas, Cindy Curtis)

* Identify and prioritize signature experiences and work towards universal participation.
* Expand support for faculty scholarship and faculty-student scholarship.
* Faculty and staff development; especially to foster engaging pedagogies and best practices in student life
* Advising to foster student intellectual growth

### Strategic Priority C: Provide an Integrated, Transformative Total Student Experience (Olaniyi Solebo, Katherine Miklosz DeSieno, Vicky Triponey, Lynda Rothermel, Ceil O’Callaghan, Brian Potter)

* Develop and implement a process for ensuring all students participate in multiple, integrated, experiential learning opportunities.
  + Internships
  + Global programming
* Review and enhance “entry point” opportunities for the integration of out-of-class and in-class experiences.
* Create/modernize physical spaces and amenities for co-curricular activities that are equal to those in the academic environment and allow for student interaction.
* Develop and implement an assessment process for the total student experience.
  + Outcome
  + Satisfaction

### Strategic Priority D: Develop and Implement a Sustainable Financial Model (Lloyd Ricketts, Joe Youngblood, Bill Behre, Steve O’Brien, Bill Healey)

* Explore creative pricing structures.
  + Differential tuition
  + Residential
* Assumptions about level of state aid
* Target fundraising for targeted strategic goals.
* Out-of-state students
* Non-traditional programs/pedagogies
* Build model: class size ↔ adjunct model
* Novel academic calendar
* Explore MOA 62: allow non-research faculty to teach more.

### Strategic Priority E: Create a Strategically Effective Organization (Curt Heuring, Debra Frank, Susan Bakewell-Sachs, Jeff Osborn, Nino Scarpati)

* Create an organizational infrastructure and culture that supports and promotes strategic/institutional effectiveness.
* Align all institutional planning efforts and processes.
* Create the physical and technological infrastructure that supports and promotes strategic and institutional effectiveness.
* Faculty and staff development

Based on the above input and extensive discussion that followed, the group developed the strategic map on the following page to guide the College during the next three years.



Discussion of the strategic map included the following points.

* The central challenge, “Make the choices necessary to provide educational excellence on an affordable, sustainable basis,” reflects that difficult choices are going to need to be made in the context of:
  + Striving for excellence
  + Maintaining affordability
  + Achieving long-term sustainability
* Objective A-1, “Reaffirm the TCNJ mission and key educational elements/outcomes,” is important because the mission provides long-term guidance and context for strategic planning.
  + Some want to narrow/focus the mission.
  + A few noted that the strategic planning process may result in a need to modify the mission.
  + Others voiced concern that revising the mission could slow progress.
* Objective A-2, “Define key outcomes for TCNJ graduates:”
  + Refers to using outcomes in assessment
  + Requires agreement on the few key purposes all programs must support
  + Includes identifying and raising the aspirations of TCNJ graduates
    - A few prefer these aspirations be specific, such as TCNJ graduates will have:
      * Leading roles in national and international government
      * National level positions
    - Some prefer more general aspirations, such as:
      * Prepare students to take on whatever challenges they choose.
      * Embolden new leaders to go out and change the world.
      * Help students see all they can be.
    - It was noted that these general aspirations are consistent with TCNJ’s Viewbook, which states “TCNJ creates tomorrow’s leaders.”
* Objective A-3, “Identify points of excellence and distinctiveness,” includes developing specific goals that complement the College’s mission yet provide more specific guidance.
* Objective A-4, “Define a concise institutional identity,” means clearly defining how we talk about ourselves, which will help us:
  + Align around goals and identity.
  + Sell TCNJ to students.
  + Sell our graduates to graduate schools.
* In Objective A-4, it will be important that the TCNJ identity:
  + Reflect self-understanding.
  + Capture the essence of TCNJ for any audience.
  + Help create clarity about the role of education at TCNJ.
  + Reflect the broader purpose of the College as a leader in the state.
* In the context of discussing identity, some used the term “brand.”
  + Some shared concern that the use of a TCNJ “brand” would be viewed as marketing.
  + Many see “brand” as different from identity, viewing it as less core to what TCNJ is.
* In developing an institutional identity, a suggested first step included reviewing the results of work recently completed by an outside marketing firm.
* Objective A-5, “Implement effective communication strategies for key target audiences,” recognizes that a marketing effort for admissions is currently underway.
  + The first phase needs to be planned in order to move the marketing plan forward.
  + Potential internal and external target audiences include:
    - Prospective students and their parents
    - Potential donors
    - Graduate schools
    - Alumni
    - The public
* In Strategic Priority B, “Strengthen TCNJ intellectual community and focus academic programs,” “community” is intended to reflect the College’s emphasis on supporting the faculty teacher-scholar model and emphasis on signature programs and distinctive pedagogy.
* Objective B-1, “Increase support for TCNJ faculty scholarship,” refers to being academically ambitious.
  + Though the focus is faculty, the intent is to impact the entire learning community; scholarship is a communal effort at TCNJ.
  + Scholarship is central to everything − including student outcomes − which is dependent on:
    - Teaching
    - Learning
    - Scholarship
  + The goal in Objective B-1 is to:
    - Support scholarship as a central element in the educational mission of the College.
    - Continue to support the teacher-scholar model – one of the significant ways that TCNJ’s is unique.
    - Support teacher-scholars to:
      * Publish
      * Seek grants.
      * Conduct research.
    - Aim for national experts in academic areas.
    - Set and strive for the academic level desired among all faculty.
* Accomplishing Objective B-2, “Use program assessment to define and drive excellence” will:
  + Help the College build and maintain strong academic programs.
  + Incentivize the community to be aggressive and ambitious.
  + Require defining:
    - Success criteria and assessment methods
    - The College’s academic ambition
  + Include determining what programs to strengthen, maintain, or discontinue.
* As context for making decisions that drive excellence, Robert Dickeson’s book, “Prioritizing Academic Programs and Services: Reallocating Resources to Achieve Strategic Balance,” may be helpful. It suggests asking three critical questions.
  + What are we doing well?
  + What are things we are doing that with a modest infusion of resources could be done well?
  + What are those things we are not doing well that we need to reduce or eliminate?
* Resource reallocation will be required to accomplish Objective B-2.
  + Some referred to President Gitenstein’s request for the strategic planning team to “be bold and courageous,” interpreting it to include making these tough reallocation choices.
  + Securing agreement on criteria will pave the way for development of a framework to strategically reallocate resources.
* The aim of the signature experiences referred to in Objective B/C-3, “Identify and prioritize signature experiences and foster universal participation,” includes:
  + Achieving sustained engagement; immersion.
  + Providing experiential learning opportunities.
  + Blending curricular and co-curricular experiences.
* “Signature experiences” in Objective B/C-3, refers to:
  + Experiential learning opportunities
  + Study abroad programs
  + First Year Experience
  + Other important, meaningful experiences
* Many participants agreed that these signature experiences are a TCNJ distinctive and make the education unique by providing a combination of:
  + - Scholarly learning
    - Leadership skill building
    - Social and global consciousness raising outside the classroom
* All participants agreed that the signature experiences need to remain tied to the curriculum and always engage faculty.
  + - Faculty needs a voice to make sure they are meaningful.
    - The value of these experiences must be maintained.
* Participants also agreed that students need to participate in at least two signature experiences during their tenure at the College.
* There was consensus among the group on the importance of faculty/student scholarship. This is included in Objective B/C-3 and Objective B/C-4, “Foster engaged pedagogies and best practices wherever learning occurs.”
* The aim of Objective B/C-4 is to help achieve a consistent level of academic rigor across all programs.
  + An important component of this objective is faculty/student scholarship.
  + The objective also encompasses staff involved in educating students.
* There was significant discussion about whether Objectives B/C - 5, “Strengthen advising to foster student learning and success,” should span Strategic Priorities B and C.
  + Some suggested that the strategic plan would be better served if academic programs were distinguished from student experiences.
  + It was also noted that the current governance process would require approval from multiple governance groups − one for academics and one for student experiences.
  + At the same time, it was agreed that the governance process needs to transform to accommodate integration of academics and student affairs.
  + In the end, all agreed that spanning both columns fosters integration of academics and student affairs – an important aim of the College.
* In Strategic Priority C, “Strengthen the integrated, transformative total student experience,” “total” refers to integrating all aspects of student life at TCNJ for a complete experience.
* Objective C-2, “Implement an assessment process for the total student experience,” includes the need to establish and measure outcomes for signature experiences.
* Objective C-6, “Create/modernize facilities for co-curricular student engagement,” reflects the need to upgrade the quality of co-curricular facilities.
  + Prospective students and their parents notice the sharp contrast between the quality of the academic and student facilities.
  + The condition of co-curricular facilities suggests that student life has been left behind.
  + A lack of adequate and modernized student life space is negatively impacting the total student experience and could result in a loss of students.
  + Reuse of existing space holds significant opportunity for new student life space.
  + Though physical infrastructure is also included in Objective E-4, participants agreed that redundancy for emphasis is important.
* Objective D-1, “Build financial models to support strategic resource deployment,” emphasizes the development of several financial models based on a different series of assumptions. These include:
  + Declining state resources
    - Some prefer this explicitly stated on the strategic map.
    - Others strongly disagreed and believe financial sustainability should not drive the conversation.
  + A tuition-driven College
* Some noted the importance of being bold in making strategic resource deployment decisions as part of Objective D-1, recognizing that much can be achieved and lead to a meaningful end.
* Objective D-2, “Implement reallocation to support strategic priorities,” is critical because:
  + It’s importance to cut back in weak areas to support areas of strength.
  + It’s critical to be bold and courageous.
* Objective D-3, “Explore creative options for revenue enhancement,” is an opportunity to think nimbly in order to provide funds to do what’s really important.
  + A creative approach will require the College’s willingness to explore non-traditional pedagogy and students.
  + Revenue enhancement opportunities may not need to be held to the same standard as TCNJ traditional academic programs.
  + All the options don’t necessarily have to “fit” the TCNJ mold.
  + They also don’t need to be so close to the TCNJ mission. They could, for example, include adult learning.
  + Many participants agreed that governance will need to be modified; the current TCNJ governance process is not set up to embrace this approach.
* It was noted that redistributing human resources – as referred to in Objective D-5, “Ensure adequate human resources aligned with priorities” – must be done in the context of a unionized campus.
* Strategic Priority E, “Create a strategically effective institution,” reflects the need for a culture shift in a number of different areas, including:
  + Governance processes
  + Organizational structure
  + Technology infrastructure
  + Physical infrastructure
* Objective E-1, “Align decision making with strategic/institutional effectiveness,” is intended to be broad and refers to reviewing decision-making hierarchy throughout the entire institution.
* In the process of developing the strategic map, participants had varying degrees of willingness to embrace change.
  + A few see everything as fine and view change as non-urgent.
  + Most agreed that some level of change is needed and the time is right.
  + Others believe transformation is necessary to survive and change is urgent.
* Cross-cutting Strategic Priority F, “Create a culture of accountability focused on outcomes and metrics,” is important and focuses the organization on ensuring that implementation is carried out in the context of assessment and improved performance.

# Implementation Planning

## Setting Implementation Priorities

The group prioritized the efforts to implement the strategic map in a two-phase process during the next 12 months. Phase 1 implementation will provide the foundation for the core work that the College needs to carry out in Phase 2.

Two prioritization exercises were used to survey each person’s thinking on the allocation of the organization’s time and energy that should be devoted to each column of the strategic map during Phase 1 of implementation. (100 points represents all the resources that will be spent on implementation.) A summary of each person’s input follows.

# Phase 1 Prioritization

| **A** | **B** | **C** | **D** | **E** |
| --- | --- | --- | --- | --- |
| 20 | 10 | 10 | 20 | 40 |
| 15 | 15 | 30 | 30 | 10 |
| 10 | 30 | 30 | 20 | 10 |
| 12.5 | 25 | 25 | 25 | 12.5 |
| 30 | 10 | 10 | 20 | 30 |
| 30 | 15 | 15 | 20 | 20 |
| 20 | 10 | 10 | 40 | 20 |
| 15 | 15 | 30 | 30 | 10 |
| 10 | 25 | 35 | 10 | 20 |
| 15 | 15 | 20 | 25 | 25 |
| 20 | 10 | 30 | 30 | 10 |
| 25 | 15 | 15 | 30 | 15 |
| 30 | 10 | 10 | 20 | 30 |
| 5 | 15 | 30 | 20 | 30 |
| 30 | 10 | 10 | 30 | 20 |
| 15 | 15 | 15 | 35 | 20 |
| 20 | 20 | 10 | 40 | 10 |
| 30 | 10 | 10 | 30 | 20 |
| 25 | 20 | 20 | 25 | 10 |
| 25 | 15 | 15 | 20 | 25 |
| 40 | 10 | 10 | 20 | 20 |
| 25 | 25 | 10 | 25 | 15 |
| 10 | 20 | 20 | 30 | 20 |
| 20 | 0 | 0 | 20 | 60 |
| 5 | 0 | 0 | 70 | 25 |
| 10 | 30 | 30 | 10 | 20 |
| 20 | 30 | 10 | 30 | 10 |
| 20 | 25 | 20 | 25 | 10 |
|  |  |  |  |  |
| **552.5** | **450** | **480** | **750** | **567.5** |

Next, the group surveyed perceptions of which objectives on the map are the most important to emphasize during Phase 1. Each person was given five votes, and a summary of the “straw vote” is depicted in the table below.

|  | **A** | **B** | **C** | **D** | **E** |
| --- | --- | --- | --- | --- | --- |
| **1** | 13 | 5 | 1 | 15 | 11 |
| **2** | 8 | 6 | 1 | 20 | 17 |
| **3** | 3 | 7 | | 11 | 2 |
| **4** | 15 | 4 | | 2 | 0 |
| **5** | 2 | 5 | | 4 | 5 |
| **6** | X | X | 5 | X | 1 |

These “straw polls” will provide guidance on the most important things for the College to focus on as it proceeds with implementation planning in Phase 1.

## Identifying Tracks of Work

Tim Fallon introduced the group to the concept of a “track of work.”

* A track of work is a single map objective or a group of related objectives that use the same resources.
* Tracks of work are a means of getting organized for implementation.
* Organizations generally focus on no more than three to five tracks in a 12-month implementation period.

Participants agreed that the following tracks of work should receive primary emphasis during Phase 1 of implementation.

### Models and Reallocation

* Objective D-1: Build financial models to support strategic resource deployment.
* Objective D-2: Implement reallocation to support strategic priorities.

### Strategic Decisions and Processes

* Objective E-1: Align decision making with strategic/institutional effectiveness.
* Objective E-2: Align institutional planning, assessment and budgeting processes.

### Define Distinctive Identity

* Objective A-1: Reaffirm the TCNJ mission and key educational elements/outcomes.
* Objective A-4: Define a concise institutional identity.

### Revenue Enhancement

* Objective D-3: Explore creative options for revenue enhancement.

### Excellence/Signature Programs

* Objective A-3: Identify points of excellence and distinctiveness.
* Objective B-2: Use program assessment to define and drive excellence.
* Objective B/C-3: Identify and prioritize signature experiences and foster universal participation.

A second prioritization exercise was conducted in order to poll participants on the implementation priorities for Phase 2 of implementation – after some of the foundational work is complete.

A summary of each person’s input follows.

# Phase 2 Prioritization

| **A** | **B** | **C** | **D** | **E** |
| --- | --- | --- | --- | --- |
| 15 | 20 | 20 | 20 | 25 |
| 15 | 10 | 40 | 20 | 15 |
| 25 | 15 | 30 | 15 | 15 |
| 10 | 25 | 45 | 10 | 10 |
| 10 | 30 | 30 | 10 | 20 |
| 10 | 25 | 35 | 20 | 20 |
| 10 | 30 | 30 | 15 | 15 |
| 10 | 25 | 25 | 20 | 20 |
| 10 | 20 | 20 | 25 | 25 |
| 5 | 30 | 30 | 15 | 20 |
| 10 | 30 | 30 | 15 | 15 |
| 20 | 10 | 10 | 30 | 30 |
| 10 | 30 | 30 | 15 | 15 |
| 10 | 30 | 20 | 20 | 20 |
| 10 | 30 | 25 | 25 | 10 |
| 15 | 20 | 20 | 30 | 15 |
| 15 | 40 | 25 | 10 | 10 |
| 10 | 35 | 35 | 10 | 10 |
| 5 | 30 | 25 | 25 | 15 |
| 10 | 30 | 30 | 15 | 15 |
| 10 | 30 | 30 | 15 | 15 |
| 20 | 20 | 20 | 20 | 20 |
| 10 | 30 | 20 | 20 | 20 |
| 10 | 25 | 15 | 30 | 20 |
| 10 | 25 | 25 | 20 | 20 |
| 5 | 20 | 40 | 5 | 30 |
| 10 | 25 | 25 | 20 | 20 |
|  |  |  |  |  |
| **310** | **690** | **730** | **495** | **485** |

|  | **A** | **B** | **C** | **D** | **E** |
| --- | --- | --- | --- | --- | --- |
| **1** | 0 | 8 | 2 | 0 | 0 |
| **2** | 8 | 9 | 7 | 14 | 0 |
| **3** | 2 | 7 | | 3 | 9 |
| **4** | 0 | 9 | | 11 | 4 |
| **5** | 10 | 11 | | 6 | 12 |
| **6** | X | X | 9 | X | 7 |

Participants agreed that the following tracks of work should receive primary emphasis during Phase 2 of implementation.

### Setting the Bar for Excellence

* Objective A-2: Define key outcomes for TCNJ graduates.
* Objective B-1: Increase support for TCNJ faculty scholarship.
* Objective B-2: Use program assessment to define and drive excellence.
* Objective B/C-3: Identify and prioritize signature experiences and foster universal participation.
* Objective B/C-4: Foster engaged pedagogies and best practices wherever learning occurs.
* Objective B/C-5: Strengthen advising to foster student learning and success.

### Faculty Scholarship and Staff Development

* Objective B-1: Increase support for TCNJ faculty scholarship.
* Objective E-6: Expand and strengthen faculty and staff development.

### Resourcing Excellence

* Objective B-2: Use program assessment to define and drive excellence.
* Objective C-2: Implement an assessment process for the total student experience.
* Objective C-6: Create/modernize facilities for co-curricular student engagement.
* Objective D-2: Implement reallocation to support strategic priorities.
* Objective D-4: Expand and strengthen development efforts aligned with priorities.
* Objective E-5: Implement technology to support effectiveness.

### Communicating Distinctiveness

* Objective A-5: Implement effective communication strategies for key target audiences.

### Culture of Innovation

* Objective E-3: Create a culture of innovation and strategic/institutional effectiveness.

Discussion of the tracks of work included the following points.

* Phase 1 is a period of preparation and tool building.
  + Developing reliable data to make reliable decisions is a clear priority.
  + Establishing a data system people can trust is critical.
  + Objectives B-2 and B/C-3 will help drive resource allocation in Phase 1.
* In Phase 2, Strategic Priorities B and C, academic programs and student experience, respectively, will be the focus.

# Next Steps

At the conclusion of the meeting, the group identified the following next steps.

TSI will provide the following documents to Susan Bakewell-Sachs for distribution to session participants.

* A final version of the strategic map developed during the strategy session immediately following the session
* A “presentation” version of the strategic map by February 17
* A protocol for the communications session outlined below by February 17
* A comprehensive meeting summary of the strategic planning session by March 6, 2012

## Communicating the Strategic Plan

A key aspect of the strategic planning process is communicating the draft strategic plan to key constituents and securing their feedback on it. The group identified the following stakeholders with whom the plan will be communicated.

### Internal Stakeholders

* Dr. Barbara Gitenstein, TCNJ President
* The Committee on Planning and Priorities
* The Cabinet
* The Planning Council
* The Board of Trustees
* Faculty and Staff Senates
* Faculty and staff
* Senior leadership teams
* Student Government Association
* Additional open communications sessions will be held to make sure everyone has an opportunity to learn about the draft strategic plan and provide feedback.
* The communications sessions will include:
  + A presentation of the draft strategic plan by members of the planning group – including the mission, strategic map, and 12-month implementation priorities
  + Allowing time for clarifying questions to ensure understanding
  + A structured opportunity to secure feedback from participants, based on questions similar to the following:
    - What are the strengths of the strategic plan?
    - What issues/concerns do you have?
    - What suggestions do you have to ensure the success of plan implementation?
  + These meetings will use the following documents provided by TSI:
    - The presentation version of the strategic map
    - The protocol of the communications session
* Leadership will revise the strategic map as appropriate based on the input received.

### External Stakeholders

* Unions
* Alumni

## Implementation Planning

Participants agreed to the following next steps regarding implementation planning.

* Implementation planning will need to be coordinated with:
  + Efforts to develop metrics for institutional assessment/effectiveness
  + Work on the facilities master plan
* Leads/champions need to be identified for each Phase 1 track of work. They will be responsible for:
  + Completing the preliminary implementation plan for their assigned track of work − using today’s draft map as input
  + Ensuring the preliminary implementation plans are completed and submitted for review
* Susan Bakewell-Sachs and Mort Winston will lead a coordination meeting to:
  + Compare work across the tracks in order to identify resource requirements and what’s realistic to accomplish in Phase 1.
  + Resource implementation (time, money, personnel, and “what comes off the plate, etc.).
  + Identify those who will do the work of implementation.
* The implementation teams will continue to improve the implementation plans as necessary/appropriate as they carry out the work.

## “Review and Adjust” Process

Tim Fallon outlined the following as possible elements of a review and adjust process for the College.

* Using regular leadership meetings for:
  + Implementation updates
  + Resolution of implementation issues/problems
* Conducting periodic Review and Adjust Sessions
  + Two or three times each year
  + More detailed review of progress with implementation of each track of work, including:
    - Accomplishments
    - Issues/problems/gaps
    - Lessons learned
    - Next steps
  + Review and adjust the strategic map and implementation plans as needed.
* Conducting an Annual Strategy Update
  + This is typically a one-day session
  + It reviews progress on implementation (one of the Periodic Review and Adjust Sessions).
    - Identify accomplishments.
    - Resolve any implementation issues.
  + Update the strategic map based on:
    - What was learned from implementation
    - What’s working and what isn’t
    - How the environment has changed
  + Set implementation priorities for the next 12 months.
  + Align budget and human resources.