

# 2024

Meet the Moment

AGB National Conference on Trusteeship

## Pre-Conference Workshops

Tuesday, March 26<sup>th</sup> 2024 | 1:30 – 4:30 PM EST

**Paul Friga** | AGB Practice Area Leader in Strategy Development

**JuliAnn Mazachek** | President, Washburn University

**John Dietrick, JD** | Vice Chair, Washburn University Board of Regents

**Sister Christine De Vinne** | President, Ursuline College



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# Meet Your Panelists



**Paul Friga, PhD**

AGB Senior Consultant,  
Practice Area Leader – Strategy  
& MAP

Former Trustee – Saint Francis  
University; Former Board Chair at  
St. Francis & Claire Church

Professor of Strategy &  
Consulting at UNC CH

Former Consultant with McKinsey  
and PwC



**JuliAnn Mazachek, PhD**

President, Washburn University

Served as Vice President for  
Academic Affairs and CAO at  
Washburn from 2016 to 2022

Previous President and CEO of  
the Washburn University Alumni  
Association and Foundation



**John Dietrick, JD**

Vice Chair, Washburn University  
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Appointee

Principal at The Law Offices of  
John R. Dietrick, P.A.

JD from Washburn University  
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**Sr. Christine De Vinne,  
OSU, PhD**

President, Ursuline College

Previously a Dean at Ursuline  
College

Served as Vice President for  
Academic Affairs at Notre Dame  
of Maryland University

Previous President of the  
American Name Society

# Today's Agenda

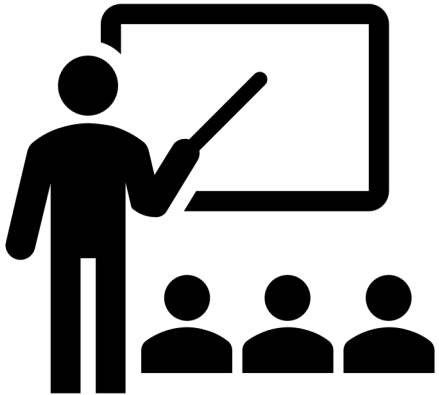


**1.** What is Strategy

**2.** How to do Strategy

**3.** Tips for Moving Forward

# Today's Agenda



**1. What is Strategy**

2. How to do Strategy

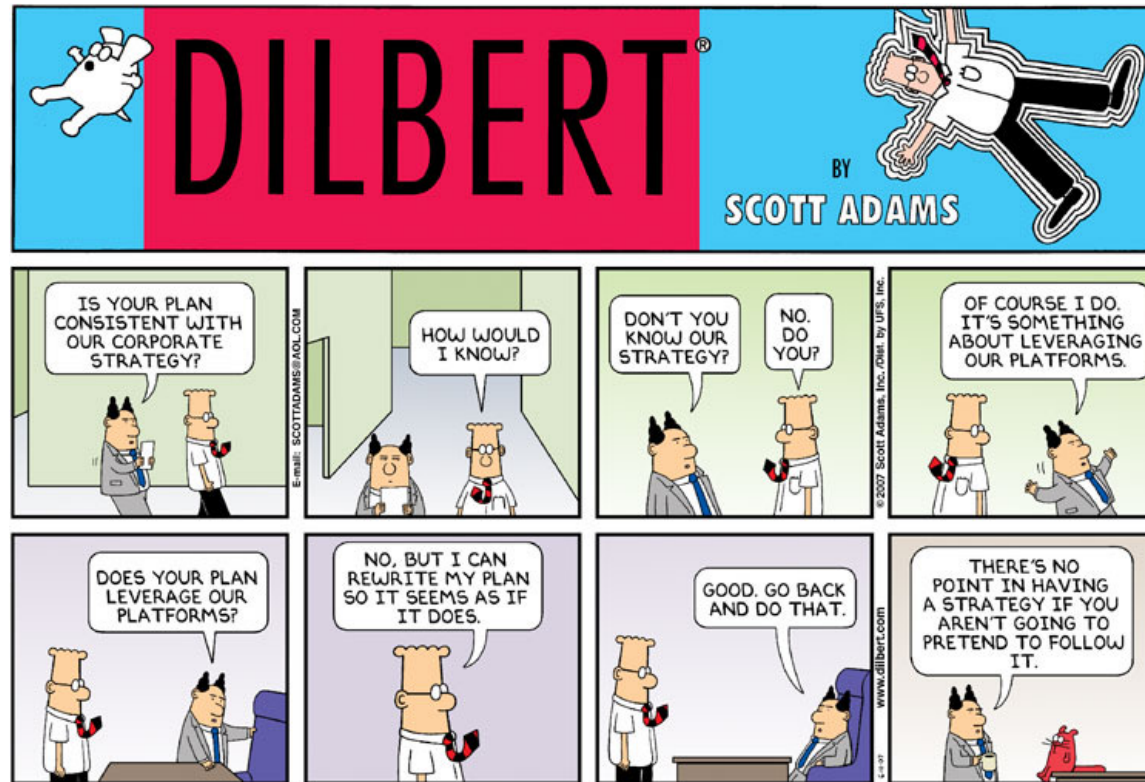
3. Tips for Moving Forward

# What is Strategy?

## Strategy

**Noun.**

*An elaborate  
and systematic  
plan  
of action.*

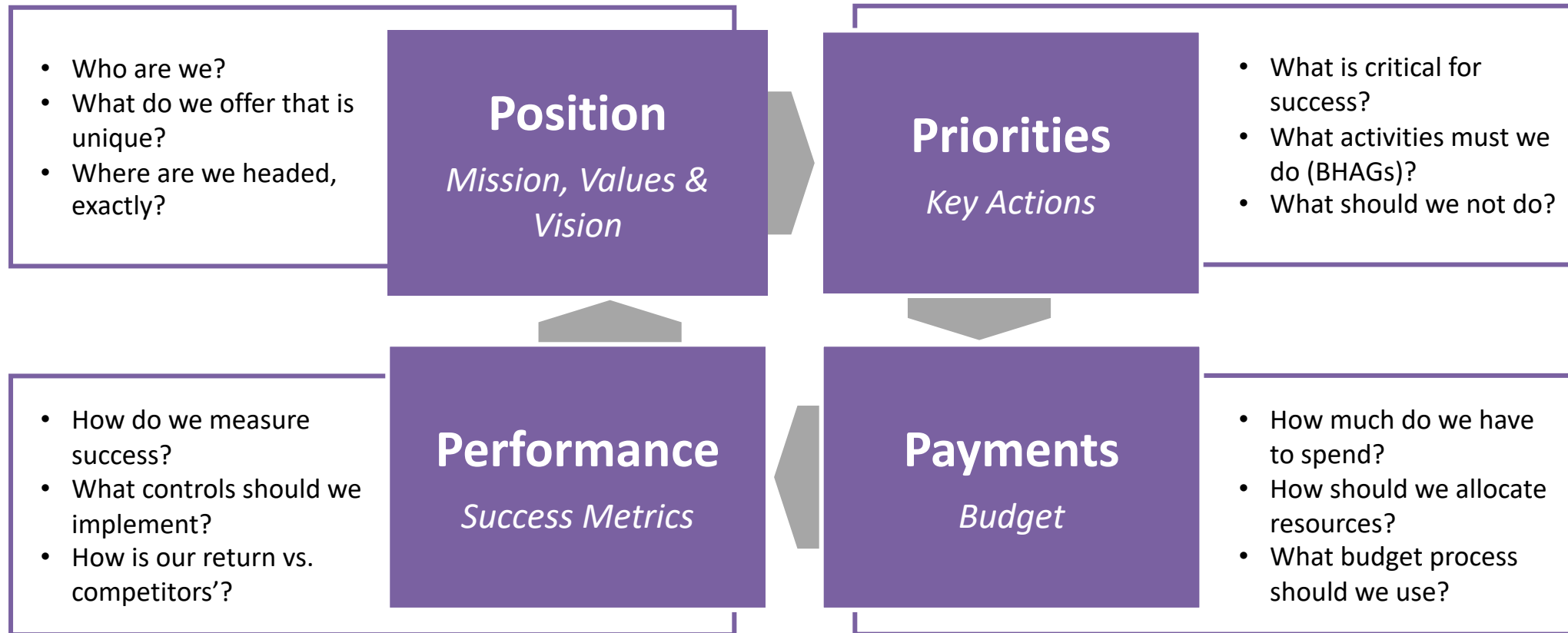


# Key Questions for Evaluating Strategy

- 1. *Is it concise, clear and communicated?***
- 2. *Is it aligned with higher level strategies?***
- 3. *Does it address the 4 Ps?***
  - Positioning (mission, values, and vision)
  - Priorities (no more than 3 for an overall unit)
  - Payments (resource allocations)
  - Performance (clear metrics)

*Does it guide daily  
decision making?*

# The Content of Strategy – Paul's 4 P's



# Strategy Statements in The Strategic Action Process

## Mission Statement

Statement which specifies an institution's purpose or "reason for being" and the primary objective toward which the institution's programs & plans should be aimed. Statement specifying the institution's key constituents and how the institution will serve them. It must be clear and understood.  
*It "makes you proud."*

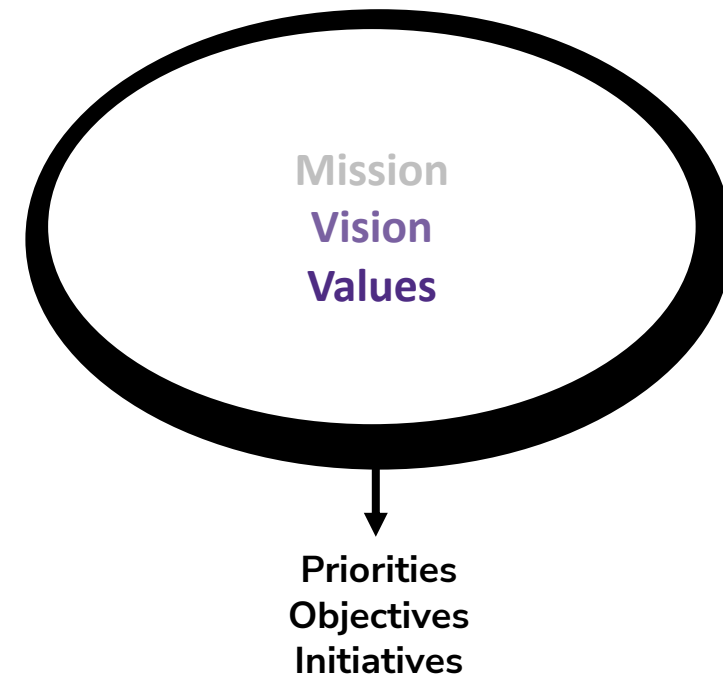
## Vision Statement

Statement describing what the institution strives to be at some future time. It should be specific and motivating.  
*It "makes you excited."*

## Values

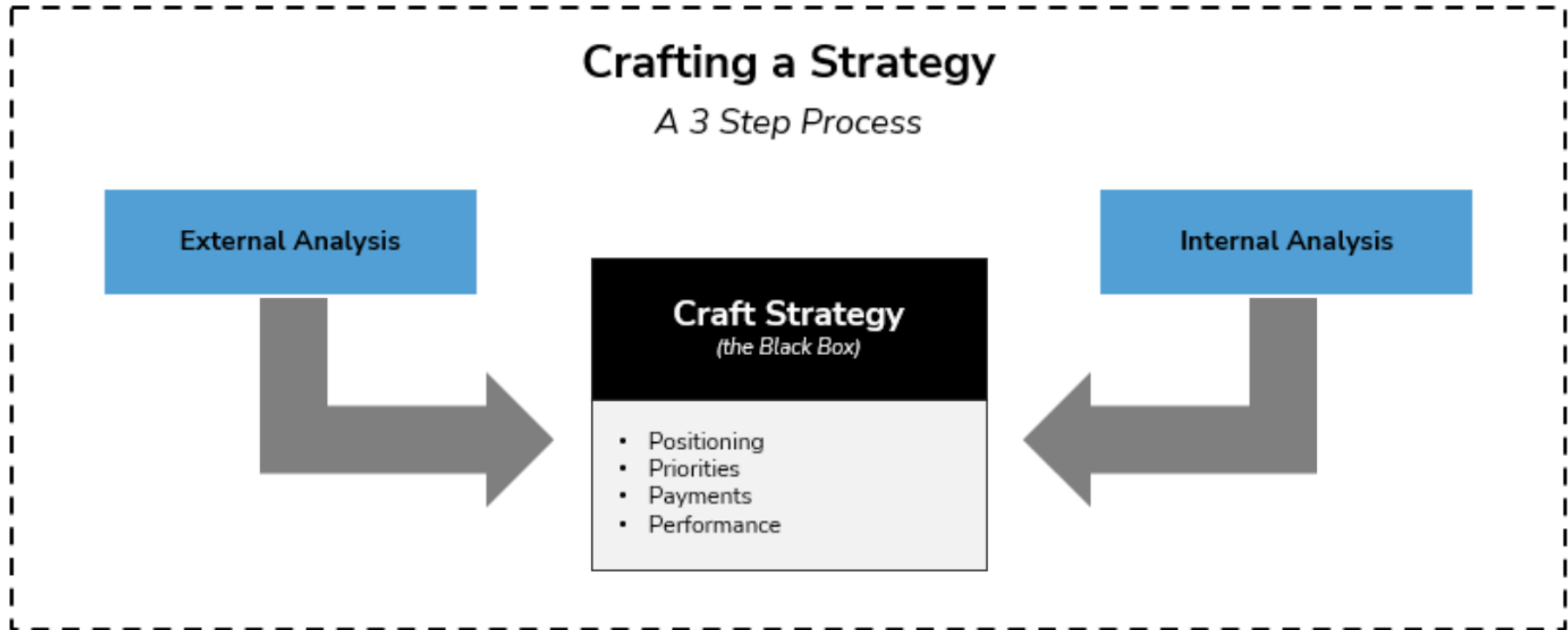
It is what we believe in, our guiding principles, and how we interact.  
*It "makes you belong."*

## The T-Shirt Theory (Strategy on one page)

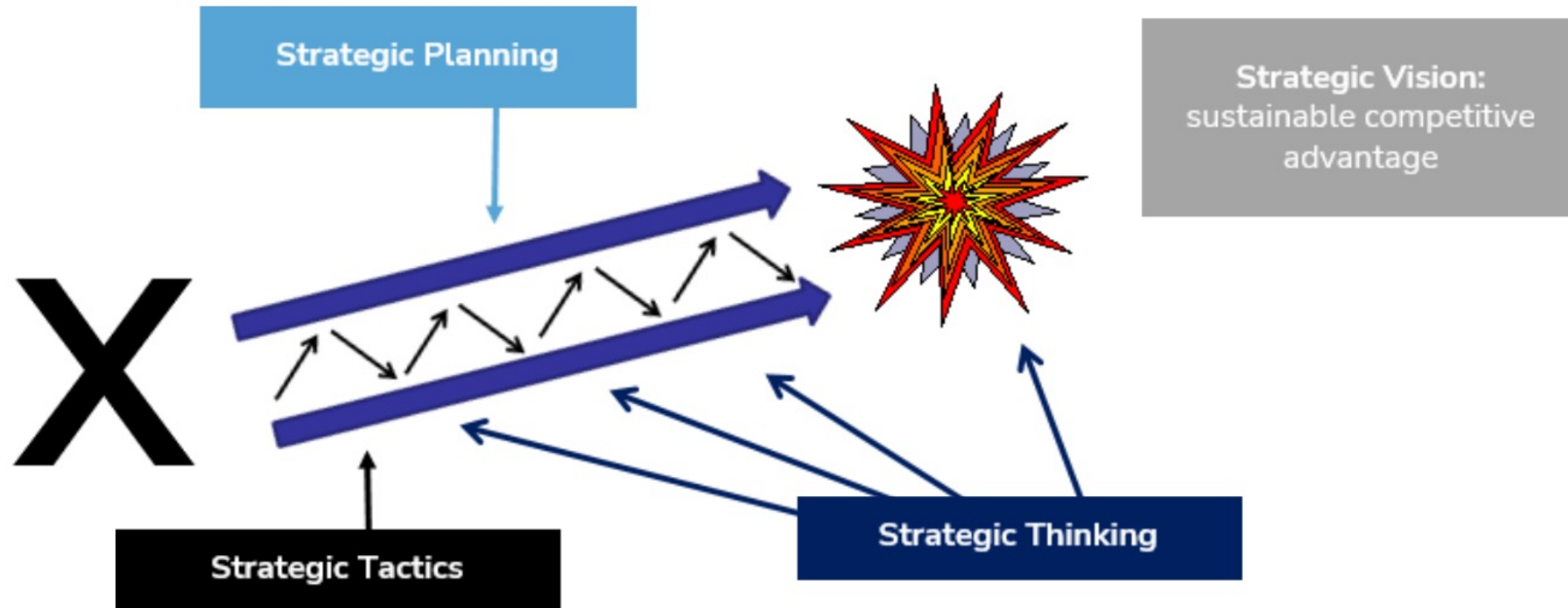




# How do Institutions Create Strategies?



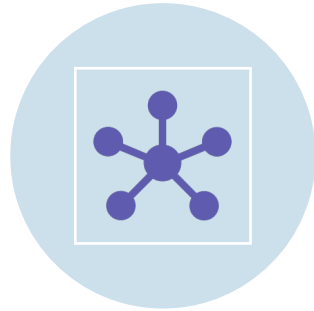
# There Are Different Tools in The Strategy Process



# Forces Impacting Higher Education



Changing student needs  
and expectations



Shifting public perception  
of the value of college



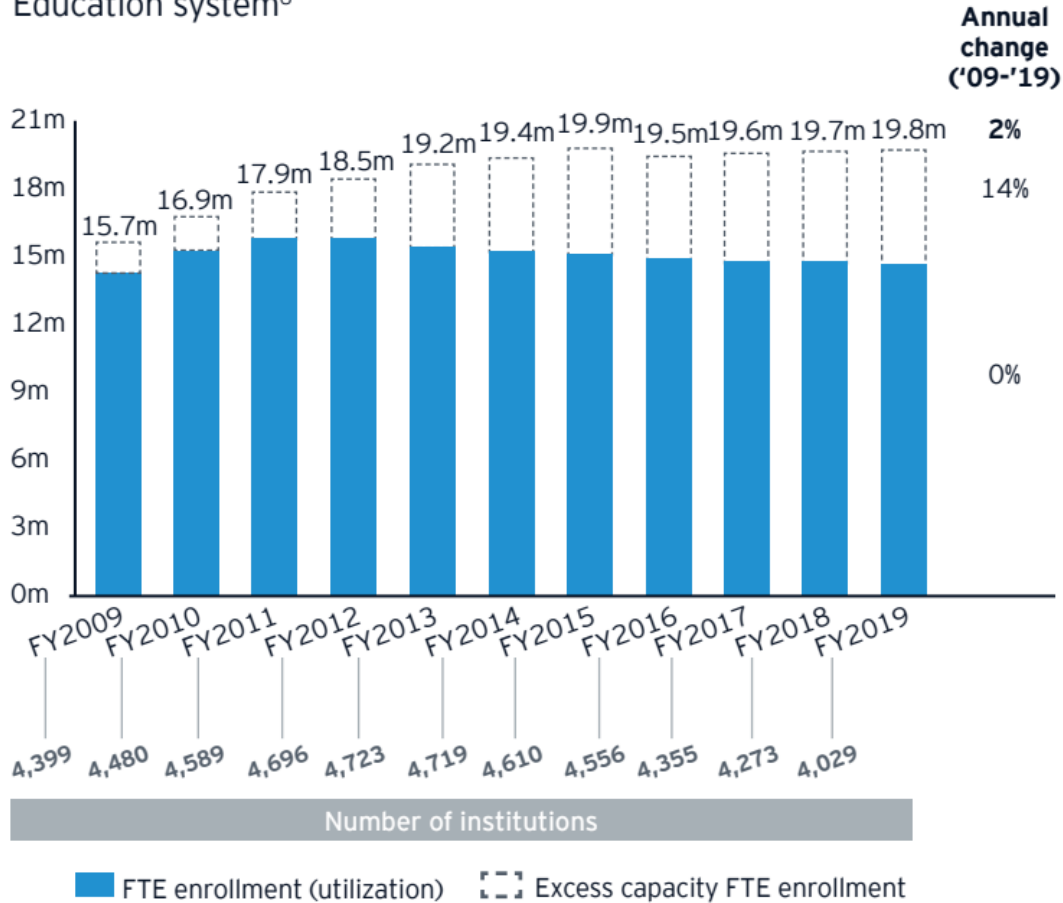
Technology and digital  
transformation



Changing nature of work  
and credentials

# There is a Clear Over-supply of Higher Education

Figure 2. Excess and utilized capacity in the US Higher Education system<sup>6</sup>



Decreasing numbers of high school graduates

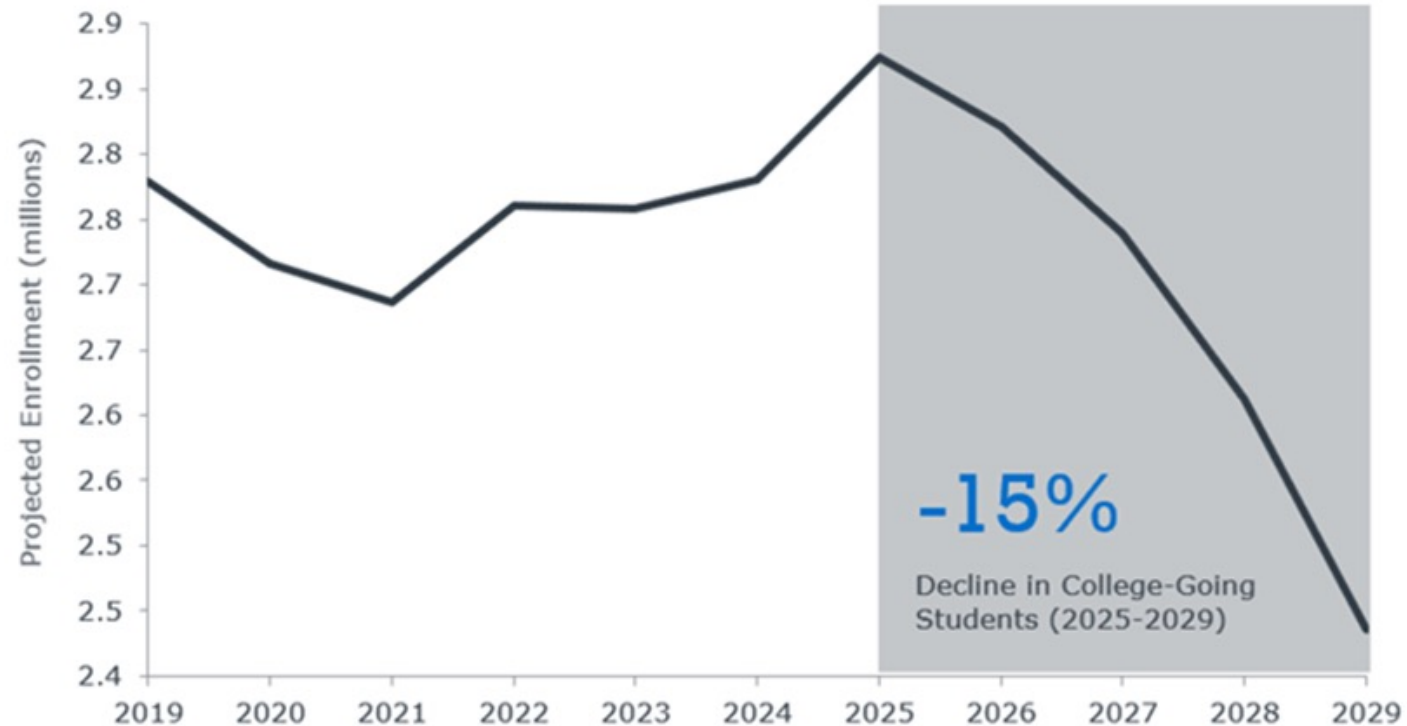
Decreasing interest in four-year education / questions of ROI

The cost of excess capacity could be as high as \$50 billion annually

# Declining Number of High School Graduates and Fewer Enrollments Are Causing Financial Pressure

## Enrollment Projected to Drop Sharply After 2025

Forecasted Number of College-Going Students in the U.S. (millions), by Year of High School Graduation



## Update on Recent Enrollments:

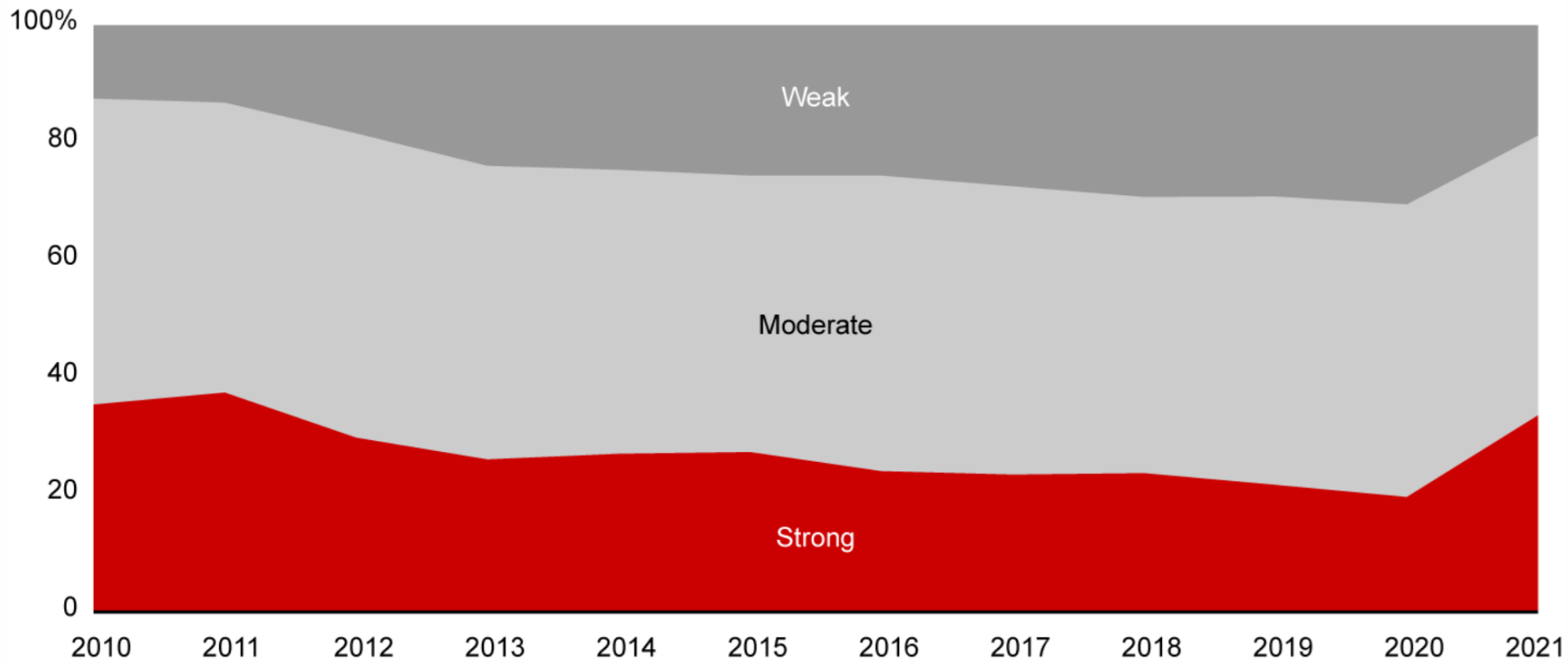
Undergraduate enrollment remains 15% below 2010 levels, the most recent headcount peak. Analysts expect enrollment to continue shrinking because of a strong labor market and the resumption of student loan payments.

Enrollment has recently declined at all levels, with the steepest declines in the undergraduate sector. Here, enrollments have fallen year-over-year for the past two years, **-4.9% in spring 2021**, **-4.7% in spring 2022**, and another **-0.2% in spring 2023**.

However, graduate-level enrollments have been more resilient throughout the pandemic. They decreased by only -0.1% in spring 2020, grew by 4.6% in spring 2021, declined -0.8% in spring 2022, and declined again by -2.2% in spring 2023.

# The Majority of Universities and Colleges Are In a Weak to Moderate Financial Position

The annual composite score measures a university's resiliency based on three equally weighted metrics: **primary reserve ratio**, **net margin**, and **three-year enrollment growth**



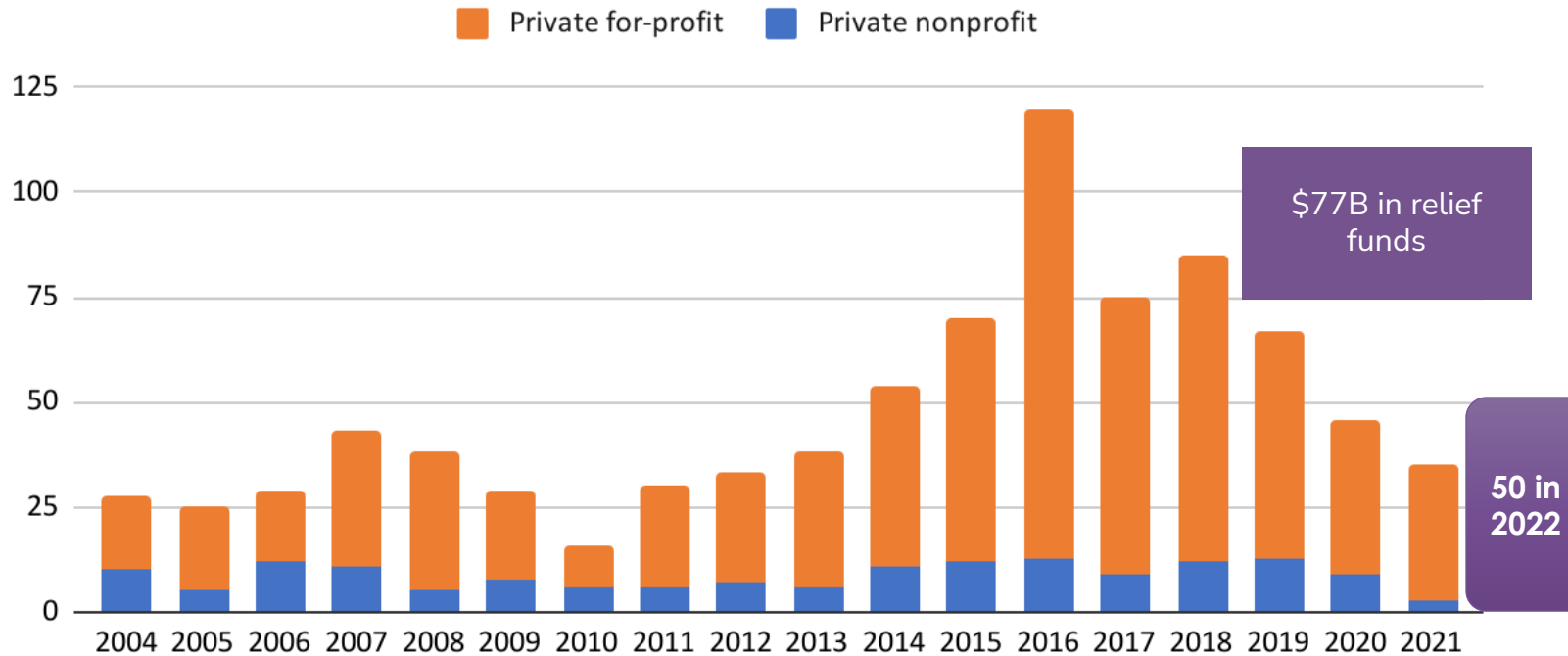
Temporary uptick due to significant federal support and strong endowment returns (not likely to be sustainable).

Note: n=1,504

# We Expect More Closures in the Future

## College closures

861 colleges and universities have ceased operations since 2004



Data source: SHEEO analysis of PEPS database at U.S. Department of Education

- According to EY-Parthenon, **80% of college closures have fewer than 1000 students.**
- 861 colleges and 9,499 campuses have closed since 2004
- Fitch Ratings issued a deteriorating outlook for U.S. colleges and universities in 2024, citing high labor and wage costs, elevated interest rates and uneven enrollment gains across the sector.

# Cooperation Could Also Be Key For Survival

- A macro trend is forming that will see multiple institutions join or create Private System Affiliation (PSA) supporting organizations and Course Sharing.
- Private institutions will have an opportunity to access a significant depth of resources to grow their revenue and transition their business model.
- **Clayton Christenson's prediction: "by 2028, a quarter of universities in the US could go bankrupt, merge, restructure or close" – not likely to happen at that pace but still coming**



National  
University  
System



arize



The Council of  
Independent Colleges

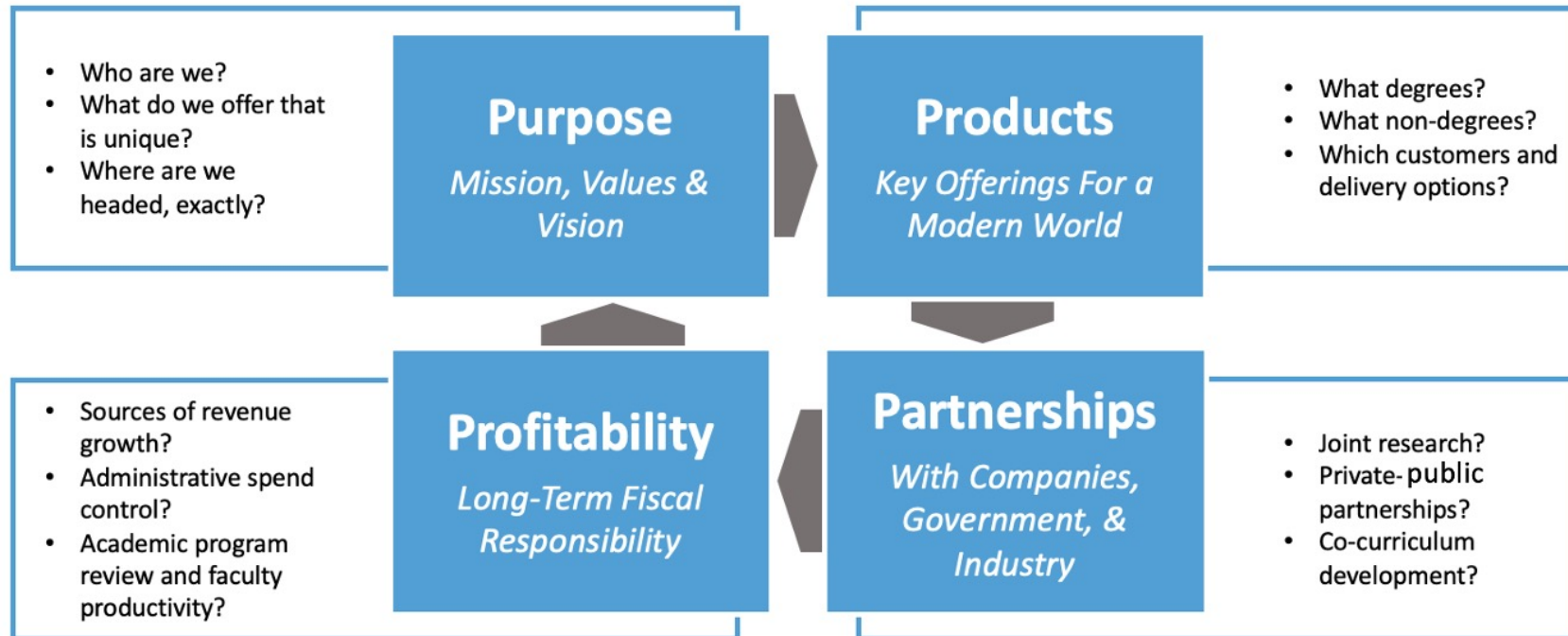
*Over the next five years, private system affiliation models and course sharing will increase.*





# A Framework For Strategic Priorities Over The Next Decade

## Declining Enrollments



# Perspectives From Special Guests



**JuliAnn Mazachek, PhD**

President, Washburn University

Served as Vice President for Academic Affairs and CAO at Washburn from 2016 to 2022

Previous President and CEO of the Washburn University Alumni Association and Foundation



**John Dietrick, JD**

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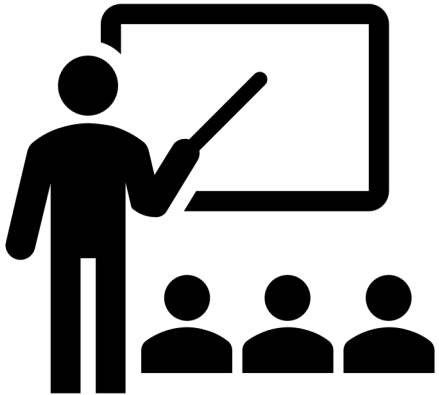
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# Participant Exercise 1 – Strategy Recall

- From memory, write down the mission, vision, values, and priorities for your institution
- Discuss your experience with this exercise with your table group
- Report out

# Today's Agenda



1. What is Strategy

**2. How to do Strategy**

3. Tips for Moving Forward

# Our “Strategic Action” Methodology

## Assessment

- Review financials
- Benchmark key data
- Review strategic plans
- Analyze competitors

## Visioning

- Create strategy statements
- Share with campus community and gather feedback
- Obtain input from board

## Implementation

- Create objectives, initiatives, and metrics with campus leaders
- Finalize plan with timeline and high-level budget
- Obtain approval from board

SWOT & Supporting Analyses

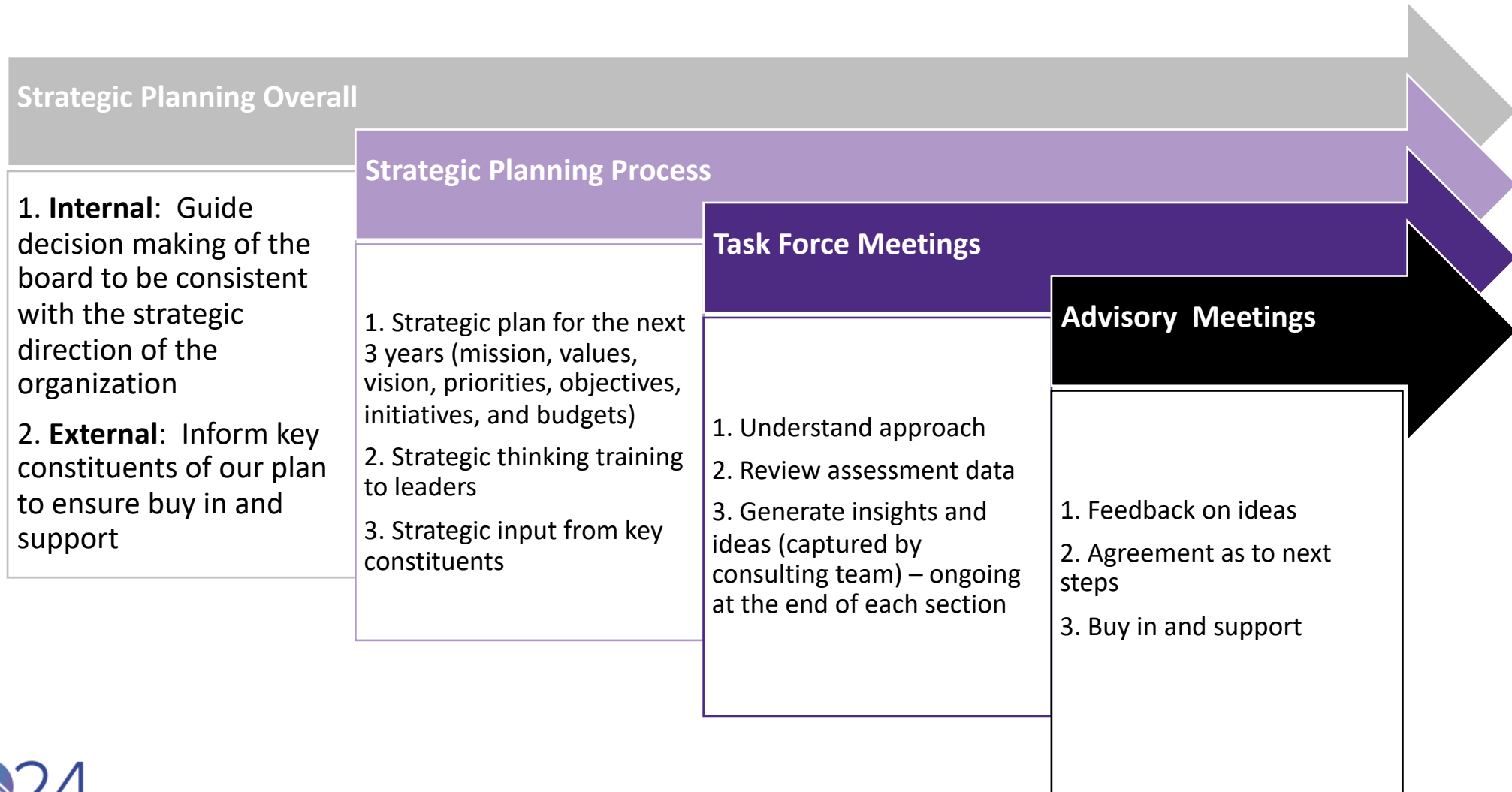
Strategic Framework

Implementation Plan

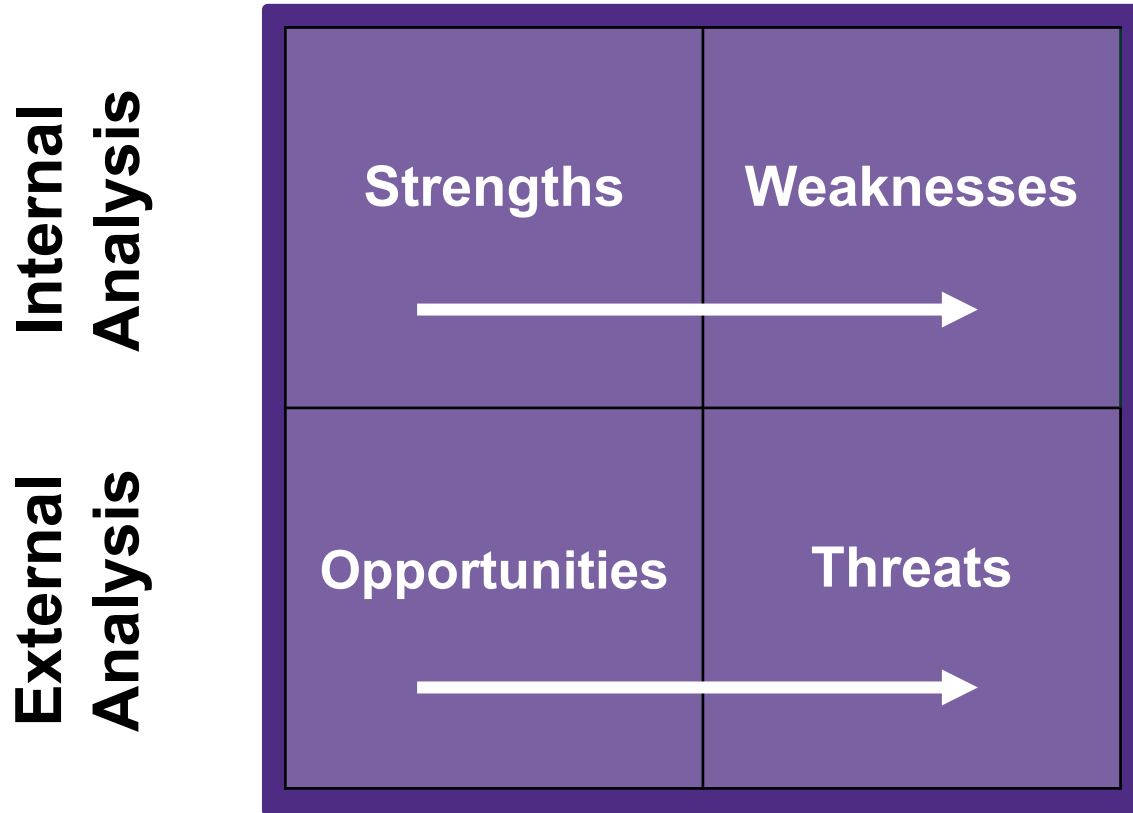
### Transformation Priorities

- Articulate Clear Strategy
- Identify prosperity gap
- Right size programs/faculty
- Streamline administration
- Grow enrollments
- Invest in new programs
- Connect to capital campaign

# An Overview Of The Strategic Planning Process



# Utilizing the SWOT Analysis



Traits within our organization that we could leverage in the future or mitigate through strategic actions

Elements outside of our organization over which we have no direct control but that could (and should) affect our strategy



# Break





# Implementation Planning: Objectives, Metrics and Initiatives

## Priority

Thing we do to live our mission and achieve our vision; first of mind; more important than other things; could be noun or verb statement

## Objective

Thing aimed for or sought after; achieving the objective will indicate progress toward our priority (Note that each objective has metrics/outcomes that measure the progress and targets which are the target within that metric.)

## Initiatives

Project or action that is carefully defined and designed to achieve your objective (will ultimately have owners who lead and report out on progress)



# An Illustrative Example of a Clear Strategy

## Proposed Strategy Statements – Hypothetical Regional Public University

**Mission**

Creating leaders to impact society

**Vision**

Become the university that students call home

**Values**

Student Focused  
Equity & Diversity  
Outcomes & Accountability

**Priority 1**

Create a compelling vision around student success, personalized education, and athletics

**Priority 2**

Grow research in high-impact disciplines

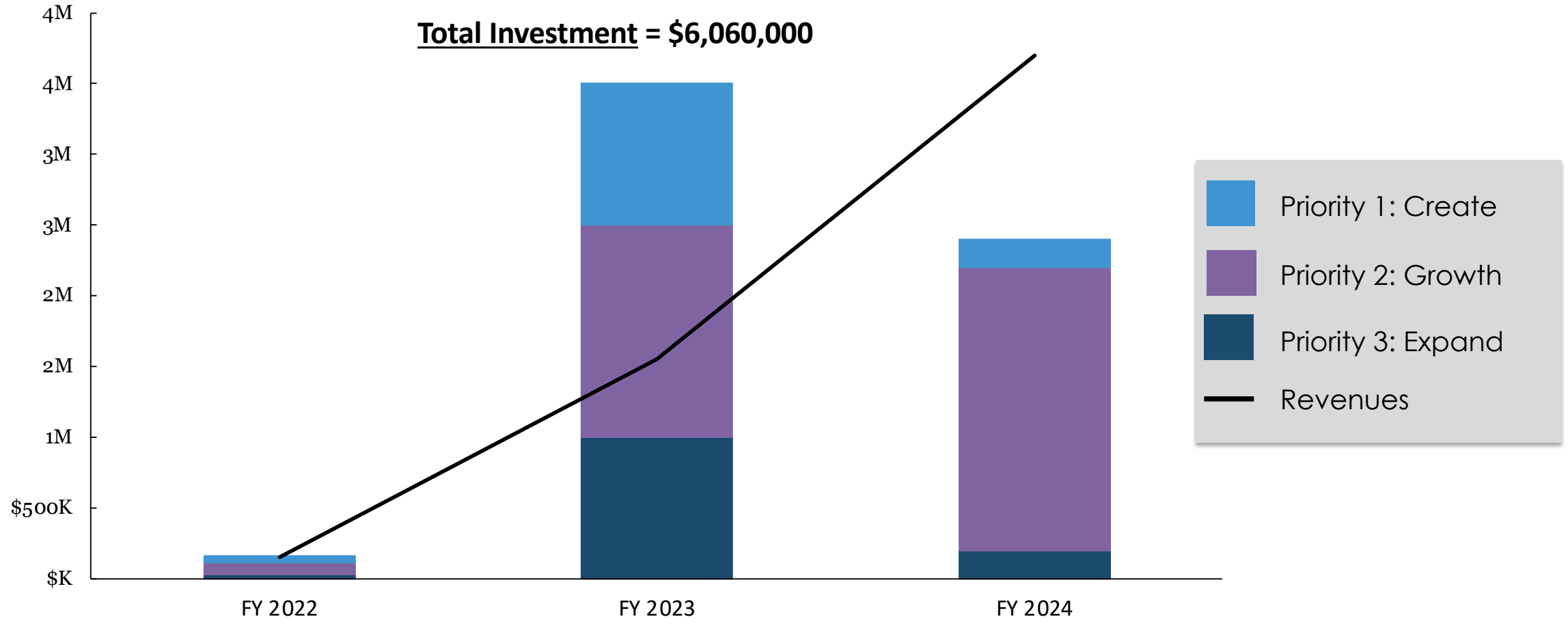
**Priority 3**

Expand external partnerships

# An Illustrative Example of a Clear Implementation Plan

	Priority 1: Create a compelling vision around student success, personalized education, and athletics			Priority 2: Grow research in high-impact disciplines			Priority 3: Expand external partnerships		
	Objective 1.1: Launch New Strategic Vision	Objective 1.2: Conduct Program Review to Reallocate Resources	Objective 1.3: Expand Athletic Programs	Objective 2.1: Develop Academic Plan	Objective 2.2: Research & Innovation	Objective 2.3: Create Nursing School	Objective 3.1: Develop Modern Pedagogies and Offerings	Objective 3.2: Strengthen Relationships with Employers, Alumni, and Partners	Objective 3.3: Launch New Online Program with Community Colleges Nationwide
Initiative 1 (Y1)	Assist all divisions and colleges in university-wide strategic refresh effort	Examine student enrollments, demand, and fit with faculty	Benchmark athletic programs and student success against peers	Prioritize research areas and redesign faculty incentives accordingly	Launch research institutes and grant writing office	Solicit input from stakeholders and finalize acquisition target strategic scoring matrix	Conduct market analysis of target student populations, demand, and competitive offerings	Expand partnerships with employers interested in diverse student graduates	Build business plan for expansion of degree completion programs and target markets
Initiative 2 (Y2)	Develop multi-year strategic performance dashboard	Eliminate lowest performing programs and invest in high market demand areas	Invest in athletics department, coaches, and new sports	Hire additional research faculty	Create equity fund and incubation facilities	Identify acquisition targets and conduct due diligence on top-scoring candidates	Invest in current and new digital offerings; promote inclusive pedagogical techniques	Grow key alumni engagement; invest in analytics and staff to prepare for comprehensive campaign	Create seamless transfer routes with community colleges in our state and beyond
Initiative 3 (Y3)	Share division and college level results on an annual basis	Communicate reputation for retention, graduation, and post-employment success	Leverage athletic programs to target prospective students nationwide	Create endowment to support research and launch academic journal	Expand commercialization and tech transfer capabilities	Develop robust integration plan, complete acquisition, and hire key leaders	Launch new micro-credential, certificates, and non-degree executive education offerings	Invest in incubator and SBD offices	Launch national advertising campaign to expand program
Underlying Values	Student Focused			Equity & Diversity			Outcomes & Accountability		

# Example: University XYZ (Hypothetical Small Public Institution) – Strategic Investments



# Perspectives From Special Guests



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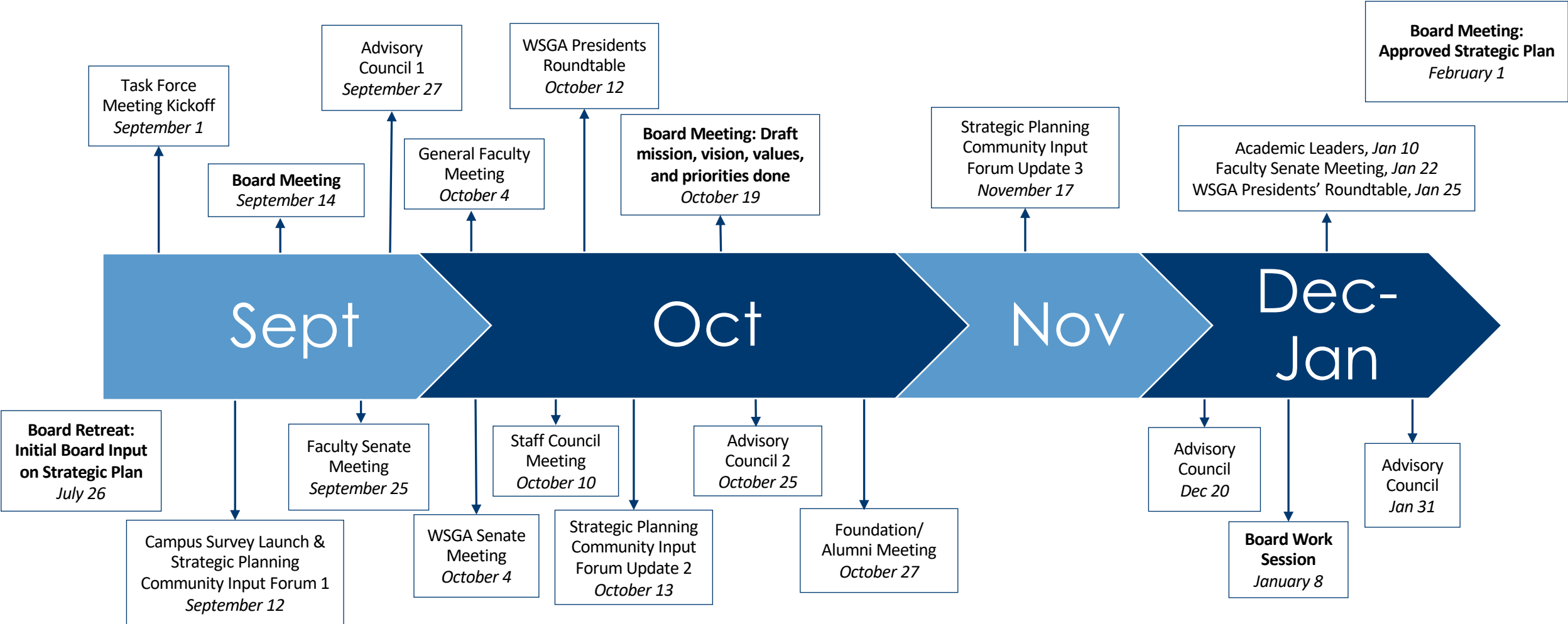
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# Washburn's Project Timeline and Deliverables



# Thriving Together: Washburn Strategic Plan FY24 to FY28

## Final Strategy Statements

### Motto

“Non Nobis Solum” (Not For Ourselves Alone)

### Mission Statement

“Washburn creates educational pathways to success for everyone”

### Vision Statement

“A premier community of higher learning focused on life and careers”

### Values Statement

“Creating positive \*IMPACT”

# Thriving Together: Washburn's Priorities, Objectives, and Initiatives

	Priority 1: Expand learner success opportunities and pathways			Priority 2: Enhance our environment to learn, work, and thrive			Priority 3: Accelerate collaborative partnerships to grow the community		
	Objective 1.A: Enhance current and develop new and innovative academic pathways and programs	Objective 1.B: Increase number of Northeast Kansans who participate in postsecondary education	Objective 1.C: Enable equitable opportunities	Objective 2.A: Optimize campuses to offer superior learning and working environments	Objective 2.B: Enhance work environment in order to become an Employer of Choice	Objective 2.C: Foster an engaging and energetic environment of vibrancy, belonging, and safety	Objective 3.A: Fortify interdependent relationship among Washburn, Topeka & Shawnee County	Objective 3.B: Expand collaboration with education, business, industry and government to serve the needs of learners & employers	Objective 3.C: Implement new state-of-the-art programs to support industry needs & enable economic growth
<b>Initiative i.</b>	Optimize academic portfolio of program offerings to attract learners and prepare graduates for success	Expand outreach and opportunities to Northeast Kansas to make postsecondary education a possibility for more learners	Increase academic success of all Washburn learners	Develop a master plan for all campuses to 2030 and beyond	Evaluate, develop and maintain competitive compensation and benefits for all employees	Optimize engagement opportunities for all learners with academic, athletic, culture, organizational, & community activities	Tell Washburn's story in our community & across the state to increase awareness and support of Washburn & its educational and cultural opportunities	Further develop & formalize effective advisory boards with employers & leaders to inform & support curricula & programs	Collaborate and strengthen partnerships with K-12 schools in our community to support students in their learning journeys & paths to careers
<b>Initiative ii.</b>	Increase number of experiential learning opportunities beyond the classroom	Increase postsecondary attending rates of Northeast Kansans at Washburn	Grow the number of learners from underrepresented groups	Emphasize development of gathering spaces for learners, faculty, & staff to learn, work, & build community	Enhance training, orientation, and ongoing professional development for all employees	Develop programs and activities to enhance a culture of wellness and belonging for all	Promote Washburn in Topeka & Shawnee County, leveraging our partnership and programs to further develop a thriving college-town environment	Expand apprenticeship & internship opportunities for learners with regional employers	Develop interprofessional health-related educational programs & opportunities
<b>Initiative iii.</b>	Meet the needs of adult learners in the community we serve	Increase number of pathways with Kansas postsecondary institutions	Increase the number students served in targeted learning populations (first-generation, military, corrections, CEP, and high school)	Execute the planned and funded building and renovation projects	Evaluate and improve key operational processes	Foster safety on campus and engage city and county partners to improve safety in our surrounding community & on routes to campus	Support success of the community's strategic plan – Momentum 2027	Implement a best-practices, career-engagement model to provide comprehensive career services for learners & employers	Create programs anticipating regional and state needs in manufacturing and aviation



# Ursuline College Strategy Statements

## Mission Statement

Ursuline College offers holistic education that transforms students for service, leadership, and professional excellence by providing undergraduate and graduate programs that foster lifelong learning and personal wisdom in an environment characterized by:

- (1) Catholic and Ursuline heritage,
- (2) Women-centered learning,
- (3) Values-based curricula, and
- (4) Inclusive, global perspective

## Vision Statement

A premier Catholic institution of higher learning that provides transformative experiences and inspires greatness in our graduates.

## Values

Embedded in our mission are four core values that further describe the heart of Ursuline College's mission:

- (1) Student Focus,
- (2) Spirituality,
- (3) Respect, and
- (4) Collaboration

Ursuline College 

# Ursuline College Expansion of Values

## Student Focus

- Demonstrate that students are our priority
- Support student learning
- Measure our success by the success of each student
- Empower students to take responsibility for their own education and future

## Spirituality

- Balance action with contemplation
- Develop awareness of spirituality, faith, and religion
- Increase awareness and clarity about personal and professional values
- Leave the world a better place

## Respect

- Demonstrate dignity and respect for everyone
- Value, trust, and help each other
- Strive for justice and fairness in all relationships
- Recognize and acknowledge achievement on every level

## Collaboration

- Involve others to multiply effectiveness
- Achieve goals through productive cooperation in the college and world community
- Appreciate synergy that comes with involvement from multiple perspectives

Ursuline College 

# Leading a Legacy: Ursuline College Strategic Plan 2017-2023 Strategic Priority Areas (1 of 2)

Strategic Priority Area	Description	Action Steps
<b>Women-Focused Institution</b>	As a leader in women's education, refine our curricular and co-curricular activities, and develop a range of community partnerships, to provide our students with knowledge, skills, and experiences to foster their growth in leadership.	<ul style="list-style-type: none"> <li>• Implement professional development on women's leadership.</li> <li>• Audit all programs for women's leadership focus.</li> <li>• Develop a women's center focused on research on and services to women, including web presence, partnerships, speaker series, and student scholars program.</li> <li>• Develop and assess a plan for daycare.</li> <li>• Explore pay scale.</li> <li>• (New in 2020) Promote leadership, wellness, and academic excellence through Women's Center programs that underscore the College's mission and its commitment to promoting and celebrating diversity among students, faculty, and staff.</li> <li>• (New in 2020) Achieve increased recognition, enrollment, and revenue for the College in the NEO community and beyond for helping women from diverse backgrounds advance in all aspects of their lives through the Institute for Women, Wellness, and Work.</li> </ul>
<b>Program Portfolio</b>	Expand our mission-attentive portfolio by building on our health care-related and other dynamic programs, adjusting promoting our remaining programs, and supporting our students in their leadership development for a diverse society.	<ul style="list-style-type: none"> <li>• Review the appropriateness and strengthen the effectiveness of the academic program decision-making process.</li> <li>• Prune the number of current undergraduate majors and graduate programs.</li> <li>• Create a process so that all new programs receive internal review and decision within 90 days.</li> <li>• Develop a strategic process for creating college partnerships and community-based advisory boards.</li> <li>• Create a student signature experience.</li> <li>• Identify, implement and promote new academic programs.</li> <li>• (New in 2020) Audit the curriculum to recognize how each program contributes to our mission and to lay a foundation for innovation and collaboration to advance it.</li> <li>• (New in 2020) Enhance and extend existing programs and create new programs in ways that are consistent with Ursuline's mission and commitment to diversity and that drive enrollment.</li> <li>• (New in 2020) Prepare students for a diverse world by providing inclusive-attentive academic programs and enacting a more diverse and inclusive Ursuline College community.</li> </ul>

# Leading a Legacy: Ursuline College Strategic Plan 2017-2023 Strategic Priority Areas (2 of 2)

Strategic Priority Area	Description	Action Steps
<b>Marketing and Recruitment</b>	Develop and implement a marketing plan that leverages our women's focus and our health care-related and other dynamic programs to recruit from targeted geographic areas to grow enrollment substantially, especially in the post-traditional student market.	<ul style="list-style-type: none"> <li>• Conduct market research study on community awareness.</li> <li>• Develop and implement a marketing communications plan to build awareness and boost enrollment.</li> <li>• Develop strategic approach to establishing relationships with high schools and community colleges.</li> <li>• Expand relationships with employers to increase enrollment and philanthropy.</li> <li>• Conduct micro-searches to support recruitment.</li> <li>• Conduct a review of pricing strategy to assess advisability of flat tuition.</li> <li>• Complete renovation of science labs.</li> <li>• Conduct a study to assess demand for graduate programs and competitor pricing.</li> <li>• (New in 2020) Conduct a diversity and inclusion audit of College marketing and recruitment communications. Ensure that communications are oriented toward forming positive long-term relationships and fostering the College's mission and diversity-driven focus.</li> <li>• (New in 2020) Create a comprehensive enrollment plan for the post-traditional market and conduct appropriate external research to assist with market prioritization and creation of business plan for new or enhanced existing programs.</li> <li>• (New in 2020) Create and implement strategy to strengthen communication of our value proposition across all student segments.</li> </ul>
<b>Retention and Graduation</b>	Enhance our campus environment and our use of human, technological, and financial resources to improve student retention and graduation rates substantially by personalizing the student experience in our diverse community.	<ul style="list-style-type: none"> <li>• Offer first year Pell persistence grant.</li> <li>• Create competitive residential halls.</li> <li>• Improve Ursuline's technology footprint.</li> <li>• Create a Student Union space.</li> <li>• Expand opportunities for work study and student work on campus.</li> <li>• Establish an Office of Student Success.</li> <li>• (New in 2020) Demonstrate our commitment to student success through innovative leadership opportunities and engagement efforts that begin before arrival and continue after graduation.</li> <li>• (New in 2020) Expand personalized academic support programs for students.</li> <li>• (New in 2020) Enhance the campus environment and functionality, its technology equipment and services and its aesthetics; conduct a classroom and community space needs assessment.</li> </ul>

# Participant Exercise 2 – SWOT

## Strengths

- List strengths here (only include your top 3)

## Weaknesses

- List weaknesses here (only include your top 3)

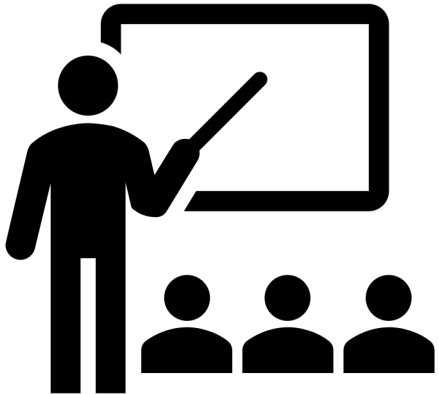
## Opportunities

- List opportunities here (only include your top 3)

## Threats

- List threats here (only include your top 3)

# Today's Agenda



1. What is Strategy

2. How to do Strategy

**3. Tips for Moving Forward**

# We Consider A Wide Range Of Potential Strategic Actions

## Optimize Administrative Spend

*Assess level of investment vs strategy*

- Consolidate Purchasing
- Cut Staff
- Re-engineer Processes
- Outsource
- Centralize/Shared Services
- Modernize Technologies
- Merge Multiple Locations
- Increase Spans of Control
- Decrease Energy Use

## Increase Academic Program Returns

*Rationalize academic offerings based upon demand*

- Sunset Programs
- Grow Existing Programs
- Launch New Programs
- Increase Teaching Loads
- Hire More PT Faculty
- Hire More NTT Faculty
- Freeze New Faculty Hires
- Decrease # of Faculty
- Increase Student Retention

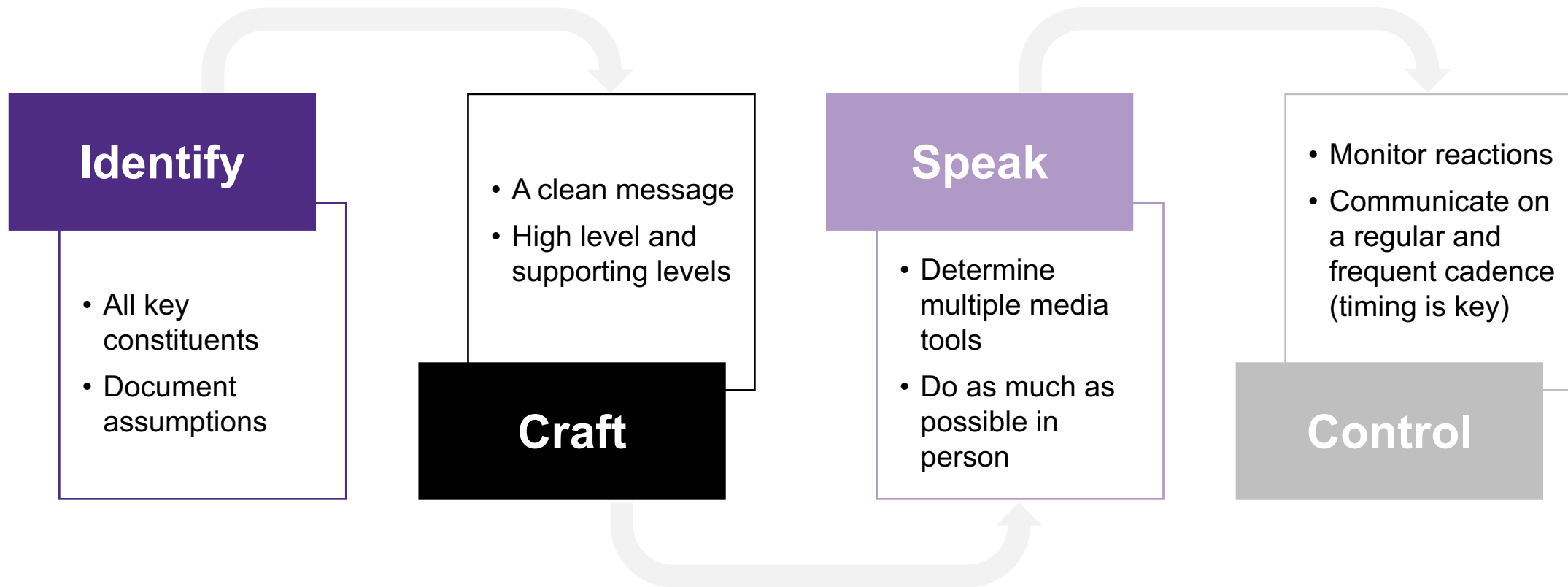
## Grow Resources

*Increase enrollments and revenue*

- Launch New Development Campaign
- Determine Unique Positioning
- Invest in Advertising Campaigns
- Collaborate with Other Universities
- Pursue PPPs (facilities, energy, etc.)
- Launch Medical Services
- Develop More Executive Education
- Increase Online Program Offerings
- Secure New Debt Offerings
- Grow Research Portfolio
- Sell Excess University Assets (land, etc.)



# Critical Success Factors For Strategic Communication





# Tips For Improving Strategic “Action” Today

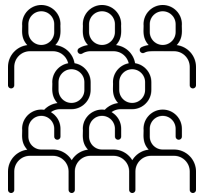
- How can modern strategic planning be **BETTER?**
  - Truly seek differentiation in what you do
  - Focus on strategic vs. operational issues
  - Tackle the hard challenges
- How can modern strategic planning be **STRONGER?**
  - Craft strategy “slogans”
  - Involve your campus in the strategy process
  - Manage the change carefully (use Kotter Model)
- How can modern strategic planning be **FASTER?**
  - Shorten the strategic planning period
  - Keep the planning horizon to three years
  - Think of strategy as a living document

# Why Strategy Efforts Fail Framework

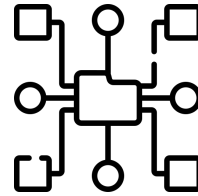
Mistake	Description	Advice
“Too many cooks in the kitchen”	Institutions include way too many people in the strategic planning process	Form a Task Force of 7 to 8 key faculty and staff as well as a larger advisory committee and engage the BOD before and after
“Everything but the kitchen sink”	Strategic plans often include numerous priorities, objectives, and initiatives	Limit the plan to 3 top strategic priorities and related objectives; allow campus leaders to develop detailed plans
“Donkey years”	The process can take between 6 months and 1 year or even longer	Shoot for 3 to 4 months of intense work with regular constituent updates and inputs
“The rubber doesn’t hit the road”	The plan is a wish list of things to do without prioritization or dedicated resources	Identify the level of effort needed per priority and allocate dollars and people accordingly
“You can’t manage what you don’t measure”	Some institutions put the strategic plan on the proverbial “shelf”	Assign metrics for the overall plan in each priority area; track progress quarterly and annually

# It is Imperative That Boards Have a Strong Foundation to Respond to Modern Challenges

## Effective Governing Boards and Strategies:



**Distinctions:**  
Trustee vs.  
Administrative  
distinctions and  
guardrails

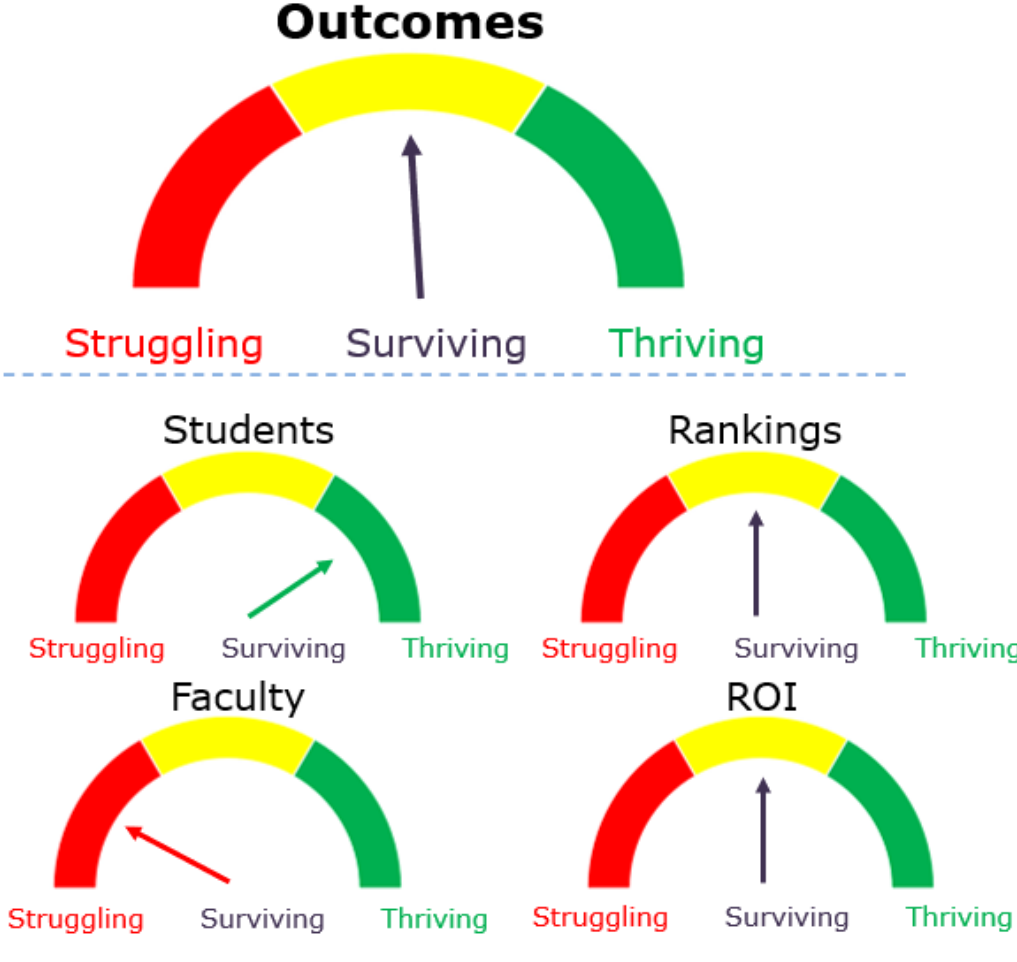


**Structures:**  
Are committee  
structures and  
responsibilities  
adequate?



**Process:**  
Are general  
board meetings  
and practices  
effective?

# You Will Want to Create and Track a Strategic Dashboard of Resources and Outcomes



# The Litmus Test of Strategy is Whether or Not There is Change – Keep This in Mind in Implementation

## Kotter Change Model

1. Create a sense of urgency
2. Build a guiding coalition
3. Form a strategic vision and initiatives
4. Enlist a volunteer army
5. Enable action by removing barriers
6. Generate short-term wins
7. Sustain acceleration
8. Institute change



# Perspectives From Special Guests



**JuliAnn Mazachek, PhD**

President, Washburn University

Served as Vice President for Academic Affairs and CAO at Washburn from 2016 to 2022

Previous President and CEO of the Washburn University Alumni Association and Foundation



**John Dietrick, JD**

Vice Chair, Washburn University Board of Regents, Mayoral Appointee

Principal at The Law Offices of John R. Dietrick, P.A.

JD from Washburn University School of Law and M.P.A from the University of Kansas



**Sr. Christine De Vinne, OSU, PhD**

President, Ursuline College

Previously a Dean at Ursuline College

Served as Vice President for Academic Affairs at Notre Dame of Maryland University

Previous President of the American Name Society

# Participant Exercise 3 – Your Action Plan Moving Forward

- Identify 3 key actions you plan to take with your board and institution related to strategy Monday of next week



# Discussion with Attendees

