THE SOARES GROUP

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The Soares Group is a consulting firm dedicated to enhancing the nation's human capital by aligning college and workforce education.

We support senior leaders in business, education and non-profits to build new education pathways to economic competitiveness, quality credentials and good jobs.

Emergent Strategy for Organizational Change is a diagnostic, planning and implementation tool for leaders seeking to build new education pathways.

Core

Research-validated components of effective teaching and learning – learner agency, curriculum, assessment, community, relationships.

Essential Activities

These activities are the operational core of providing learners access to and effective delivery of education programs, leading to credentials with labor market value.

Innovations

Experiment with new approaches to advance learners on a credential pathway by aligning core and essential activities with operating capabilities.

Operating Capabilities

Provide the foundation for a higher education institution to exist as well as plan, design, implement and manage education programs.

Ecosystem Variables

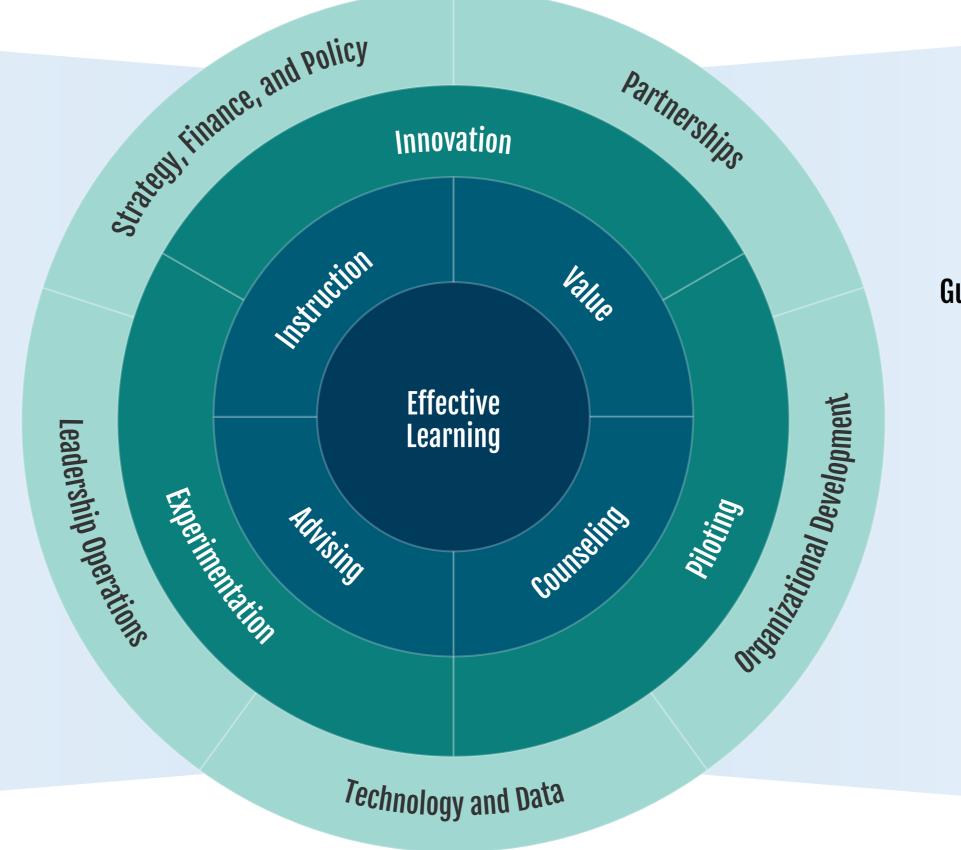
Larger context within which the institution exists and the stakeholders with whom it interacts.

Guiding Questions

High-level questions to connect today's reality and the future taking ecosystem and operating capabilities into account.

Ecosystem Variables

- Demographic trends
- Federal policy
- State policy
- Accreditation
- Local and regional economy
- Technological change
- Political and social environment
- Market competition
- Stakeholder interests



- What near term goals align current approach with emerging trends in the ecosystem?
- To which students are we best positioned to deliver value?
- What blend of educational delivery does this suggest?
- How might we best deploy faculty and staff?
- Is our current financial model appropriate?

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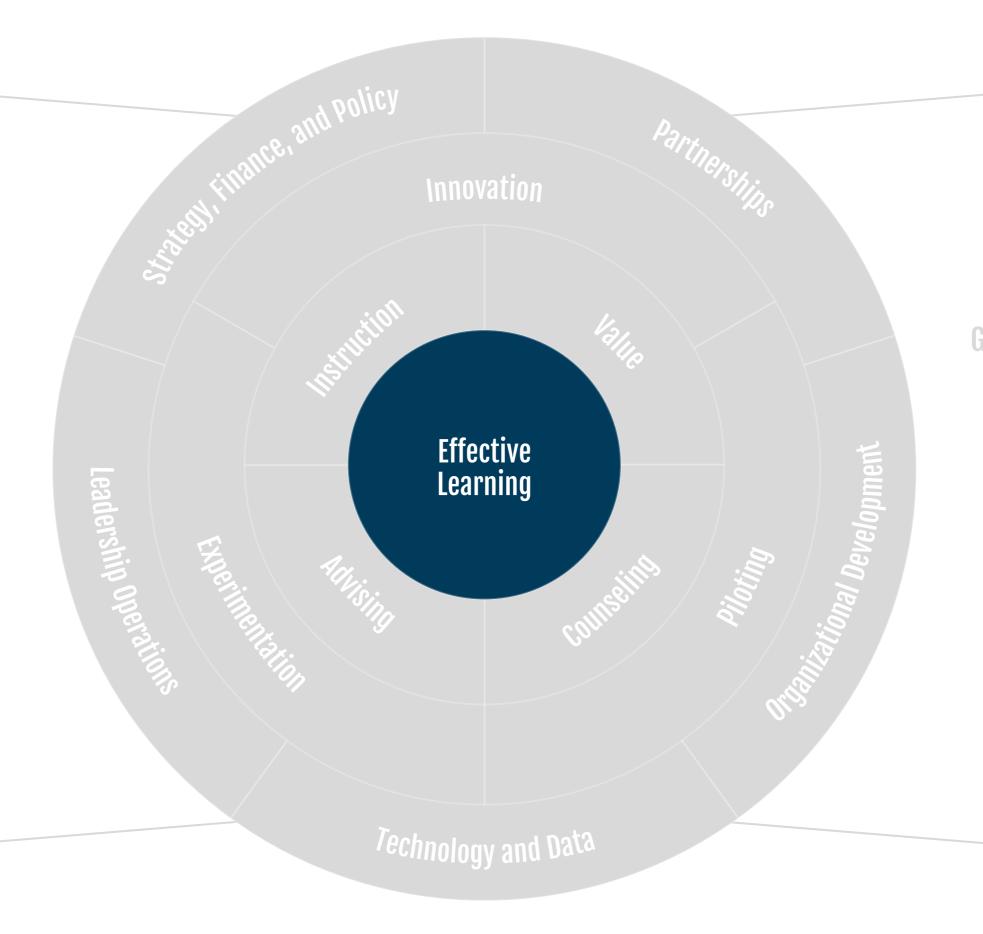
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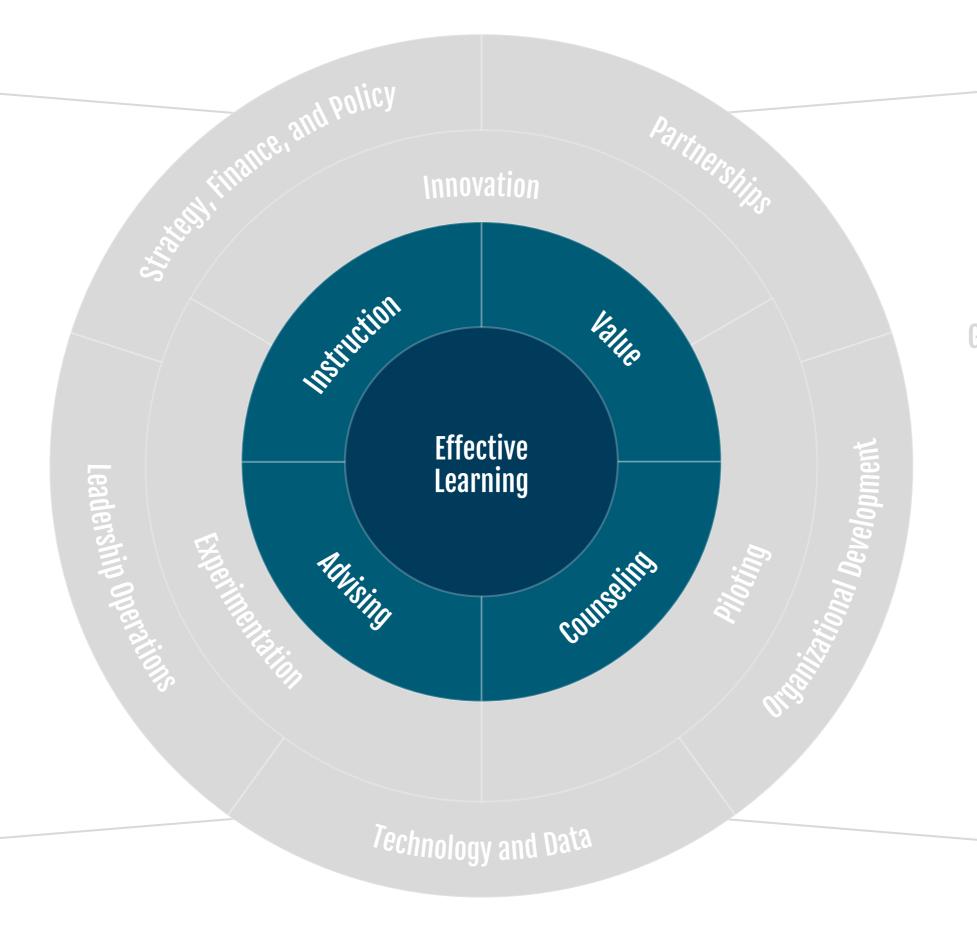
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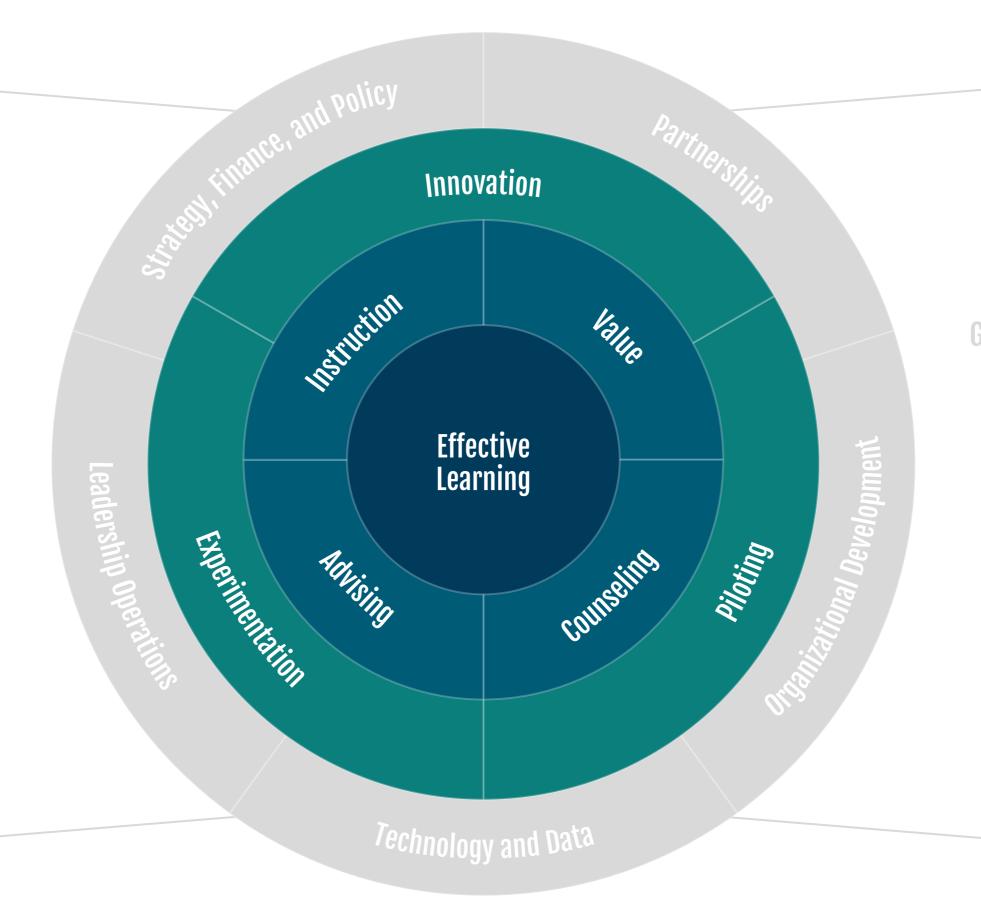
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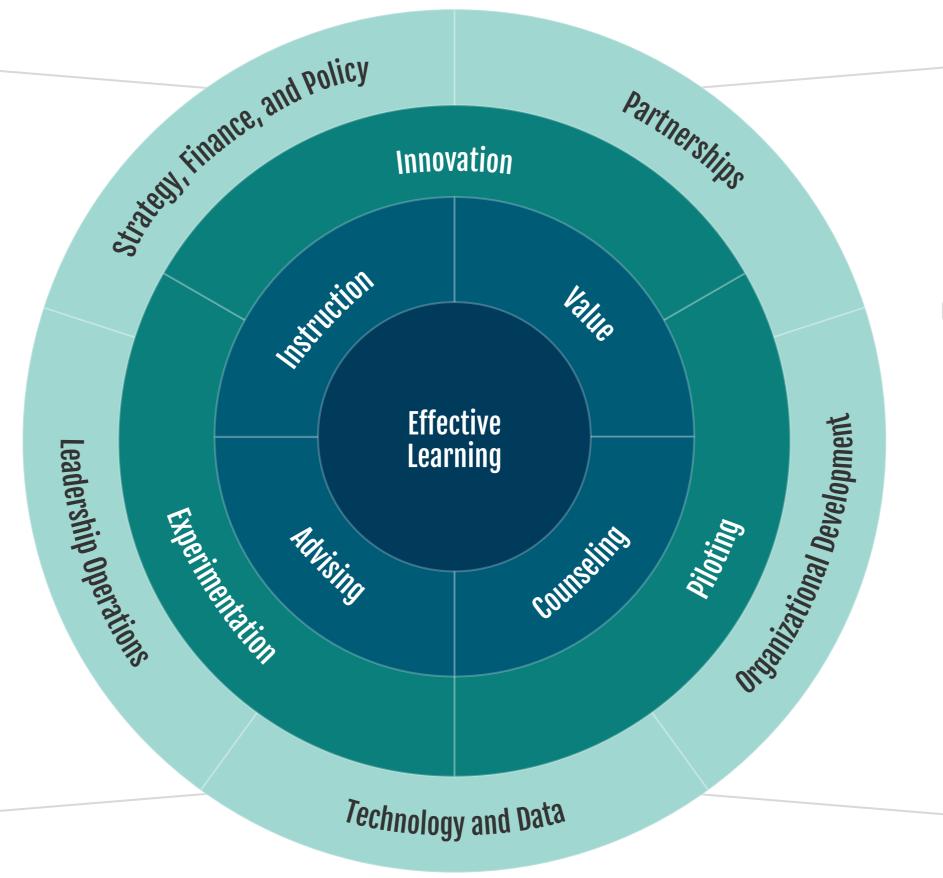
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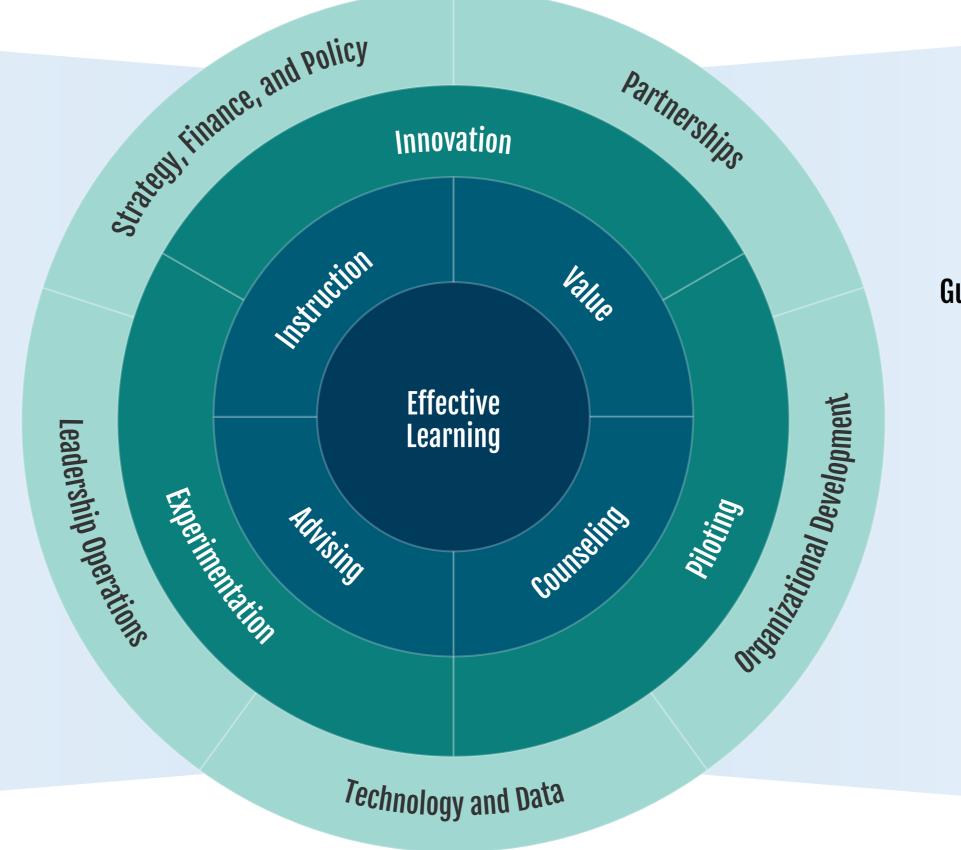
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The core of the college and university value proposition is, well, *learning*. Does the college create a sustained, and yet adaptable, environment, in which, the learner can enhance their knowledge, skills and abilities – leading to credentials of value — and build a foundation for a prosperous and fulfilling life?

In a fast-changing economy and society, delivering against a learning value proposition requires colleges and universities to balance mission and strategy with flexibility and adaptability in real time –organizational change and transformation are built into both today's and tomorrow's work.

The Soares Group Emergent Strategy model provides a strategic, yet agile and resilient, framework through which colleges and universities align and integrate learning success foundations, essential activities, operating capabilities, innovations to enhance student success and manifest the institutional value proposition. The model is intended as a visual tool to engage stakeholders in ideation about change and a high-level guide for framing transformation – a kind of emergent strategy.

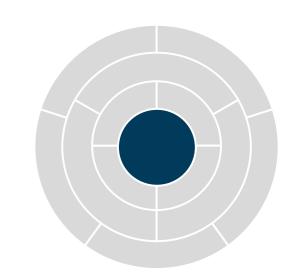
The **core elements of the model** are the five foundations of learning success:

- 1. Curriculum
- 2. Community
- 3. Learner Agency
- 4. Assessment
- 5. Relationship

An education experience built on these elements optimizes for learning success.

Core Elements of Learning Success

These elements are based on evidence from learning science, cognitive psychology and education practice concerning what underpins effective teaching and learning.



Curriculum

The education is based on a well-organized body of knowledge intended to develop understanding of foundational principles, clear goals and ways the learning can be applied in different environments. Applied learning is fully integrated into the education experience.

Assessment

Feedback is critical to successful learning, as such, the education experience incorporates formal and informal opportunities for feedback to continuously check and develop understanding and reward progress. Formative and summative assessment are used in tandem.

Community

Learning and knowledge creation are deeply social activities. The education experience is designed to create a community of diverse learners and perspectives with opportunities for peer learning that embraces intellectual curiosity, experimentation and failure as part of the process.

Relationship

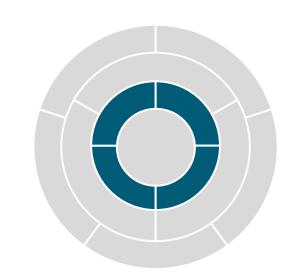
Learning is social thus relationships are a key to success. This core element emphasizes the importance of key relationships in learning success regarding the institution: learner/faculty, learner/staff, learner/culture and learner/systems. These relationships provide the foundation for transforming learner goals into education success in the form of completion and credentials. Increasingly, these relationships with be mediated and enhanced by artificial intelligence.

Learner Agency

Encompassing the concept of a student, the Learner Agency concept sees the whole human being – current understandings and work, family and community roles – as engaged in a college education experience. The concept embraces agency in designing and integrating life and education goals (e.g. credential attainment, lifelong learning) as well as demographic change and learner centered pedagogy.

Essential Activities

These activities are the operational core of providing learners access to and effective delivery of education programs.



Instruction

Planning and supporting the delivery of organized bodies of knowledge at the class, discipline and degree program level in ways that promote student completion of credential pathways.

Advising

Planning and delivering academic, professional and personal development services to provide students with support necessary to complete programs and achieve goals.

Counseling

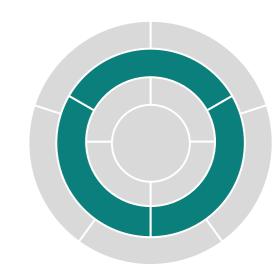
Planning and delivering services to ensure student well-being and mental health.

Value

Creating credential pathways, aligned business models and student financial support systems that promote access, affordability and completion.

Innovations

These activities experiment with new approaches to advance learners on a credential pathway by aligning core and essential activities with operating capabilities.



Experimentation and Piloting

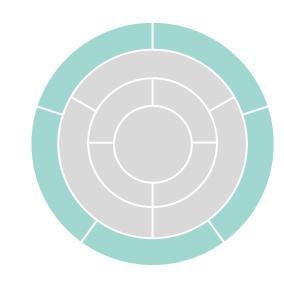
Innovations exist between core elements and essential activities and the day-to-day operating capabilities of the organization. This in between space is intended to provide opportunities for experimentation in which the college or university understands a new need or area of improvement and leverages core, essential and operating capabilities to test new solutions for efficacy and, if proven, expansion into a transformational effort.

Examples can include:

- Emergency financial grants
- Credit for prior learning
- Micro-credentials
- Online learning, etc.

Operating Capabilities

These activities provide the foundation for a higher education institution to exist as well as plan, design, implement and manage education programs.



Strategy, Finance & Policy

Strategic and financial planning alongside organizational mission, academic and administrative policies that provide the resources to run the enterprise, experiment based on learner needs and invest in what works is critical to both institution sustainability and transformation. Aligning these processes with core elements and essential activities is key.

Technology & Data

Today, technology in the form of learning management, resource planning, student information, and a host of other systems are deeply embedded in higher education delivery. Catalyzed by machine learning and artificial intelligence, technological systems are producing ever more data that can be used to enhance learning success. Using data to align human talent and technology is catalytic to both operational effectiveness and sustained transformation.

Leadership & Operations

Institutional leaders and Operational units provide an essential framework for implementing learning success focused transformation.

Leadership

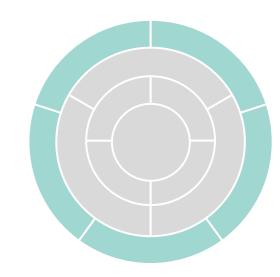
Boards, executive teams, and senior cabinet members bring the strategy, investment and policy to life for the organization, provide guidance implementation and accountability for performance.

Operational Units

Administration and academic functional units aligned via shared governance processes are essential to coordinate the day-to-day operations of the institution. These include: enrollment management, academic affairs, advising, career services, credit transfer, financial aid, admissions, human resources, advancement, marketing, public affairs and communications and finance. Further, as circumstances change, agile institutions continuously align and integrate policies and initiatives that serve diverse learner populations, enhance their value proposition, and fulfill their mission.

Operating Capabilities

These activities provide the foundation for a higher education institution to exist as well as plan, design, implement and manage education programs.



Organizational Development

Today change and adaptation are a daily reality on most campuses.

Leaders, systems and policies must create the mechanisms to recruit top talent, support faculty and staff development to facilitate learning success and promote a culture of learning for the institution.

Partnerships

Learning success is a team-based endeavor. Colleges and universities need to leverage technology, employer and community partners that have complementary solutions and expertise to build an organizational capability for sustained learning success.

Operating capabilities are, in turn, informed by both environmental factors and institutional choices made in the context of these factors at a given point in time.

Ecosystem Variables & Guiding Questions

Ecosystem Variables

The larger context within which the institution exists and the stakeholders with whom it interacts.

All higher education institutions exist in a larger ecosystem of public and private stakeholders over whom they have limited control and, yet, with whom they are interdependent. This component of the model is meant to provide a way to visualize inter-relatedness and possible impact. Economic, social, political, marketplace, regulatory and policy areas that both frame and impact college and university structure and competitiveness. These variables must be taken into consideration while leading and managing through institutional transformation.

Guiding Questions

High-level questions to connect today's reality and the future taking ecosystem and operating capabilities into account.

As a college or university interacts with its ecosystem, in real time, assessing today's approach to education and emerging learner needs for tomorrow, a series of questions can help frame the relationship between core elements, essential activities and operating capabilities in ways that surface what new innovations might be needed. Some key guiding questions include:

What near term goals align current approach with emerging trends in the ecosystem?

To which students are we best positioned to deliver value?

What blend of educational delivery does this suggest?

How might we best deploy faculty and staff?

Is our current financial model appropriate?

Definition & Process

Emergent Strategy for Organizational Change is defined as a strategic, yet agile and resilient, framework through which colleges and universities assess environmental factors and contextualize institutional choices to align and integrate core elements, essential activities, innovations and operating capabilities to enhance learning success and manifest the unique institutional value proposition.

The model is intended as a visual tool to engage stakeholders in ideation about change and a high-level guide for framing transformation.

While each institution context is unique, typical steps in a transformation process include:

- Begin with the institutional mission and values as the framework for change
- Keep learning success at the center of organizational analysis and innovation.
- Promote and empower a shared leadership model
- Engage the campus in dialogue to develop a shared vision
- Employ data-driven analysis of existing assets, needs, capabilities, and opportunities
- Emphasize financial sustainability from conceptualization through implementation
- Commit to continual improvement and on-going assessment, remaining ready to adapt to emerging circumstances
- Engage deep and integrated organizational and cultural change over time

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Thank You

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