Discussion topics

- Introductions and Overview

- Plenary: Strategy Formulation Under COVID – Survive and Thrive

- Breakouts

- Report Outs

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- **Introductions and Overview**

- Plenary: Strategy Formulation Under COVID – Survive and Thrive

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Program Overview

WACUBO · **ABC** INSIGHTS — A HelioCAMPUS COMPANY

Your Hosts:

SESSION 1-2:

Paul Friga, Ph.D.
Strategy Prof. at UNC CH, Co-founder of ABC Insights
Focus on university strategy and efficiency/effectiveness
Previously with PwC and McKinsey
B.S. St Francis University, MBA & Ph.D. UNC-CH

SESSION 3-4:

Howard Teibel
Founder, Teibel Education Consulting
Leadership training in Higher Ed – commitments & action
State University of New York at Binghampton

Special Guests:

Dec. 2 2-3:30pm PT

Strategy Formulation Under COVID – Survive and Thrive

Ruth Johnston
Vice Chancellor, Strategic Chief Financial Officer, New Mexico State University

Dec. 16 2-3:30pm PT

Strategy Execution Under COVID – The Importance of Key Data

Rebecca Barber
Associate Vice President for Financial Planning, Budget, and Analysis, UNLV

Jan. 6 2-3:30pm PT

Cultivating Leadership Competencies

Lupe Valencia-Skanes
Associate Vice President for Business Affairs, The University of Texas at El Paso

Jan. 20 2-3:30pm PT

The Strategic Imperative of Diversity and Inclusion

Stefanie Johnson
Associate Professor of Management, University of Colorado Boulder

Opening Remarks:

Michael Clune, Ph.D

Senior Associate Vice Chancellor and Chief Financial Officer, University of California San Francisco

Welcome Participants!

Community Colleges

Wendy Davis	Cochise College
Cheryl Heath	Northern Wyoming Community College District
Katherine Perry	Mesa Community College
Sylvia James	Pierce College Fort Steilacoom
Debbie Baker	Western Wyoming Community College
Gina Kidneigh	Northern Wyoming Community College District
Carie Edmiston	Peninsula College
Sheldon Flom	Linn-Benton Community College
Cherie Berthon	Washington State Board for Community & Technical Colleges

Small institutions - Private

Avo Kechichian	University of La Verne
Sherri Mylott	University of La Verne
Debra Martin	Mount Saint Mary's University
Donna Horn	Seattle University
Kara Wittmer	Seattle University
Deborah Stuker	Perry Technical Institute
James Angelosante	Gonzaga University

Medium – Private

Leslie Brunelli	University of Denver
Clint Emmerich	University of Denver
Mike Furno	University of Denver

Large – Private

Kelli Bagley	University of San Diego

Small institutions - Public

Joyce Lopes	Sonoma State University
Ana Karaman	Western Oregon University
Vessela Jivkova	University of California, Santa Barbara
Michelle Hammer Coffer	University of California, Ag & Natural Resources
Heather Heersink	Adams State University
LeeAnn Case	Eastern Oregon University
Gregory Krems	University of Colorado Colorado Springs
Stephanie Pope	Oregon Institute of Technology
Laurie Dixon	California State University, Monterey Bay
Yolanda Anglin	California State University, Monterey Bay
Julie Crea	Lewis-Clark State College
Mary Boyd	Colorado Mountain College
Kathleen Patrocinio	UC ANR - SAREP
Kendra Yoshimoto	University of Washington, Bothell
David Tamanaha	University of Hawaii Maui College
Kwabena Boakye	Grays Harbor College

Medium – Public

Jennifer Haft	California Polytechnic State University-San Luis Obispo
Ruth Johnston	New Mexico State University Main Campus
April Davidson	University of New Mexico, Main Campus
Kelly Sebastian	California Polytechnic State University-San Luis Obispo
Anne Gilbert	Western Washington University
Mariam Emyan	California Polytechnic State University-San Luis Obispo
Guadalupe Valencia	University of Texas at El Paso
Diane De Hoyos	University of Texas at El Paso
Michelle Cardona	California State Polytechnic University, Pomona

Large – Public

Penny Burgess	Oregon State University
Jon Giacomi	University of California, San Francisco
Shannon Turner	University of California, San Francisco
Nicholle Zarkower	University of Nevada, Las Vegas
Sarath Kraus	University of Nevada, Las Vegas
Michele Hassett	University of California, Davis
Heather Ortiz	University of Nevada, Las Vegas
Andrey Furmuzan	University of California, Davis
Jeffrey Ratje	University of Arizona
Tracy Hunter	University of California, Davis
Kaitlin Pennell	University of California, Davis
Irina Skiba	University of California, Davis, FOA Business Partners
Steve Lanterman	University of California, Davis
Gladis Lopez	University of California, Davis
Jennifer Keene	University of Washington
Olivia Yang	Washington State University
Joe Kline	Washington State University
Meri Bozinovski	University of California, San Diego
Rory Korpela	University of Colorado Boulder
Kristina Do-Vu	University of California, Davis
Stephanie Kelly	University of Colorado at Denver
Elizabeth Loesch	University of California, Davis
Michael Clune	University of California, San Francisco
Stephanie Metz	University of California, San Francisco
Ashley Carr	University of California Davis
Takiyah Beckett	University of Nevada, Las Vegas
Queen King	California State University, Bakersfield
Lisa Terry	University of California, Office of the President
Joemari Cedro	University of California, Berkeley
Mollie Holt	Washington State University
Connie Gamble	University of Nevada, Las Vegas - Real Estate Department
Cherie Garrity	University of Nevada, Las Vegas - Real Estate Department
Bridget Hahn	University of Nevada, Las Vegas - Real Estate Department
Brian Townsend	University of Nevada, Las Vegas - Real Estate Department
Kathleen Tagaca	University of Hawaii at Manoa
Nicole Sanderson	University of Washington
Luis Alvarez	University of California, Riverside
Annie Hoai Hooper	University of California, Riverside
Terri McDonald	University of California, Riverside
Carmen Rivera	University of California, Riverside
Laura Schulte	University of California, Riverside
Linda Moran	University of California, San Francisco
Marissa Gardner-Saraf	University of California, Berkeley
Janis Rutherford	University of Arizona
Lisa Frace	University of California, Davis
Linda McDermott	Washington State University

Session 1: *Strategy Formulation Under COVID – Survive and Thrive*

Dec. 2 2:00-3:30 pm PT
5:00-6:30 EST

Paul N. Friga, Ph.D.
Strategy Professor at UNC CH, Co-founder of ABC Insights and VP Strategy, HelioCampus

Ruth Johnston
Vice Chancellor, Strategic Chief Financial Officer, New Mexico State University

Description

Strategy is one of the most critical elements of any organization. The goal of strategic planning is create a strategy that successfully links resource allocations to support the intended strategic direction of the organization and achieve stated objectives. In periods of crisis, some leaders focus on freezing and cutting and neglect to stay focused on key priorities. Moves made during recessions will lead to greater gains coming out of tough economic times. The key is balance.

Learning Objectives

- Learn the content and process of good strategic planning, including scenario planning
- Observe best practice examples of strategy and tips for success – especially in crisis
- Explore first-hand examples of institutions balancing short and long term priorities

5 min	Introductions
30 min	Plenary Presentation
35 min	Breakouts
20 min	Report Outs

Key Readings

- https://kenaninstitute.unc.edu/kenan-insight/unc-is-preparing-for-the-worst-scenario-and-why-you-should-too/ - read the article and watch the video
- *The Hard Choices Presidents Will Have to Make (April, 2020)*
- *The Great Recession Was Bad for Higher Education. Coronavirus Could Be Worse (March, 2020)*
- "*Can You Say What Your Strategy Is?*"
- "*From Theory To Action: The Story of One Strategy*"
- "*How to Improve Your University During the COVID Crisis*"

Key Videos

- "*How To Write a Mission Statement That Doesn't Suck*" (https://www.youtube.com/watch?v=LJhG3HZ7b4o)
- "*Strategic Planning – How to Do It Right*" – Dr. Paul N. Friga; "*Strategic Planning – How to Do It Right*" (https://vimeo.com/showcase/paul-video and the password is "UNC2020")

Discussion topics

- Introductions and Overview

- **Plenary: Strategy Formulation Under COVID – Survive and Thrive**

  - Strategy Definitions and Frameworks

  - A Macro-Environmental Analysis of Higher Ed

  - Strategy Examples

- Breakouts

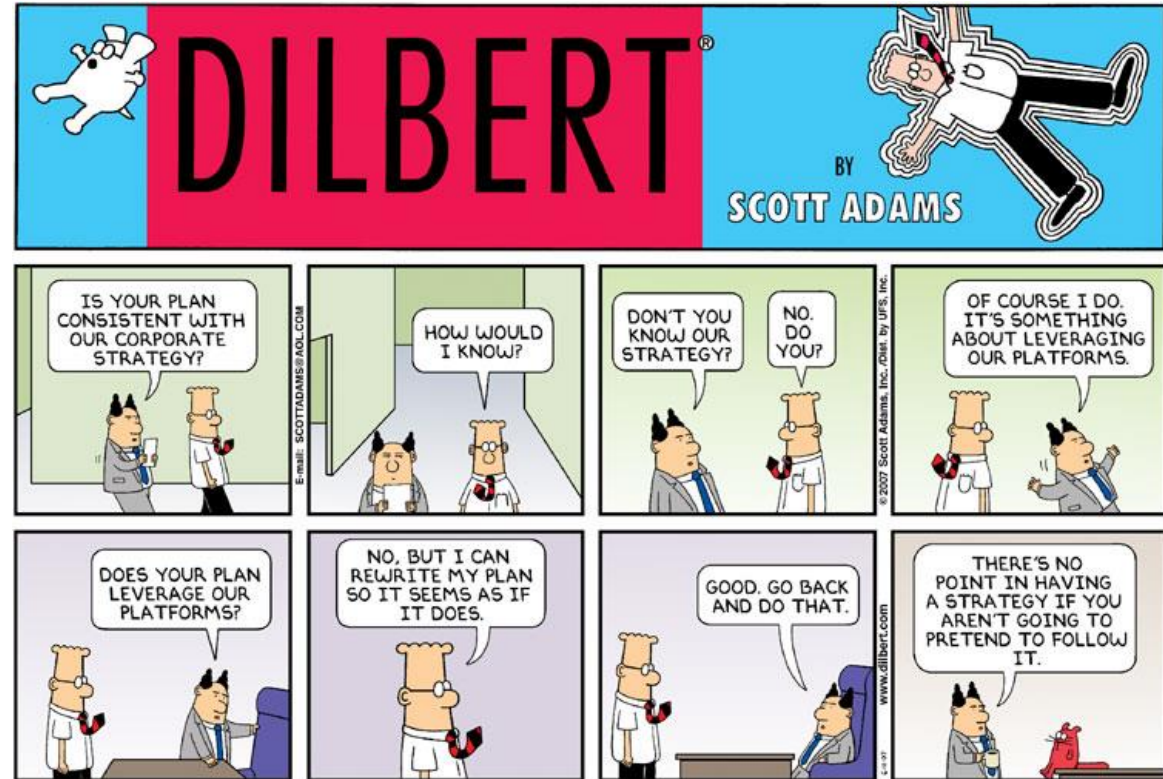- Report Outs

Discussion topics

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What is strategy?

Strategy

Noun.

An elaborate and systematic plan of action.

Paul's Four P's of Strategy: A Framework of Content

- Who are we?
- What do we offer that is unique?
- Where are we headed, exactly?

Position
Mission, Values & Vision

Priorities
Key Actions

- What is critical for success?
- What activities must we do (BHAGs)?
- What should we not do?

- How do we measure success?
- What controls should we implement?
- How is our return vs. competitors'?

Performance
Success Metrics

Payments
Budget

- How much do we have to spend?
- How should we allocate resources?
- What budget process should we use?

It is helpful to create core strategy statements

Mission Statement

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

Vision Statement

Statement describing what the firm 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)

Mission
Vision
Values

Priorities
Objectives
Initiatives
Actions

How do firms create strategies?

Crafting a Strategy

A 3 Step Process

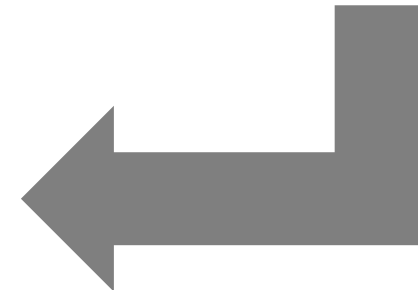External Analysis (Macro, Customers & Competitors)

Internal Analysis (People, Processes, & Technology)

Craft Strategy
(the Black Box)

- Positioning
- Priorities
- Payments
- Performance

There are different tools in the strategy process

Strategic Planning

Strategic Vision: sustainable competitive advantage

Strategic Tactics

Strategic Thinking
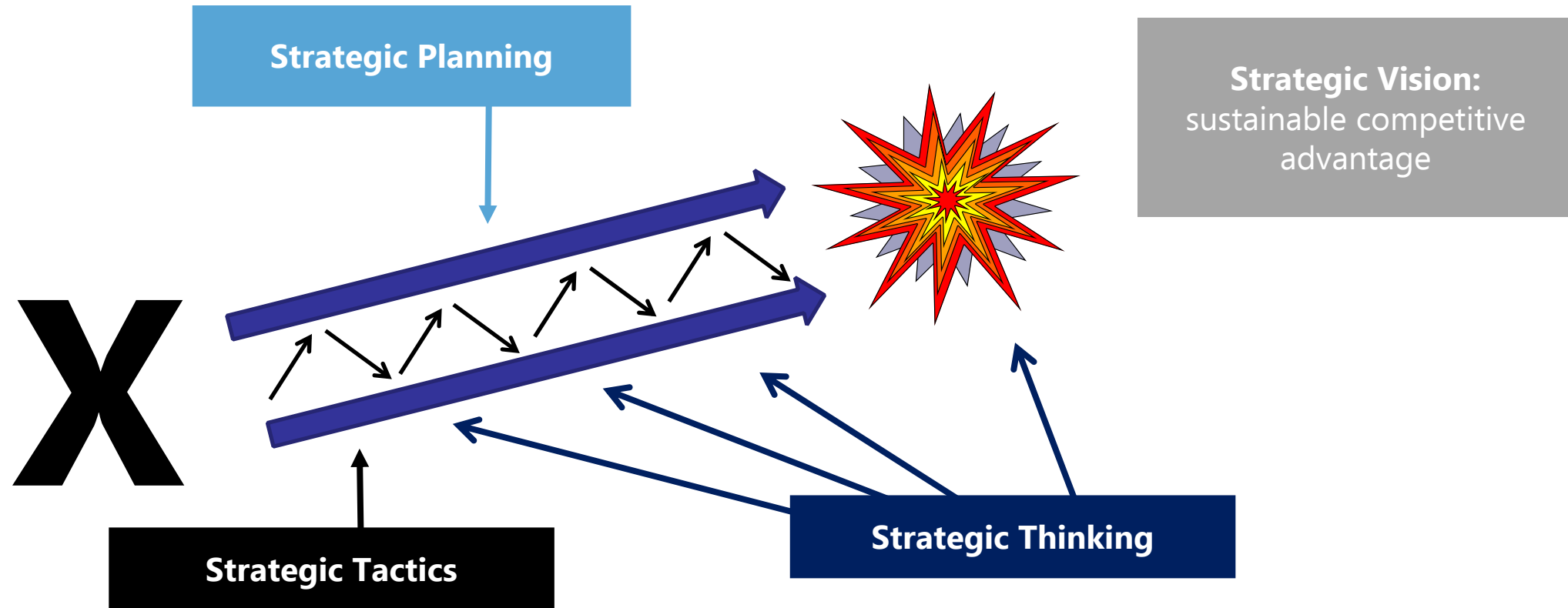
Strategy occurs on multiple levels

Business Strategy
How do we operate within the selected businesses? What products or services should our firm offer? How should our firm create those products or services? How should our firm take its products or services to the marketplace?
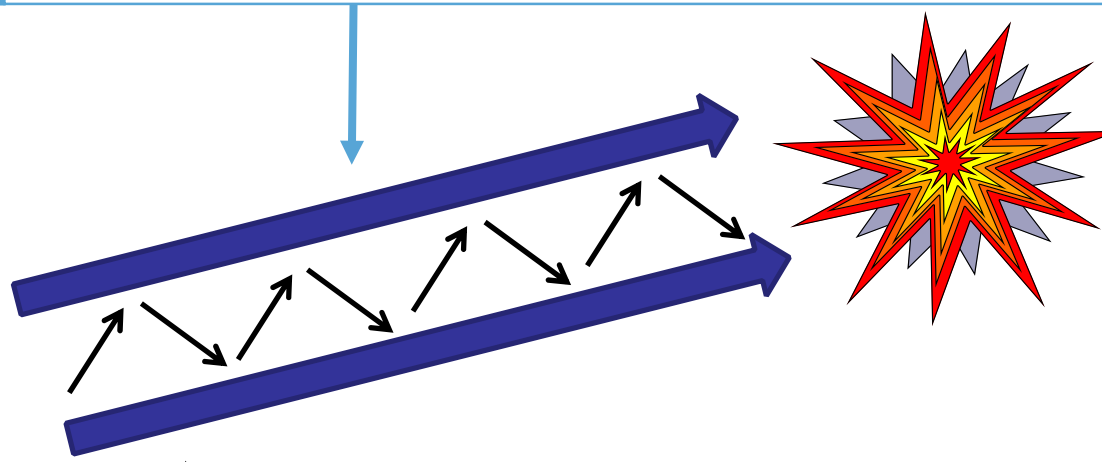
Corporate Strategy
In what businesses or areas should our firm compete? What should our firm's overall portfolio of businesses look like?

X

Functional Strategy
How should our firm operate within specific functional areas (e.g., marketing, R&D, production, finance, HR)?

The starting point of analysis is SWOT

	Strengths	Weaknesses
Internal Analysis		→
External Analysis	Opportunities	Threats →

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

The STEEP framework measures importance and impact of external environment

Economic
- Domestic & int'l growth cycle (e.g., recession)
- Inflation rates
- Unemployment rates
- Interest rates
- Currency fluctuations
- Domestic & Int'l wage rates
- Trade deficits

Political/Legal/ Governmental
- Int'l legislation (e.g., import/export laws)
- Domestic legislation (e.g., labor laws)
- Federal agencies (e.g., OSHA, EEOC, Trade agencies)
- Government involvement

Market/Competitive
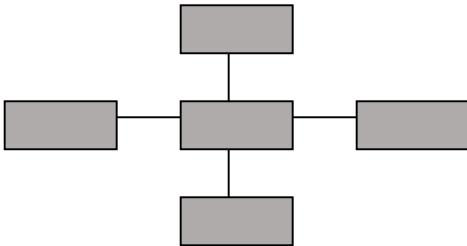
Technological
- Advances in consumer electronics technology
- Advances in computer technology
- Advances in automotive technology
- R&D and new product introductions

Social/ Demographic
- Domestic & int'l population shifts
- Speed of technology adoption among consumers
- Workforce demographics (e.g., diversity)
- Income distribution

Environmental/ Geographic
- International competitor locations
- Transportation costs
- Ecological issues – pollution, recycling, energy use, air/water quality, natural resources, & power sources

Importance:
Overall, how important is each factor?
(H M L)
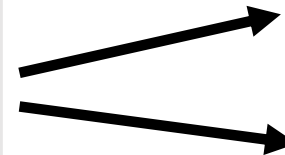
Identify the top 5
Issues - Implications

Impact:
Overall, does each factor have a positive, negative or neutral impact?
(+ - 0)

Scenario Planning at a high level

1. Understand the base line strategy and related assumptions

2. Review the external environment

3. Develop a list of key factors that may affect strategy

4. Prioritize the 2 most important factors

5. Develop 4 scenarios (with names) and display in a 2x2

6. Identify key strategic initiatives in each scenario

Scenario Planning Example – Automobiles in the 80s

High-priced

Engineer's challenge:
- Efficiency
- Protectionism

Green highways:
- Smaller cars

Non-traditional customer values

Inner-directed values

Long live Detroit:
- Muscle cars
- Brand

Foreign competition:
- Sportier cars
- Light trucks and vans

Low-priced
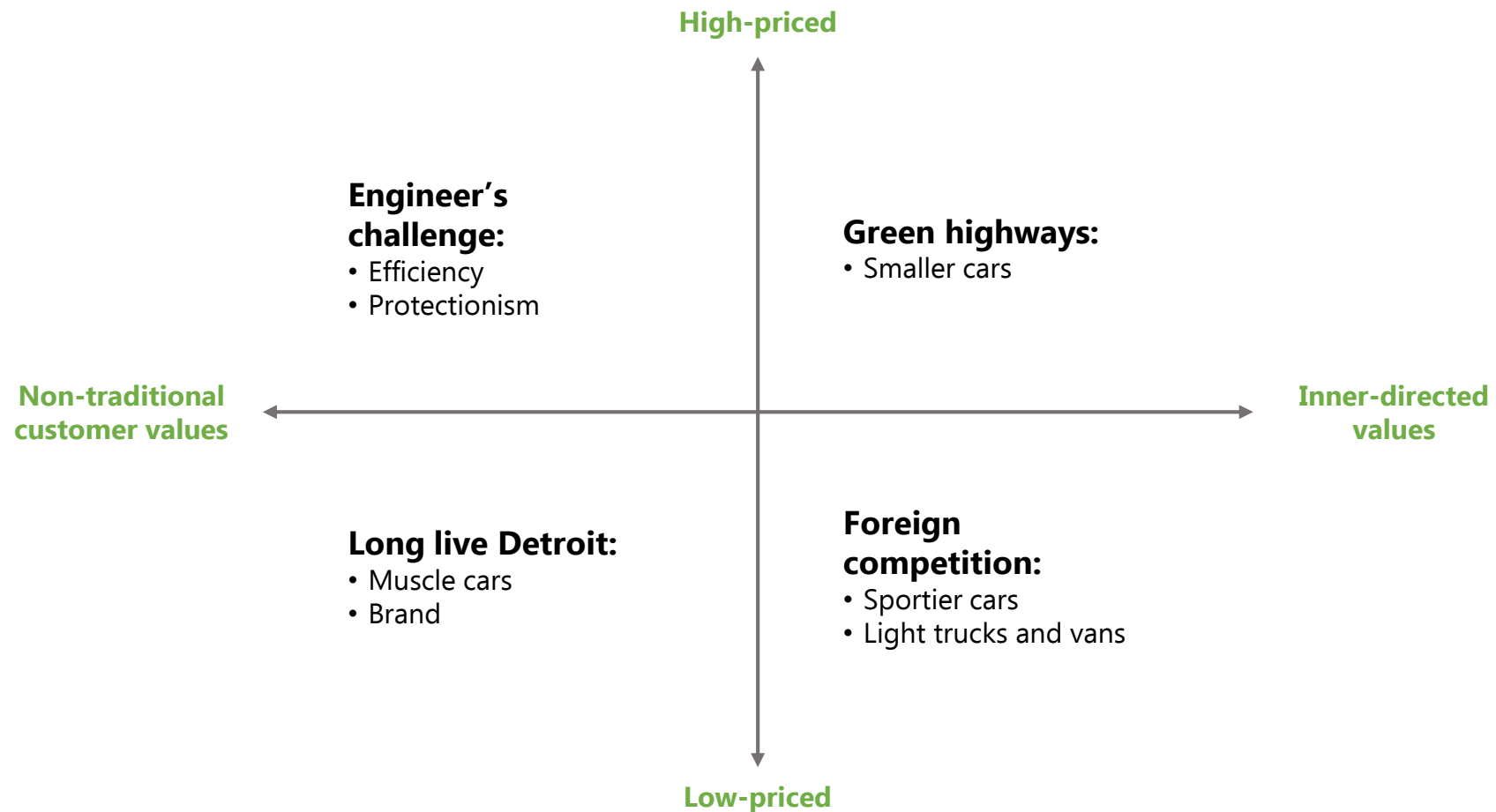
The different types of budgets – in general & higher ed

Four Budgeting Methods

Incremental	Activity Based	Value Proposition	Zero Based

National Association of College and University Business Officers
NACUBO

Budget Processes

- Overall processes
  - Incremental
  - Formula
  - Zero-based
  - Responsibility center
- Special purpose
  - Initiative-based
  - Performance-based

Aligning the strategies in an organization is straight-forward but also complex

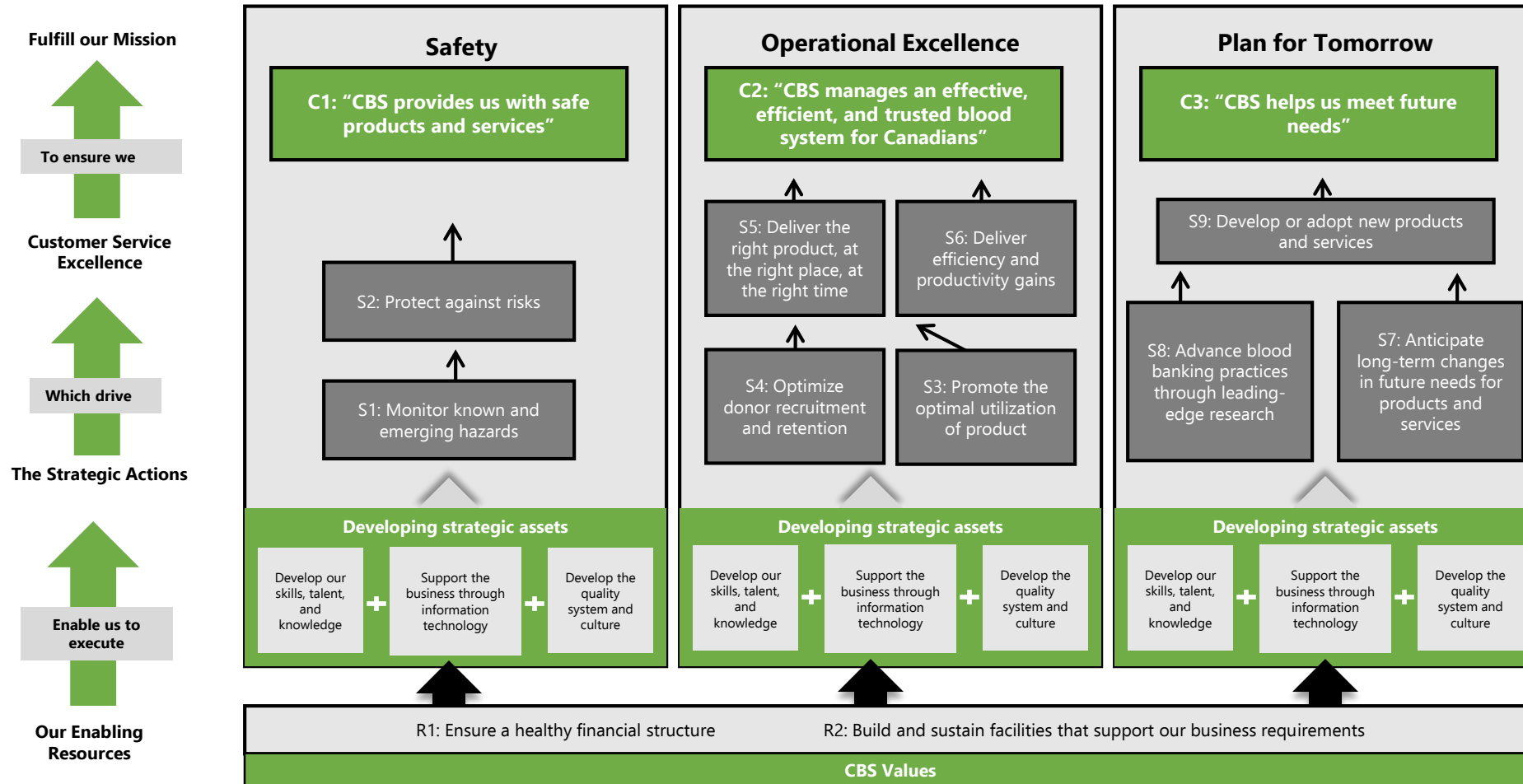| Alignment Process	Objective	Barriers	Enabling Tools
1. Align Business Units *How do we align business units to create corporate synergies?*	Cascade and embed corporate strategy into business unit strategies.	Business unit strategies typically are developed and approved independently, without the guidance of a corporate perspective; lack of integration across business units.	• Cascading of strategy maps to business units • Vertical and horizontal alignment
2. Align Support Units *How do we align support units to business units and corporate strategies?*	Ensure that each support unit has a strategy that enhances the performance of corporate and business unit strategies.	Support units treated as "discretionary expense centers," with goals to minimize costs rather than to support enterprise and business unit strategies.	• Service-level agreements • Support unit strategy maps and scorecards
3. Align Employees *How do we motivate employees to help us execute the strategy?*	All employees understand the strategy and are motivated to help successfully execute the strategy.	Most employees are not aware of or do not understand the strategy. Their objectives and incentives focus on local, tactical performance, not strategic objectives.	• Formal communication strategy • Employee objectives with clear line of sign to strategic objectives • Incentive and reward programs • Competency development

Example: Theme-based Strategy Map at Canadian Blood Services (CBS)

Fulfill our Mission

To ensure we

Customer Service Excellence

Which drive

The Strategic Actions

Enable us to execute

Our Enabling Resources

Safety

C1: "CBS provides us with safe products and services"

S2: Protect against risks

S1: Monitor known and emerging hazards

Developing strategic assets

Develop our skills, talent, and knowledge + Support the business through information technology + Develop the quality system and culture

Operational Excellence

C2: "CBS manages an effective, efficient, and trusted blood system for Canadians"

S5: Deliver the right product, at the right place, at the right time

S6: Deliver efficiency and productivity gains

S4: Optimize donor recruitment and retention

S3: Promote the optimal utilization of product

Developing strategic assets

Develop our skills, talent, and knowledge + Support the business through information technology + Develop the quality system and culture

Plan for Tomorrow

C3: "CBS helps us meet future needs"

S9: Develop or adopt new products and services

S8: Advance blood banking practices through leading-edge research

S7: Anticipate long-term changes in future needs for products and services

Developing strategic assets

Develop our skills, talent, and knowledge + Support the business through information technology + Develop the quality system and culture

R1: Ensure a healthy financial structure

R2: Build and sustain facilities that support our business requirements

CBS Values

The goal of alignment is connect the strategies both vertically and horizontally
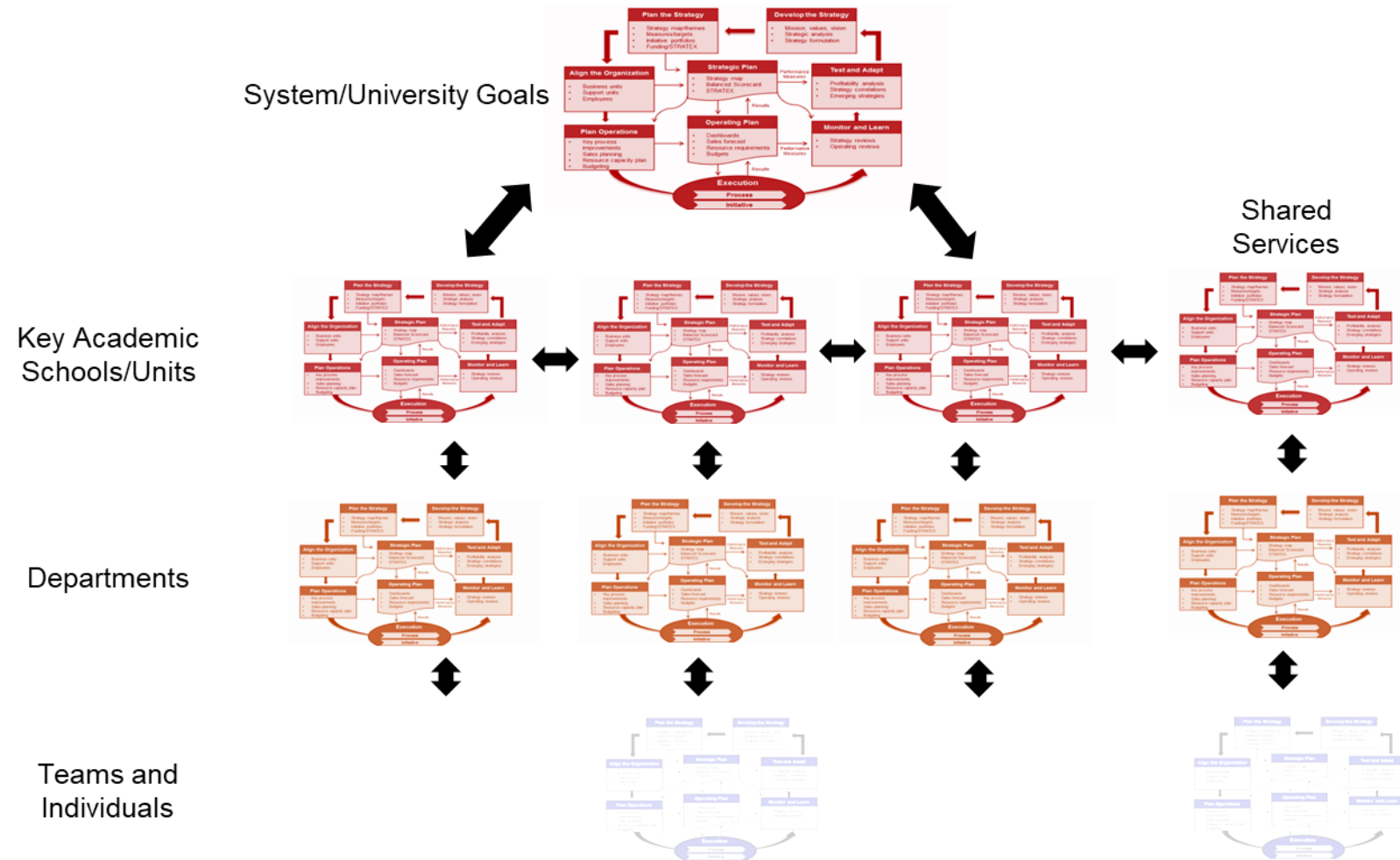
Discussion topics

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  - Strategy Definitions and Frameworks
  - **A Macro-Environmental Analysis of Higher Ed**
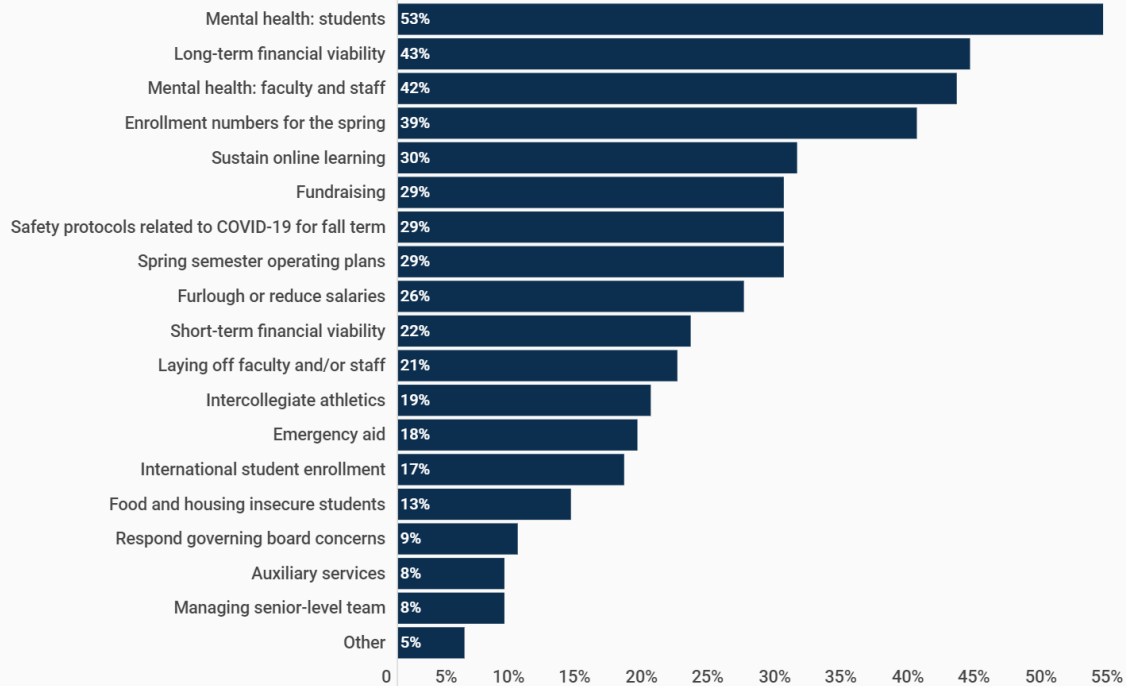 - Strategy Examples
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The macro environment suggests the need for change – The STEEP Framework

|	Theoretical Model	Applied to Higher Ed
SOCIAL/DEMOGRAPHIC	▪Domestic & int'l population shifts ▪Speed of technology adoption among consumers ▪Workforce demographics (e.g., diversity) ▪Income distribution	• Traditional tuition increases of 3+% unsustainable - $1.6T of student debt • 9 consecutive years of enrollment decline on a national basis and steeper declines forecasted • Adult students increasingly interested in higher ed
TECHNOLOGICAL	▪Advances in consumer electronics technology ▪Advances in computer technology ▪Advances in automotive technology ▪R&D and new product introductions	• Online education methodologies widely available • Increasing analytics capabilities for decision-making • Benchmarking data and platforms growing significantly (e.g. ABC Insights & HelioCampus)
ECONOMIC	▪Domestic & int'l growth cycle (e.g., recession) ▪Inflation rates ▪Unemployment rates ▪Interest rates ▪Currency fluctuations ▪Domestic & Int'l wage rates ▪Trade deficits	• Poor quality of earnings – 3 years of negative ratings by Moody's and S&P for higher ed • Currently in recessionary conditions (state support for higher ed at risk) • Over 1,200 colleges either at or approaching "not financially viable" status (DOE Financial Composite Scores)
ENVIRONMENTAL/ GEOGRAPHIC	▪International competitor locations ▪Transportation costs ▪Ecological issues – pollution, recycling, energy use, air/water quality, natural resources, & power sources	• More supply of brick-and-mortar colleges than student demand • Pressure for more sustainable energy use • Growth in international higher ed competitors
POLITICAL/LEGAL/ GOVERNMENTAL	▪Int'l legislation (e.g., import/export laws) ▪Domestic legislation (e.g., labor laws) ▪Federal agencies (e.g., OSHA, EEOC, Trade agencies) ▪Government involvement	• New White House administration • Likely stimulus package of some sort • Potential for increased governmental intervention

Campus leaders seem to recognize that it is time for real change

Figure 1. Most Pressing Issues Facing Presidents Due to COVID-19 in September

Issue	%
Mental health: students	53%
Long-term financial viability	43%
Mental health: faculty and staff	42%
Enrollment numbers for the spring	39%
Sustain online learning	30%
Fundraising	29%
Safety protocols related to COVID-19 for fall term	29%
Spring semester operating plans	29%
Furlough or reduce salaries	26%
Short-term financial viability	22%
Laying off faculty and/or staff	21%
Intercollegiate athletics	19%
Emergency aid	18%
International student enrollment	17%
Food and housing insecure students	13%
Respond governing board concerns	9%
Auxiliary services	8%
Managing senior-level team	8%
Other	5%

Pulse Point Survey of College and University Presidents on COVID-19: 2020 Fall Term Survey, American Council on Education, 2020.

InsideHigherEd Survey of Presidents
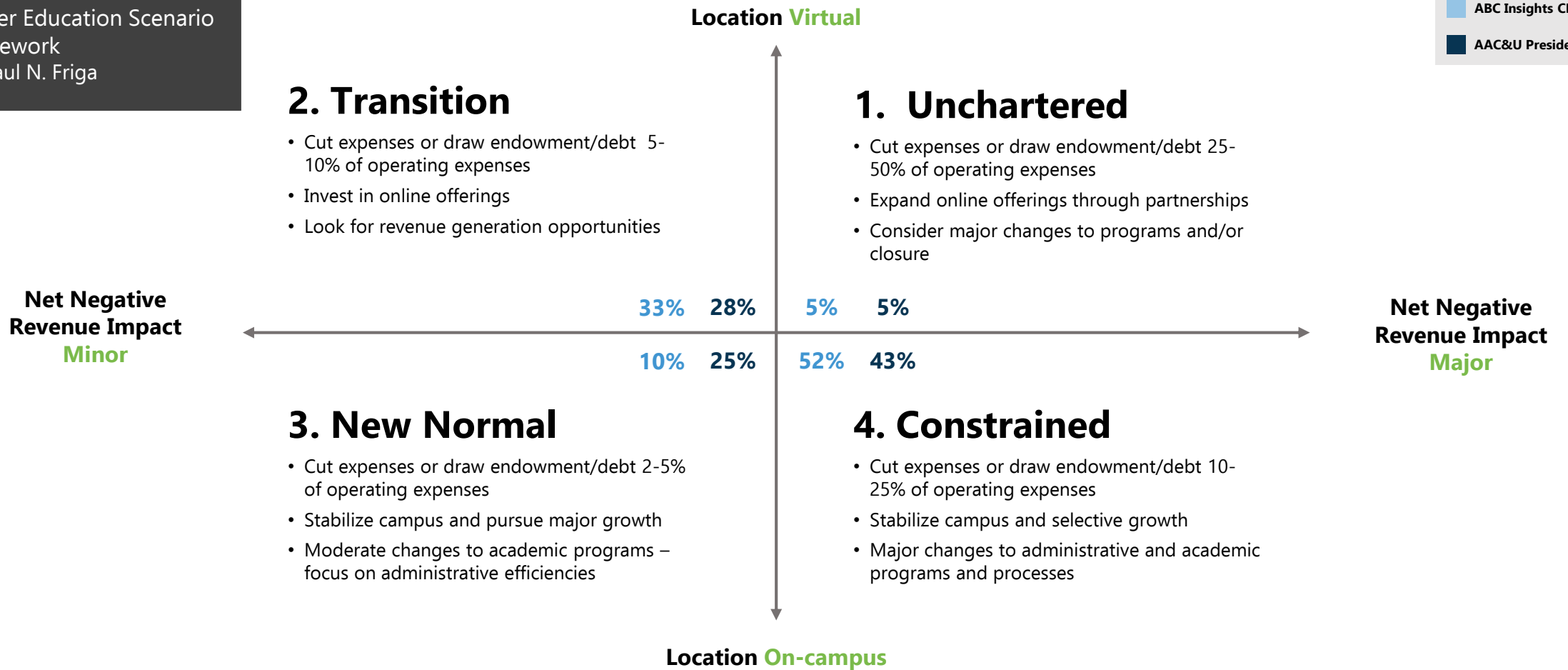How do you intend to use this period?

Make Transformative Changes	Reset for Growth	Return to Normal
50%	35%	11%
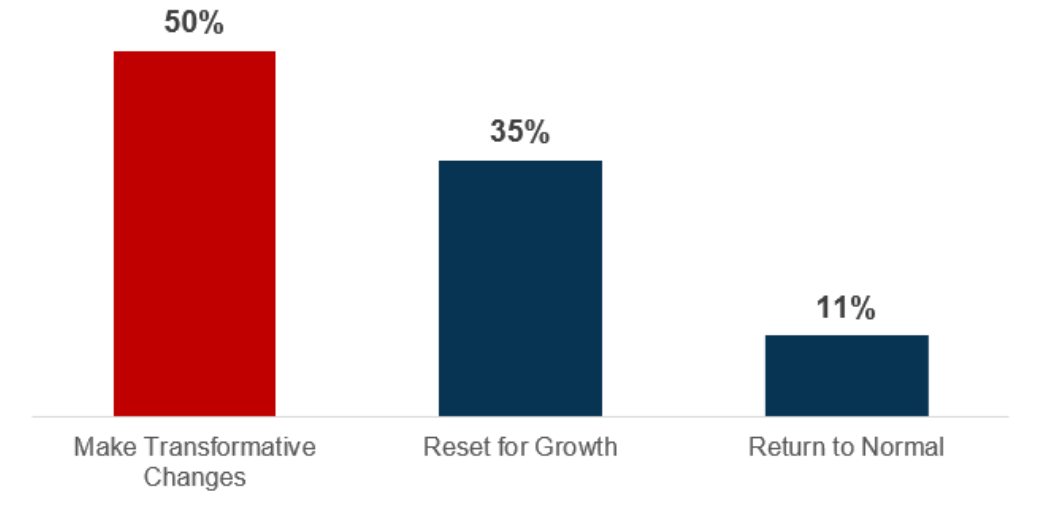
100% of University CFOs and 96% of Presidents are planning to "Reengineer Operational Processes"

Higher education is under a dramatic strategic period

Higher Education Scenario Framework
Dr. Paul N. Friga

Location Virtual

ABC Insights CFOs
AAC&U Presidents

2. Transition

- Cut expenses or draw endowment/debt 5-10% of operating expenses
- Invest in online offerings
- Look for revenue generation opportunities

1. Unchartered

- Cut expenses or draw endowment/debt 25-50% of operating expenses
- Expand online offerings through partnerships
- Consider major changes to programs and/or closure

Net Negative Revenue Impact Minor

Net Negative Revenue Impact Major

| | 33% | 28% | 5% | 5% |
| | 10% | 25% | 52% | 43% |

3. New Normal

- Cut expenses or draw endowment/debt 2-5% of operating expenses
- Stabilize campus and pursue major growth
- Moderate changes to academic programs – focus on administrative efficiencies

4. Constrained

- Cut expenses or draw endowment/debt 10-25% of operating expenses
- Stabilize campus and selective growth
- Major changes to administrative and academic programs and processes
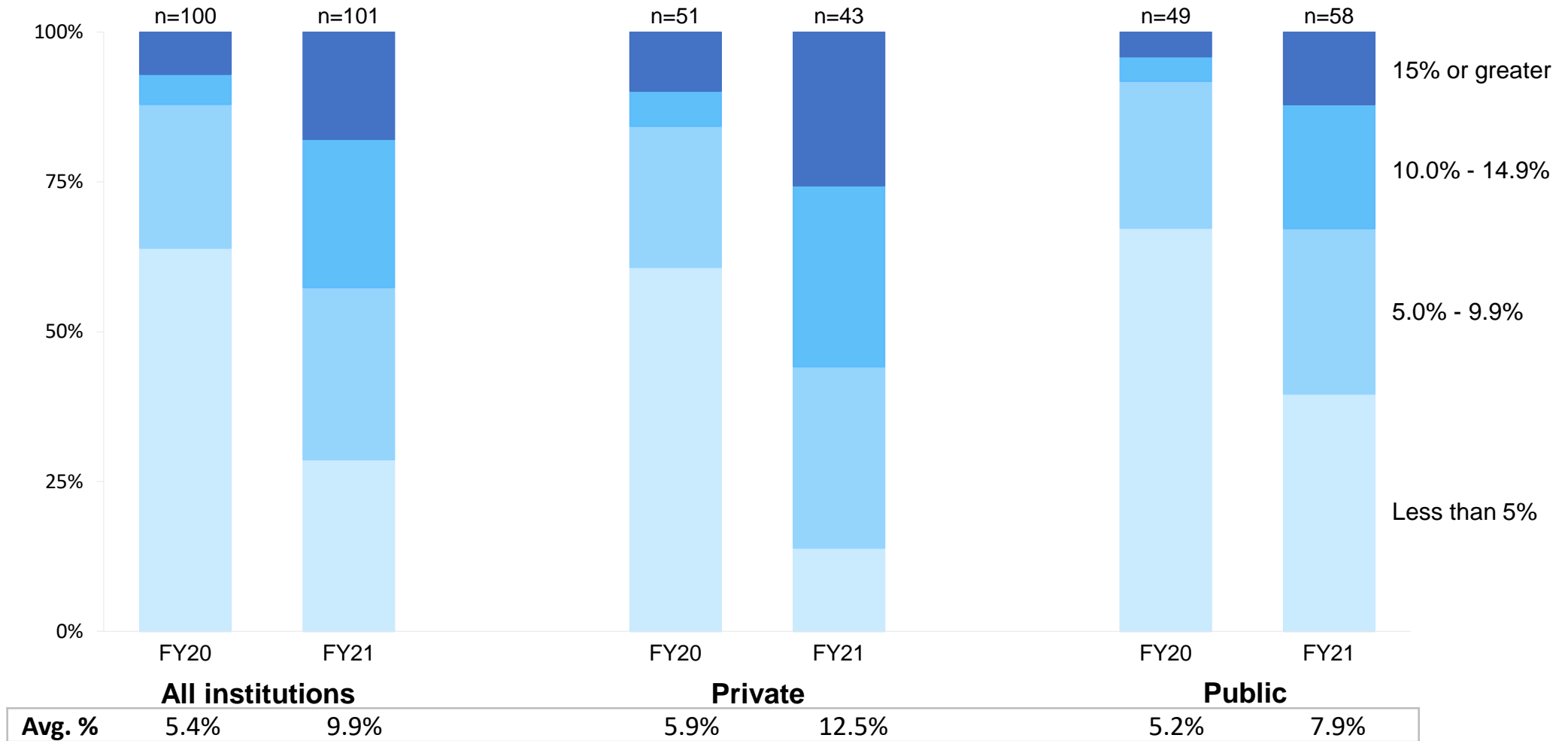
Location On-campus

Recent higher education trends: COVID-19
Higher education models are experiencing significant volatility that is creating new risks and opportunities

Estimated COVID-19-related revenue loss as a percentage of 2018 revenue by fiscal year,
FY2020 and FY2021, as of 10/16/2020

Legend:
- 15% or greater
- 10.0% - 14.9%
- 5.0% - 9.9%
- Less than 5%

	All institutions		Private		Public	
	FY20	FY21	FY20	FY21	FY20	FY21
Avg. %	5.4%	9.9%	5.9%	12.5%	5.2%	7.9%

n=100, n=101, n=51, n=43, n=49, n=58
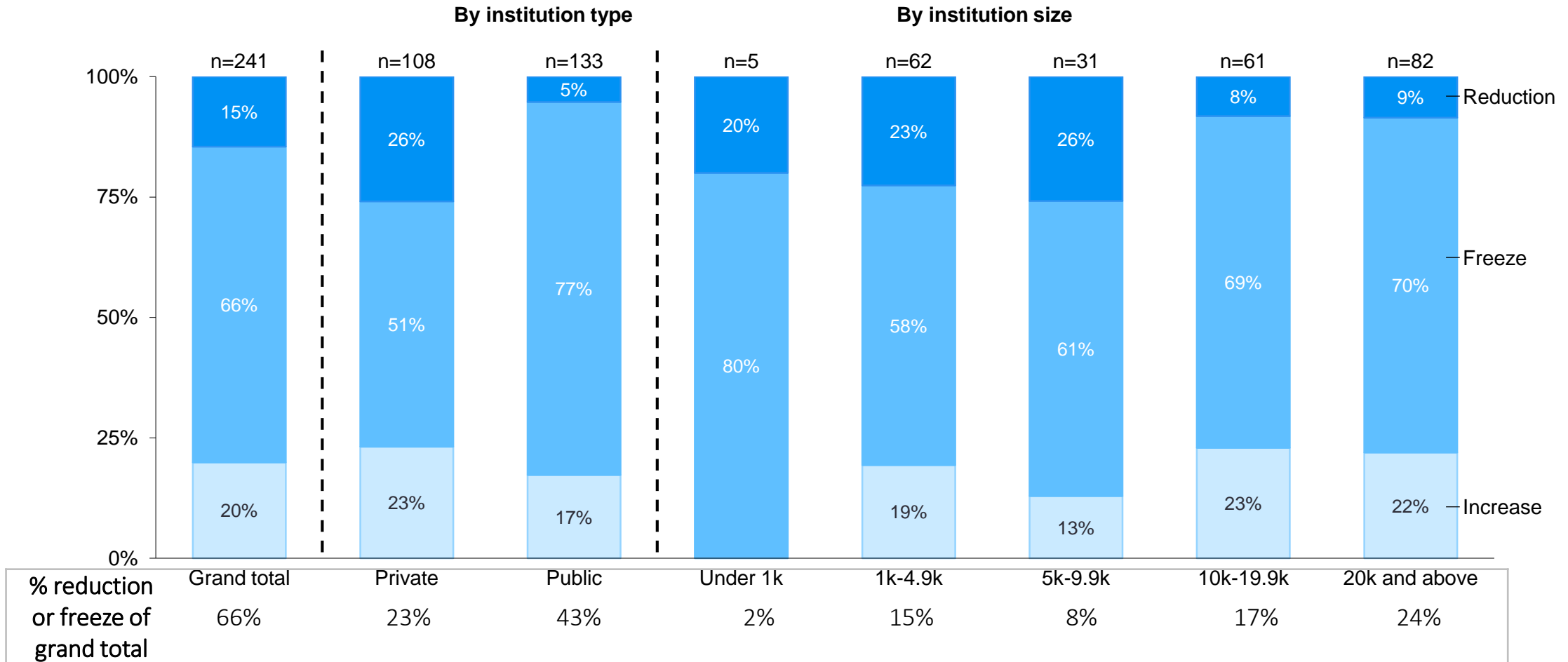
Recent higher education trends: COVID-19

Some institutions have begun to change pricing. Majority of institutions in the analysis set have announced tuition freezes or reductions

Published tuition changes for Fall 2020 of top 500 universities by school type and size,
As of 9/24/2020 (n=494)

	By institution type			By institution size				

Chart legend: Reduction / Freeze / Increase

By institution type:
- Grand total (n=241): Reduction 15%, Freeze 66%, Increase 20%
- Private (n=108): Reduction 26%, Freeze 51%, Increase 23%
- Public (n=133): Reduction 5%, Freeze 77%, Increase 17%

By institution size:
- Under 1k (n=5): Reduction 20%, Freeze 80%
- 1k-4.9k (n=62): Reduction 23%, Freeze 58%, Increase 19%
- 5k-9.9k (n=31): Reduction 26%, Freeze 61%, Increase 13%
- 10k-19.9k (n=61): Reduction 8%, Freeze 69%, Increase 23%
- 20k and above (n=82): Reduction 9%, Freeze 70%, Increase 22%

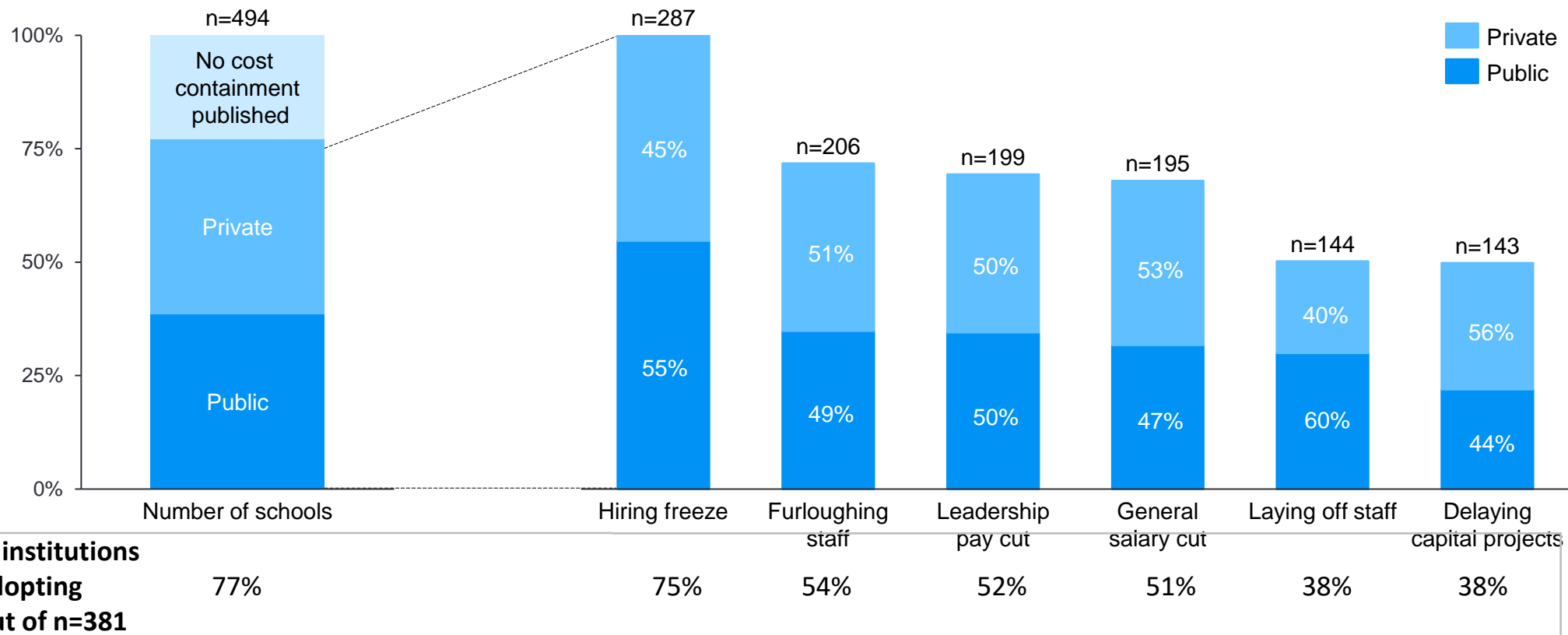| % reduction or freeze of grand total	Grand total	Private	Public	Under 1k	1k-4.9k	5k-9.9k	10k-19.9k	20k and above
	66%	23%	43%	2%	15%	8%	17%	24%

Recent higher education trends: potential impact of COVID-19
Institutions are also undertaking cost-containment efforts in hopes of offsetting COVID-19-related revenue losses

ABC INSIGHTS
A HelloCAMPUS COMPANY

Cost containment measures published by top universities,
As of 10/16/2020

Type of cost containment measure taken as response to COVID,
As of 10/16/2020 (n=381)

Private
Public

	Number of schools		Hiring freeze	Furloughing staff	Leadership pay cut	General salary cut	Laying off staff	Delaying capital projects
n=	494		287	206	199	195	144	143
% institutions adopting out of n=381	77%		75%	54%	52%	51%	38%	38%

Presidents and CFOs believe the impact of COVID-19 will be significant on their respective campuses

Expected Potential Decreases to Revenue in FY21

Legend:
- ABC Insights CFOs
- AAC&U Presidents

Category	ABC Insights CFOs	AAC&U Presidents
0-4.9%	10%	25%
5-9.9%	33%	28%
10-14.9%	29%	38%
15-19.9%	19%	5%
20-24.9%	5%	4%
25%+	5%	1%
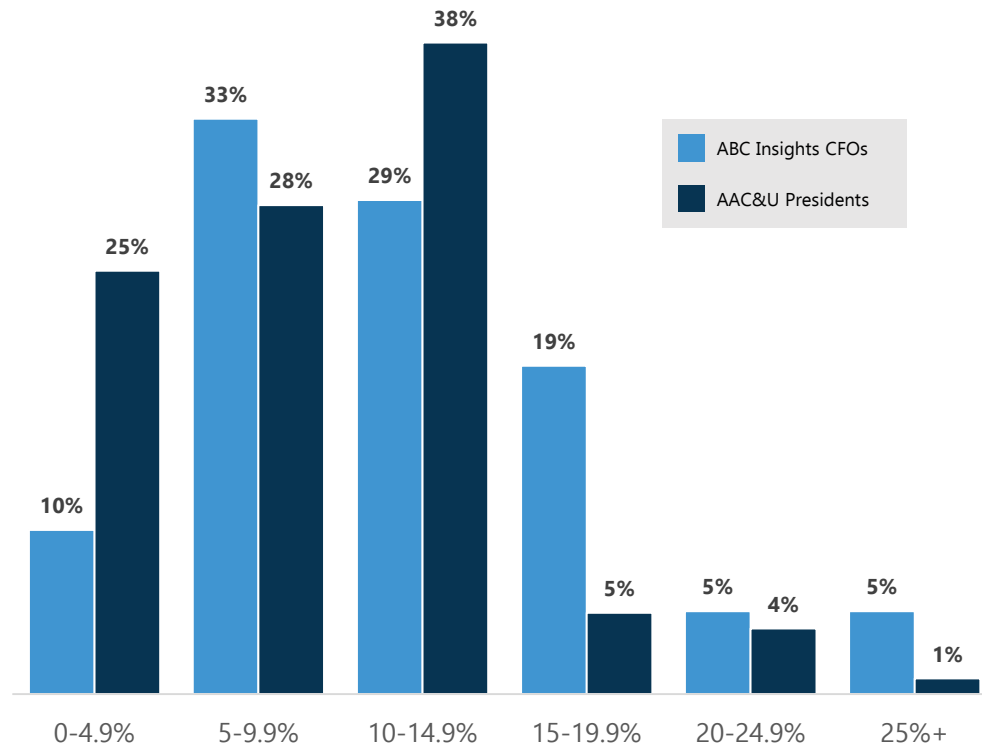
Presidents Say

"I worry about cuts in state and county funding. ... I worry that I won't have the workforce resources to help lead the economic recovery."

"Beyond the well-being of our students and staff, which comes first, I am worried about the lack of sufficient relief for higher education from state and federal governments."

"Sharply declining revenue due to loss of paying students and a new 'free college' program in our state."

"All income streams are under stress — tuition, development, endowment."

CFOs Say

"State subsidy will be reduced, auxiliary funds will be reduced due to lack of events, athletics impacted negatively."

"We are expecting 25% cuts in State support as well as enrollment impacts."

"Lost revenue is the main issue and the need to maintain physical infrastructure without revenue"
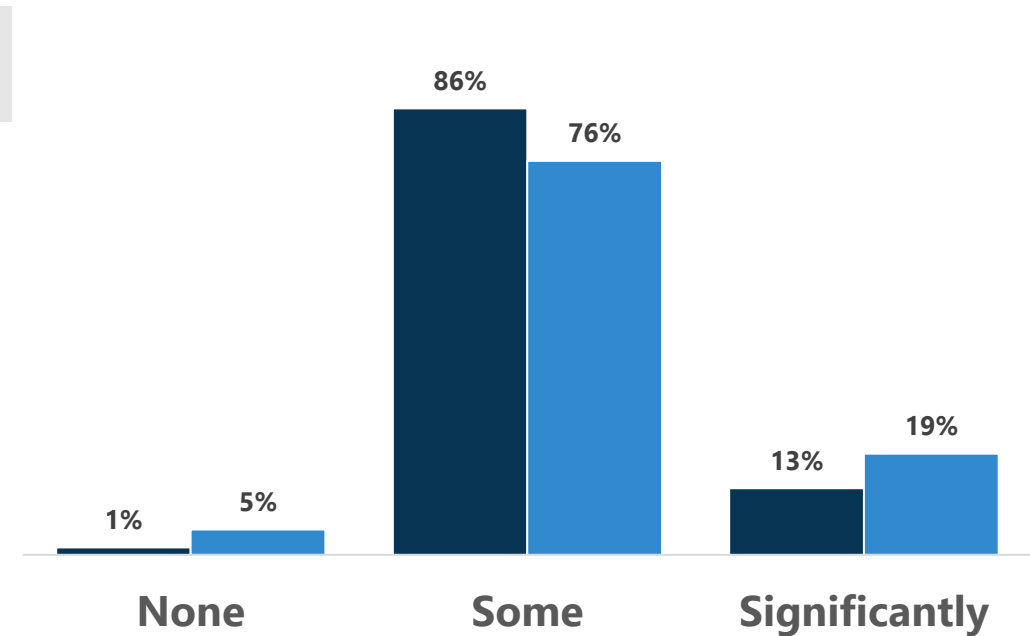
"Out of state revenues account for [a majority] of our revenue."

To survive this crisis, cuts will have to made in administration and academics

How Significantly Participants Anticipate Cutting **Academic** Programs in FY21
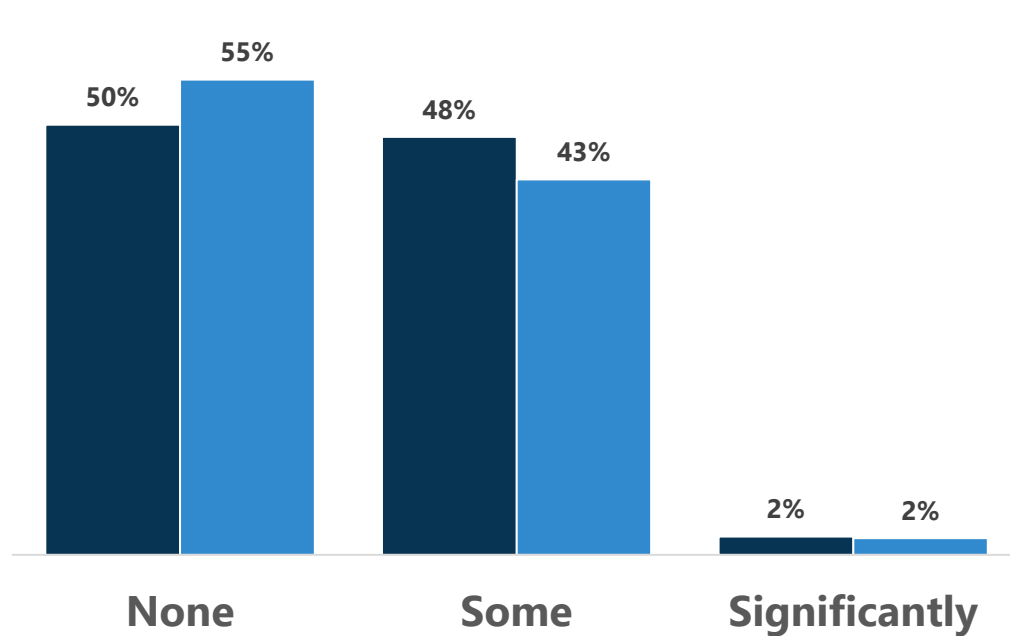
How Significantly Participants Anticipate Cutting **Administrative** Costs in FY21

April
July

Academic Programs:
- None: April 50%, July 55%
- Some: April 48%, July 43%
- Significantly: April 2%, July 2%

Administrative Costs:
- None: April 1%, July 5%
- Some: April 86%, July 76%
- Significantly: April 13%, July 19%

We created a Consortium, ABC Insights, to help universities become more efficient and effective

57+ Members in the US and Canada

Small Institutions (FTEs < 2,000)

Keene State College · Plymouth State University · Colorado School of Mines · Bucknell University · Loyola University Maryland · Tennessee Tech · Northern Kentucky University · University of St. Thomas · Missouri S&T · UMSL · M

Medium Institutions (FTEs 2,000 – 4,000)

John Jay · BGSU Bowling Green State University · Wright State University · WKU · North Dakota · NM State University · Grand Valley State University · FAU Florida Atlantic University · Boise State University · University of Toledo · Miami University · UT Dallas · The University of Southern Mississippi · UMKC

Large Institutions (FTEs > 4,000)

Kent State University · University of Delaware · Ohio University · Kansas State University · Texas Tech University · University of Oregon · University at Buffalo · University of Houston · University of Massachusetts Amherst · Oregon State University · Auburn University · The University of Alabama · Cincinnati · University of Colorado Boulder · Virginia Tech · Arizona State University · Temple University · University of Kansas · University of Missouri · Illinois · The University of North Carolina at Chapel Hill · The University of Utah · UC Davis University of California · The University of Arizona · UF University of Florida · Texas · USC University of Southern California · Wisconsin · Rutgers · The Ohio State University · McGill · UNLV

Campuses will need to make operations more efficient and effective

ABC Insights/HelioCampus Transformation Roadmap

Optimize Administrative Spend	Increase Academic Program Returns	Grow Resources

Examples of Strategic Initiatives For Change

• Consolidate Purchasing • Cut Staff • Re-engineer Processes • Outsource • Centralize/Shared Services • Modernize Technologies • Merge Multiple Locations • Increase Spans of Control • Decrease Energy Use	• Sunset Programs • Expand 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	• 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.) • Grow Enrollments

Source: www.abc-insights.com ; www.heliocampus.com

At ABC Insights, we help universities identify efficiency opportunities via benchmarking – here are the highlights

Efficiency Opportunity Per University
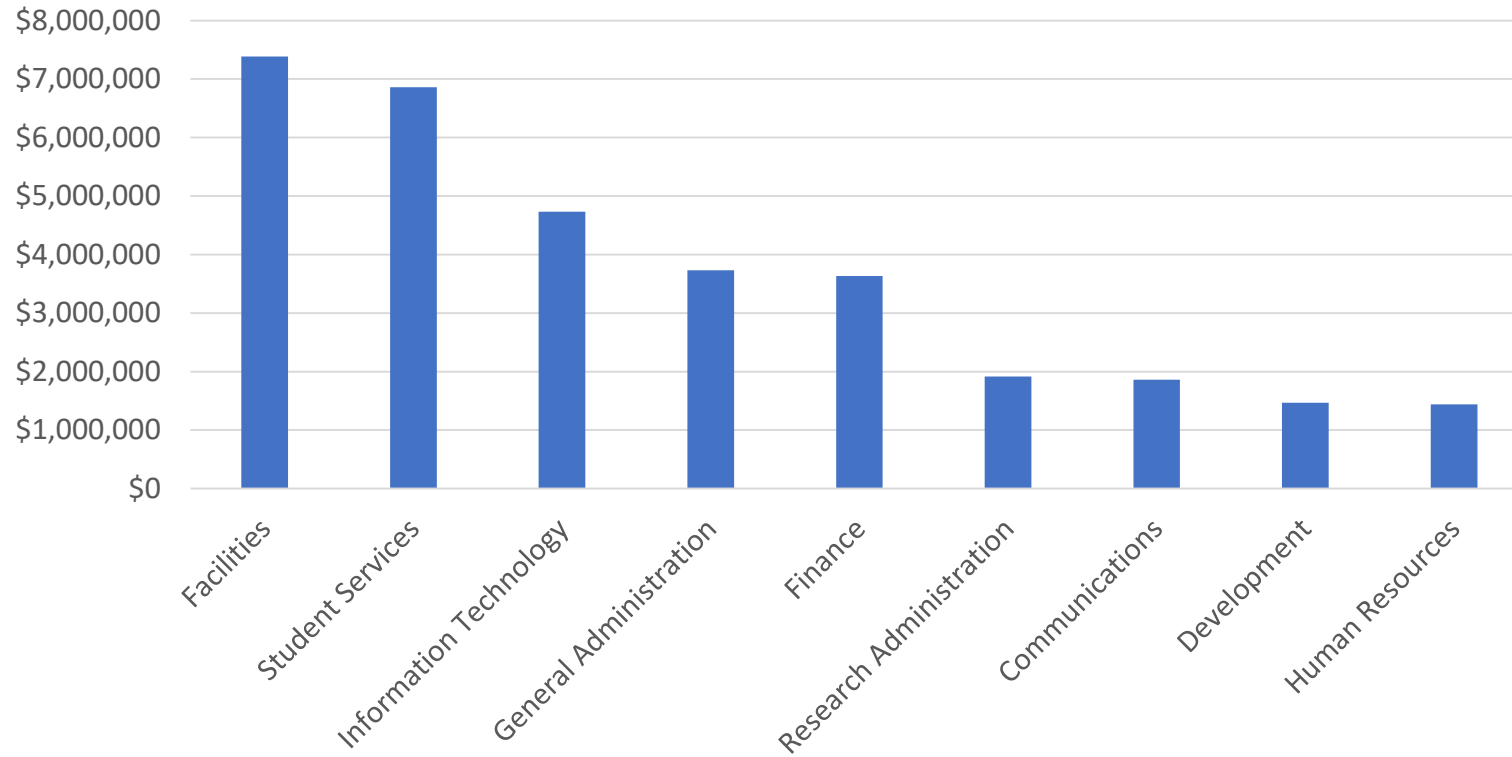
$33M Total Efficiency Opportunity Per University

ABC Insights Methodology:
Analyze the employee FTE levels by the 9 administrative activity and 55 sub-activity categories and then compare to benchmark average. Then cost out the opportunity at the FTE salary amount at that activity/sub-activity.

Here is where our Members are finding the biggest efficiency opportunities (central and decentral)

Many members are exploring decentral Dept Support efficiency opportunities

4 of the top 8 opportunities across all universities are in Facilities

It may be risky to decrease Development investments in tough times

Ed Tech investments are critical in remote learning environments

SAM Sub-Activity	Efficiency Opportunity Ranking*				
	Overall	Large	Mid-Size High Research	Mid-Size	Small
General Admin-Dept Support	1	1	1	1	3
IT-Application Development	2	2	6	3	5
Facilities-Maintenance	3	3	7	9	17
Facilities-Custodial Services	4	7	3	4	1
IT-Infrastructure & Operations	5	4	4	12	10
Facilities-Public Safety	6	8	2	8	15
Finance-General Accounting	7	12	13	6	6
Facilities-Other (e.g., inventory, research facility management, etc)	8	10	9	10	28
Development-Fundraising	9	11	11	11	8
Communications-Marketing	10	6	15	14	14
Facilities-Energy & Utilities	11	33	5	2	25
Communications-Other (e.g., printing, graphic design, etc)	12	14	10	13	11
Research Administration-Research Compliance	13	5	27	39	36
Finance-Budget & Financial Planning	14	16	25	16	7
IT-Educational Technologies	15	15	14	20	14
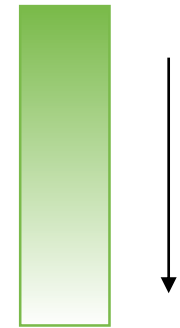
* Ranking based on total opportunity dollar amounts.

Note: Top 15 SAM-sub-activities with highest ranked opportunities (total dollar amounts) across all members shown out of 55 total sub-activities. Dining Services was excluded from this analysis.

Source: **ABC Insights**® FY17-FY19 data, N=40 universities

Paul's "Looking Glass" into potential changes in higher ed

Dimension	Current	Future
Tuition	Medium - High	Free - Low
Differentiation of Providers	Low	High
Accessibility	Low	High
Online Education	Low	High
Partnerships with Employers	Medium	High
Virtual Campus Services	Low	High
Inter-University Collaboration	Low	Medium
Relevance	Low	High
Faculty	Single-University	Multi-University / Free Agent
Students	18 - 24-Year Old	18 - 80-Year Old
National Universities	Few	Many
Credentials	2 & 4-Year Degrees	Degrees + Badges + Certificates

Source: Dr. Paul N. Friga

Discussion topics

- Introductions and Overview

- **Plenary: Strategy Formulation Under COVID – Survive and Thrive**

  - Strategy Definitions and Frameworks

  - A Macro-Environmental Analysis of Higher Ed

  - **Strategy Examples**

- Breakouts

- Report Outs

Arizona State – "The New American University"

ASU Charter

ASU is a comprehensive **public research university**, measured not by whom it excludes, but by **whom it includes** and how they **succeed**; advancing **research and discovery** of public value; and assuming **fundamental responsibility** for the economic, social, cultural and overall health of the **communities** it serves.

Arizona State University (ASU) has become the foundational model for the **New American University,** a new paradigm for the public research university that transforms higher education. ASU is committed to **excellence, access and impact** in everything that it does.

No.1 university for innovation (ahead of Stanford and MIT)
— US News & World Report (2016, 2017, 2018, 2019)

Top 1 percent of the world's most prestigious universities
— Times Higher Education

A top producer of Fulbright U.S. students
— The Institute for International Education

A top "Best College Value" in public higher education
— Kiplinger Personal Finance

Top public university of choice for international students
— The Institute for International Education

Mission & Goals

Demonstrate leadership in academic excellence and accessibility

- Maintain the fundamental principle of accessibility to all students qualified to study at a research university.
- Maintain university accessibility to match Arizona's socioeconomic diversity, with undifferentiated outcomes for success.
- Improve freshman persistence to **greater than 90 percent.**
- Enhance university graduation rate to **greater than 85 percent** and more than 32,000 graduates.
- Enhance quality while reducing the cost of a degree.
- Enroll **100,000** online and distance-education degree-seeking students.
- Enhance measured student development and individual student learning to national leadership levels.
- Engage all learners on all levels.

Establish national standing in academic quality and impact of colleges and schools in every field

- Attain national standing in academic quality for each college and school (top 5 percent).
- Attain national standing in the learning value added to our graduates in each college and school.
- Become the leading university academically (faculty, discovery, research, creativity) in at least one department or school within each college and school.

Establish ASU as a leading global center for interdisciplinary research, discovery and development by 2025

- Become the leading American center for discovery and scholarship in the integrated social sciences and comprehensive arts and sciences.
- Enhance research competitiveness to more than **$815 million** in annual research expenditures.
- Transform regional economic competitiveness through research and discovery and value-added programs.
- Become a leading American center for innovation and entrepreneurship at all levels.

Enhance our local impact and social embeddedness

- Strengthen Arizona's interactive network of teaching, learning and discovery resources to reflect the scope of ASU's comprehensive knowledge enterprise.
- Co-develop solutions to the critical social, technical, cultural and environmental issues facing 21st-century Arizona.
- Meet the needs of 21st-century learners through the universal learner initiative by increasing individual success through personalized learning pathways and promoting adaptability to all accelerated social-technical changes.

Eight **design aspirations** guide ASU's ongoing evolution as a **New American University**. ASU integrates these institutional objectives in innovative ways to demonstrate excellence, access and impact.

Leverage Our Place
ASU embraces its cultural, socioeconomic and physical setting.

Transform Society
ASU catalyzes social change by being connected to social needs.

Value Entrepreneurship
ASU uses its knowledge and encourages innovation.

Conduct Use-Inspired Research
ASU research has purpose and impact.

Enable Student Success
ASU is committed to the success of each unique student.

Fuse Intellectual Disciplines
ASU creates knowledge by transcending academic disciplines.

Be Socially Embedded
ASU connects with communities through mutually beneficial partnerships.

Engage Globally
ASU engages with people and issues locally, nationally and internationally.

Learn more: **president.asu.edu**
Twitter: **@asupresoffice**

Revised 2019

Start at the top with the enterprise level mission and priorities – The UNC System

Case Example: UNC Higher Education System

UNC's Mission: It encompasses the 17 diverse constituent institutions and other educational, research, and public service organizations. Each shares in the overall mission of the University. That mission is to discover, create, transmit, and apply knowledge to address the needs of individuals and society.

ACCESS

The UNC system must continue its proud heritage of access and student diversity.

AFFORDABILITY AND EFFICIENCY

Ensure a UNC education is within the financial means of all in the state.

STUDENT SUCCESS

Increase degree attainment and ensure value and relevance for students.

ECONOMIC IMPACT AND COMMUNITY ENGAGEMENT

Deepening partnerships that strengthen local communities and the state's economy.

EXCELLENT AND DIVERSE INSTITUTIONS

Help institutions achieve excellence within individual missions.

Then key objectives are set for all 17 campuses

ACCESS
- Increase Low-Income Enrollment
- Increase Completions by Low-Income Students
- Increase Rural Enrollment
- Increase Completions by Rural Students
- Improve Transition from K-12 to College

AFFORDABILITY & EFFICIENCY
- Increase 5-Year Graduation Rate
- Increase Undergraduate Degree Efficiency
- Close Achievement Gaps
- Implement a Survey of Current Students and Alumni

STUDENT SUCCESS
- Commit to Affordable Tuition
- Increase Operational and Financial Flexibility

ECONOMIC IMPACT & COMMUNITY ENGAGEMENT
- Increase Critical Workforce Credentials
- Increase Research Productivity
- Increase Investment in Strengthening North Carolina Communities

EXCELLENT & DIVERSE INSTITUTIONS
- Identify Academic 'Areas of Distinction'
- Focus on Human Capital

And then each campus sets its own specific goals and initiatives

This also allows for differentiation at the unit level

University	Distinct Area 1	Distinct Area 2
Appalachian State University	Envisioning a Just and Sustainable Future	Global Engagement: Education Abroad
East Carolina University	Cultural Champion	Social Mobility
Elizabeth City State University	Aviation Science Program	Student Success
Fayetteville State University	Facilitating Higher Education Attainment by Military-Affiliated Students	High Quality and Affordable Online Education
North Carolina A&T University	Minority Engineer Production	COBE Accountants Production
North Carolina Central University	Jazz Studies	Intellectual Property Legal Education
North Carolina School of Science and Math	Equity of Access for High School Students Statewide	Increasing Participation in Research
North Carolina State University	Lab to Market Innovation – Partnerships with the Private Sector	Engineering and Agriculture, Our Land-Grant Foundation
University of North Carolina at Asheville	High Impact Practices in Liberal Arts Education	Co-curricular Learning Experiences
University of North Carolina at Chapel Hill	**Creating Scientists: Learning by Connecting, Doing, and Making**	**Undergraduate Business Education**
University of North Carolina at Charlotte	Data Science Initiative	Community Engagement
University of North Carolina at Greensboro	Health and Wellness	Visual and Performing Arts
University of North Carolina at Pembroke	Regional Health	Regional Economic Development
University of North Carolina at Wilmington	UNCW and the Marine Sciences	New Academic Programs Serving Regional Needs
University of North Carolina School of the Arts	Expand and Enhance Filmmaking Programs	Increase AP Participation
Western Carolina University	Cultural and Environmental Immersion	Service and Outreach
Winston-Salem State University	Signature Liberal Education Experience	Signature Graduate and Professional Programs

Example: UNC School of Nursing

Mission
Carolina Nursing

Distinctly empowered to advance health for all

Carolina Nursing – Students, faculty, staff, and alumni generating, disseminating and translating knowledge
Distinctly Empowered – Creating trusted leaders who purposefully engage with individuals, health systems, communities and policies
Advance Health – Education, Research, Practice, and Service across the lifespan
For All – Every patient, family, provider, and community locally and globally

Vision

"First in Nursing"
The world's leading School of Nursing for the public

Values

"I-LEAD"
Integrity – Respect and trust in all actions
Leadership – Inspire, advocate, empower, and influence
Excellence – Unlock potential to transcend expectations
Agility – Innovate for the changing demands in education and healthcare
Diversity – Broaden perspectives, embrace open attitudes, and enhance inclusivity

Priorities

Culture – *Foster an inclusive environment of respect and civility and embrace decisions with a strategic mindset*

Infrastructure – *Upgrade facilities and integrate technologies to exceed current and future demands*

Innovation – *Transform curriculum, forge new pathways, and advance research and scholarship*

Priority 1 – UNC School of Nursing

Priority #1: *Foster an inclusive environment of respect and civility and embrace decisions with a strategic mindset*

A **Build a diverse, dedicated community**

- Encourage, reward, and celebrate **collaborative** achievements
- Reflect those we serve through **increased diversity**
- Cultivate meaningful **relationships** among community members
- Promote engagement in and enthusiasm for **our shared mission**

B **Communicate and facilitate clear decision-making**

- Clarify **decision-making** boundaries and levels of responsibility
- Align decision-making authorities with **organizational strategy**
- **Empower** individuals to make decisions to the fullest scope of their responsibility

Priority 2 – UNC School of Nursing

Priority #2: *Upgrade facilities and integrate technologies to exceed current and future demands*

A **Generate resources and develop plans to upgrade facilities**

- Raise at least **$50 million** for renovations
- Design an environment that encourages **innovation and collaboration**
- Build **world-class** facilities with leading technology

B **Advance technology to optimize operations and outcomes**

- Promote and expand **cutting-edge** learning opportunities and platforms
- Create processes to achieve and sustain technological **progress**
- Engage partners in campus **collaborative** opportunities

Priority 3 – School of Nursing

Priority #3: *Transform curriculum, forge new pathways, and advance research and scholarship*

A **Research: Achieve excellence and distinction in research that optimizes health and resilience locally and globally**

- Renew and advance the research **infrastructure**
- Increase research-active faculty and students to support **nurse-led team science**
- Focus on research with high scientific, social and positive cultural **impact**

B **Education: Create and advance high impact educational programs and a dynamic intellectual community**

- Create an innovative and rigorous **curriculum** across all academic programs
- Realize new instructional **modalities** (e.g. online, simulation, global, etc.)
- Develop new **clinical** placements and experiences to meet student and community needs

C **Practice: Shape current and future care and care delivery**

- Incentivize practice **contributions** to education and research innovation
- **Partner** to develop new models of intra- and inter-professional care delivery
- Translate nursing knowledge into practical **evidence-based** application in practice and policy

D **Service: Increase service commitment to external community**

- Develop and demonstrate model service programs to **NC rural** communities and underserved populations
- Design and implement pacesetter **community-engaged** scholarship and education to improve the health of the public
- **Inspire, innovate, and influence** advancement of nursing through increased service to professional, community

And don't forget your metrics! – UNC School of Nursing

Element	Description	Metrics
Priority 1	Attract and retain the very best **people i**n a collaborative environment	# of new faculty Measure of quality of new faculty % retention of current faculty Net Promoter Score Denison organizational culture survey Work-life survey % underrepresented minority growth
Priority 2	Revolutionize **curriculum** and **operations**	Net Promoter Score National recognition for curriculum change (i.e. GIES Award) % of courses with interdisciplinary faculty # students in interdisciplinary courses % of on-time graduates 3, 5, and 10 year alumni outcomes Student learning outcomes

Priority 3	Adopt an **entrepreneurial** mindset	$ raised from giving
		$ raised from new revenue
		# of new IP (products, processes, technologies, etc.)
		# of resources dedicated to innovation
		# of new partnerships
		# of startups
		# of faculty participating in innovation programs
		# of students involved in service and global programs
		ROI of programs
		% of strategic objectives and initiatives overall

Examples – Strategy Maps based off of the Balanced Scorecard

SCHOOL OF NURSING, SEATTLE CAMPUS- STRATEGY MAP 2012-2015
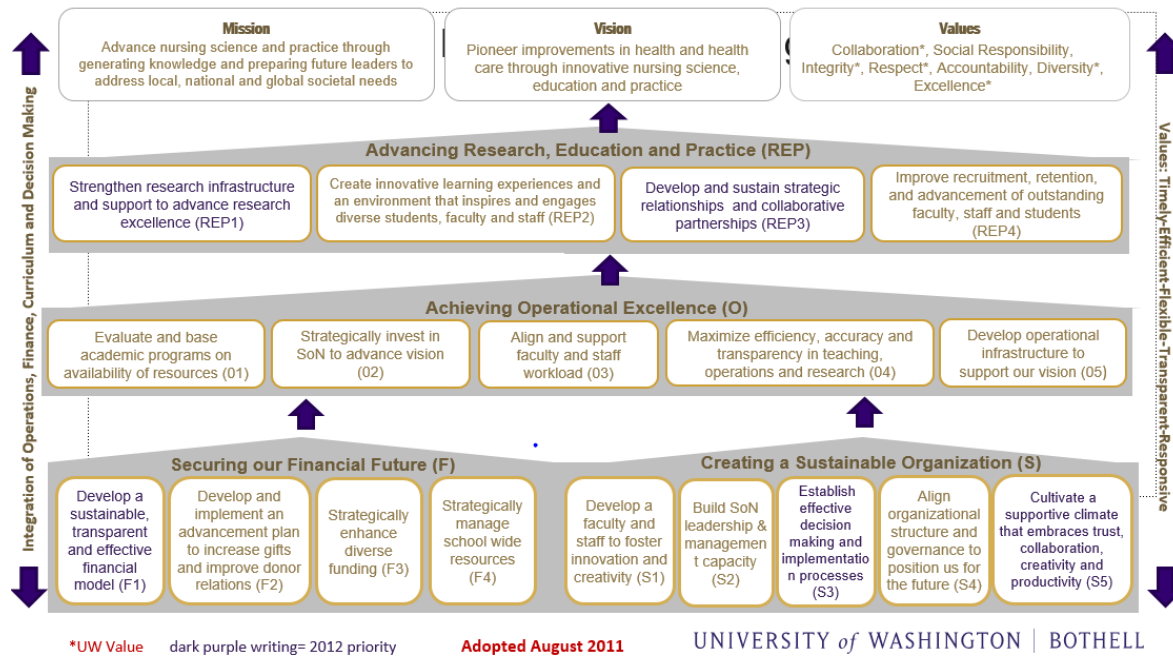
UW BOTHELL CHANCELLOR'S EXECUTIVE TEAM STRATEGY MAP FOR 2017-2020

Source: Ruth Johnston

NMSU LEADS 2025

STRATEGIC PLANNING FRAMEWORK

MAY 10, 2019

BOARD OF REGENTS

Chancellor Dan Arvizu | President John Floros

NM STATE UNIVERSITY

BE BOLD. Shape the Future.

Mission

The mission of the New Mexico State University system is to serve the diverse needs of the state through comprehensive programs of education, research, extension and outreach, and public service.

As the state's land-grant and space-grant university, and as a Hispanic-Serving Institution, NMSU fosters learning, inquiry, diversity and inclusion, social mobility, and service to the broader community.

Vision

By 2025, the NMSU system will excel in student success and social mobility for our diverse student populations, achieve the highest Carnegie research status (R1), and maintain our Carnegie Community Engagement classification.

BE BOLD. Shape the Future.

Vision

By 2025, the NMSU system will:

excel in **student success and social mobility** for our diverse student populations,

achieve the **highest Carnegie research status** (R1), and

maintain our **Carnegie Community Engagement** classification.

Values: NMSU LEADS

- **Leadership:** Promoting and creating the ability for Aggies to shape the future

- **Excellence:** Providing the highest level of education, research, outreach, and service

- **Access:** Welcoming diverse populations to higher education and to the NMSU community

- **Diversity & Inclusion:** Embracing our differences as an asset and actively seeking to include wide-ranging perspectives

- **Student-Centered:** Supporting the education of our students through every aspect of our university, every day

Strategic Goals

GOAL 2
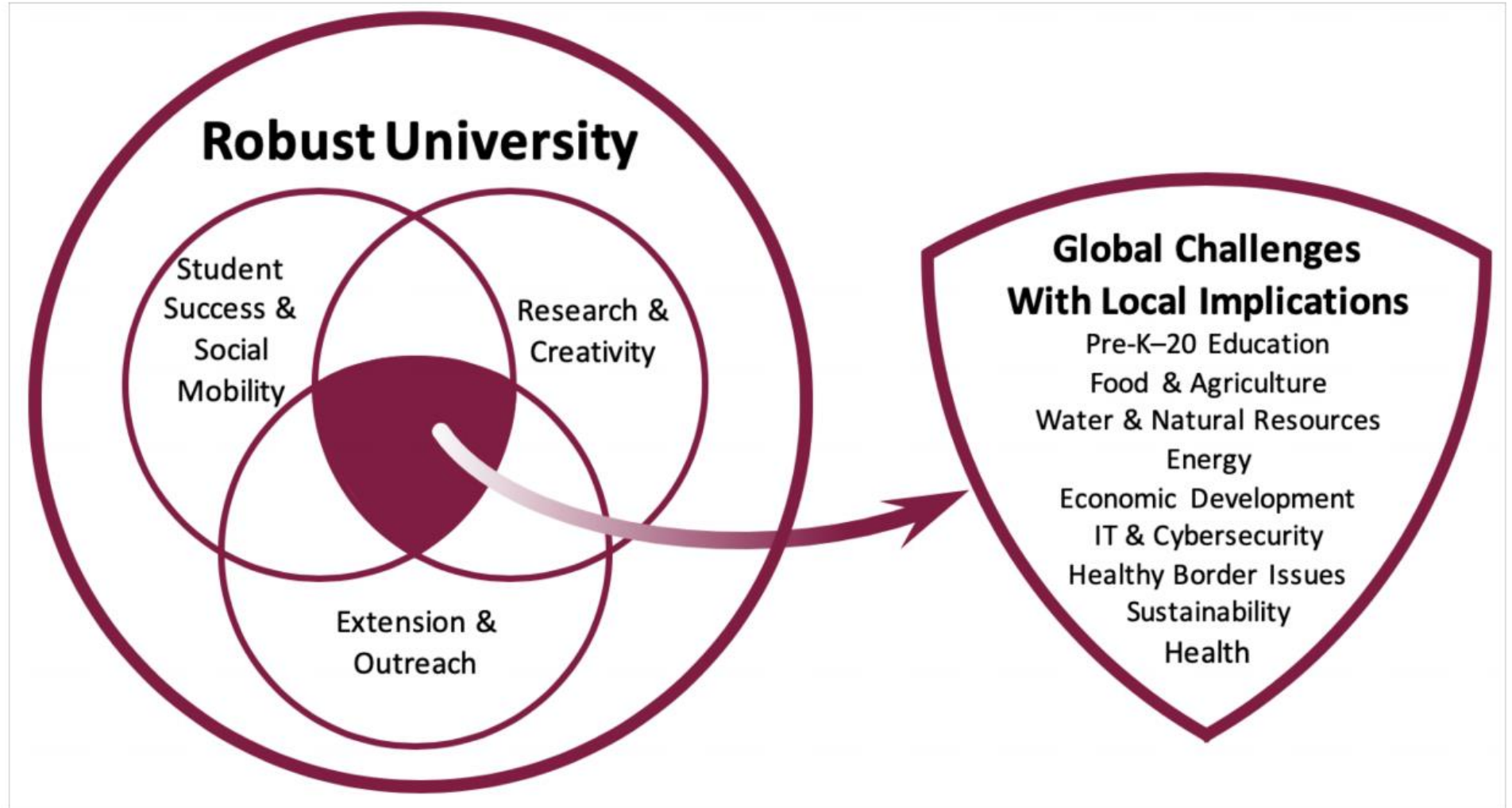**Elevate Research and Creativity**

GOAL 3
Amplify Extension and Outreach

GOAL 1
Enhance Student Success and Social Mobility

GOAL 4
Build a Robust University System

NMSU SYSTEM STRATEGIC GOALS

2025 Goals

54 **7**

Strategic Goals

GLOBAL CHALLENGES

Robust University

Student Success & Social Mobility

Research & Creativity

Extension & Outreach

Global Challenges With Local Implications

Pre-K–20 Education
Food & Agriculture
Water & Natural Resources
Energy
Economic Development
IT & Cybersecurity
Healthy Border Issues
Sustainability
Health

Key Performance Indicators

1. Enrollment
2. Completion (persistence, graduation rate, degrees awarded, average time)
3. Net Price
4. Social mobility index (Such as CollegeNet)
5. Science & Engineering research and development expenditures
6. Non-Science & Engineering research and development expenditures
7. Outreach and extension expenditures
8. Personnel Assets (satisfaction, compensation, productivity, excellence)
9. Resource development
10. Budget alignment and productivity

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Goal 1: Enhance Student Success & Social Mobility
Key Performance Indicators

1. Enrollment
2. Completion (persistence, retention, graduation rate, degrees awarded, average time)
3. Net Price
4. Social mobility index (Such as CollegeNet)

NM STATE

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Goal 1: Enhance Student Success & Social Mobility
Key Performance Indicators

Performance Metrics		Fall 2018 Baseline	Fall 2019	Fall 2020	Fall 2021	Fall 2022	Fall 2023	Fall 2024	Fall 2025		Notes
Headcount Enrollment		14,289	14,300	14,729	15,158	15,587	16,016	16,445	16,500		15% Growth by 2025
Retention Rate	F-Sp	86.9%	87.5%	88.0%	88.5%	89.0%	89.5%	90.5%	91.0%		0.5% growth in persistence annually
	1 yr	73.8%	74.5%	75.0%	75.5%	76.0%	76.5%	77.0%	78.5%		0.5% growth in retention annually
	2 yr	63.0%	63.5%	64.0%	64.5%	65.0%	65.5%	66.0%	66.5%		0.5% growth in retention annually
	3 yr	55.6%	57.5%	59.0%	60.5%	62.0%	63.5%	65.0%	66.5%		1.5% growth in retention annually
Graduation Rate	4 yr	26.4%	27.5%	29.0%	30.5%	32.0%	33.5%	35.0%	36.5%		1.5% growth in graduation rate
	5 yr	41.7%	43.0%	44.5%	46.0%	47.5%	49.0%	50.5%	52.0%		1.5% growth in graduation rate
	6 yr	46.7%	47.0%	48.5%	50.0%	51.5%	53.0%	54.5%	56.0%		1.5% growth in graduation rate
CollegeNET Ranking	Annual	123	123	100	85	65	40	20	10		Top 5% (1,380 ranked schools in 2018)

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Goal 1: Enhance Student Success & Social Mobility Key Performance Indicators

Performance Metrics		Fall 2018 Baseline	Fall 2019	Fall 2020	Fall 2021	Fall 2022	Fall 2023	Fall 2024	Fall 2025	Notes
Headcount Enrollment			14,289	14,300	14,729	15,158	15,587	16,016	16,445	16,500	15% Growth by 2025
Retention Rate	F-Sp	86.9%	87.5%	88.0%	88.5%	89.0%	89.5%	90.5%	91.0%	0.5% growth in persistence annually
	1 yr	73.8%	74.5%	75.0%	75.5%	76.0%	76.5%	77.0%	78.5%	0.5% growth in retention annually
	2 yr	63.0%	63.5%	64.0%	64.5%	65.0%	65.5%	66.0%	66.5%	0.5% growth in retention annually
	3 yr	55.6%	57.5%	59.0%	60.5%	62.0%	63.5%	65.0%	66.5%	1.5% growth in retention annually
Graduation Rate	4 yr	26.4%	27.5%	29.0%	30.5%	32.0%	33.5%	35.0%	36.5%	1.5% growth in graduation rate
	5 yr	41.7%	43.0%	44.5%	46.0%	47.5%	49.0%	50.5%	52.0%	1.5% growth in graduation rate
	6 yr	46.7%	47.0%	48.5%	50.0%	51.5%	53.0%	54.5%	56.0%	1.5% growth in graduation rate
CollegeNET Ranking	Annual	123	123	100	85	65	40	20	10	Top 5% (1,380 ranked schools in 2018)

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Goal 2: Elevate Research & Creativity
Key Performance Indicators

5. Science & Engineering research and development expenditures
   - 25% increase in expenditures by 2025

6. Non-Science & Engineering research and development expenditures
   - $4 to $5 Million in expenditures by 2025

Goal 2: Elevate Research & Creativity Key Performance Indicators

Performance Metrics	FY 2018 Baseline	FY 2019	FY 2020	FY 2021	FY 2022	FY 2023	FY 2024	FY 2025		Notes
Science & Engineering research and development expenditures	$95 M	$95 M	$99 M	$104 M	$109 M	$114 M	$119 M	$125 M		PSL sustains half of the growth
Non-Science & Engineering research and development expenditures	$1-2 M	Aim for growth of $0.75 M per year						$4-5 M		Less annual variability

Goal 3: Amplify Extension & Outreach Key Performance Indicators

7. Outreach and extension expenditures

Performance Metrics	FY 2019	FY 2020	FY 2021	FY 2022	FY 2023	FY 2024	FY 2025
Outreach & extension expenditures	$52.09	$52.74	$53.39	$54.04	$54.70	$55.35	$56.00

Goal 4: Build a Robust University System
Key Performance Indicators

8. Personnel Assets (satisfaction, compensation, productivity, excellence)
9. Resource Development
10. Budget alignment and productivity

Goal 4: Build a Robust University System
Key Performance Indicators

8. Personnel Assets

- Satisfaction—climate survey of faculty, staff and students every two to four years

- Productivity—develop productivity index for units, faculty and staff

- Compensation—increase average salary by 20% by 2025 based on strategic goal progress and achievement

Goal 4: Build a Robust University System Key Performance Indicators

9. Resource Development
- Alumni engagement (membership, event attendance, support of the university)
- Dollars raised
- Increase in endowment
- Successful campaign conclusion
- Plan new campaign

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Goal 4: Build a Robust University System Key Performance Indicators

10. Budget alignment and productivity
 - Resources allocated based on defined metrics

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Goal 4 : Building a Robust University

Priorities	Centralized Initiatives	Examples at Unit Level
Improve business and operational practices and processes to achieve a culture of service and excellence	Map current processes and reduce steps, approvals to better meet user needs and improve process timeliness and accuracy	Use Lean process improvement methods at College/Unit levels for local level improvements
Improve staff, faculty and student diversity, inclusion and engagement	Understand current level of system-wide support and develop a more integrated plan to implement.	Use diversity plan and best practices for hiring and retention
Enhance professional development and training for faculty, staff and student employees	Develop supervisory and management training and assure participation	Develop faculty, staff and student employee individual development plans, with support
Improve climate and morale throughout NMSU system	Conduct climate survey and forums and be accountable and committed to implement and measure improvements	Use results of climate survey and forums to be accountable and committed to implement and measure improvements at the College/Unit level
Calibrate resources, incentivize actions, and align budget with strategic priorities	Create and implement budget model to better serve needs of campus, including responsiveness	Share budget (revenue and expenses) with College/Unit to build understanding and transparency
Optimize system-wide physical and technical resources and assets.	Develop a sustainable framework and resilient processes to support the NMSU system	Do a needs assessment to ensure technology resources and physical assets meet the needs of the College/Unit.
Establish strategic alignment with the NMSU Foundation to raise, manage, and steward private resources in support of the NMSU system	Pending new VP Advancement arrival	

Sample of Action Plan Development for each priority

Action Plan **Name:** Improve business and operational practices and processes to achieve a culture of service and excellence **Date:** 10-8-2019

Background / Problem Statement

Process efficiency and effectiveness needs improvement. Many processes whether business, student, or operational require manual intervention and are not fully automated to the extent possible. Manual processing leads to delays in the completion of transactions and processes particularly when changes to transactions are necessary.

Purpose of the Activity

Drive operational efficiency and effectiveness improvement. Develop an improved culture of customer service within the NMSU system.

Specific Goals / Objectives

Objectives:
1. Fully implement eProcurement (AggieMart) across the NMSU system.
2. Fully implement the student success management system (EAB Navigate) for the university and community colleges.
3. Develop or procure an automated travel and expense system.
4. Streamline Human Resource (HR) hiring process
5. To the extent possible, maximize the use of Banner 9.
6. Create consistent approach to enhance customer service and meet user needs.

Timeline

1. Continue the phased-in implementation of AggieMart with a final completion during fiscal year 2020-21.
2. Begin to utilize EAB navigate for students in Spring 2020 with continual improvement and refinement of interventions through academic year 2021-22.
3. Acquire a travel and expense system during fiscal year 2020-21, begin implementation with a goal of using the system for 2022-23.
4. Immediately begin the review of HR policies and procedures to identify those that may be mitigated to improve processes.
5. Begin to evaluate Banner modules during fiscal year 2019-20.
6. Identify customer service approach during fiscal year 2019-20.

Strategic Alignment

- Goal 4 – Build a Robust University System
- Objective 4.3: Establish operational excellence through metric-driven, service-oriented approach
- Action a. Develop metric-driven decision-making processes that drive operational efficiencies
- Action b. Provide system-wide technology solutions that are flexible, responsive, and secure

Measures to be Used: baseline, progress, outcomes

- Business process completion transaction times
- Transaction error rates
- Number of new processes automated
- Eliminate redundancy

Sponsor / Owner

Project Leader / Manager

1. Javier Cordero, 2. Renay Scott & Siri Rogers, 3. D'Anne Stuart, 4. Gena Jones, 5. Norma Grijalva, 6. Ruth Johnston

Facilitator (if one is needed)

Team Members

- Andy Burke, Sr. VP Administration and Finance
- Kelly Brooks, DACC VP for Business and Finance
- Kathy Brook, Associate Dean, College of Business
- D'Anne Stuart, Associate VP Administration and Finance

Finally, you will need to realign and adjust your budget when there are major macro shifts in the environment

NMSU Budget Realignment Principles

The mission of the New Mexico State University system is to serve the diverse needs of the state through comprehensive programs of education, research, extension and outreach, and public service. As the state's land-grant and space-grant university, and as a Hispanic-Serving Institution, NMSU fosters learning, inquiry, diversity and inclusion, social mobility, and service to the broader community.

This mission and the NMSU LEADS 2025 goals guide how NMSU will respond and adapt to budget changes. Below are principles that will be used to realign resources with priorities.

Strategy
- Resource realignment decisions must be strategic, in concert with LEADS 2025, informed by data, and not across the board. Given the greatest concentration of resources is in positions, realignment decisions are likely to include eliminating positions in some units and potentially even adding positions in others
- Prioritized essential core mission

Mission Driven
- Minimize impact on student success
- Prioritize strong academic programs
- Maintain or enhance excellence in research, scholarship and creative activity
- Foster outreach and extension in our communities; impact economic and workforce development

Our People
- The safety and health for students, faculty, staff and visitors is paramount
- Incentivize collaboration

Process Improvement and Operations
- Seek to gain efficiencies, emphasize cost savings and use resources wisely
- Understand and maximize workload
- Identify things we can stop doing to make room for new processes
- Invest in technology to security automate processes
- Identify synergies and eliminate services that exist within several units
- Combine small administrative units to reduce less overhead and management to direct resources to the university's teaching, research, and outreach and extension functions; leverage strategic partnerships
- Be data informed
- Be transparent and timely. Communicate and document changes to the community.

Focus on the Future
- Increase private support and entrepreneurial opportunities
- Incentivize revenue generating strategies
- Invest in needs for campus to remain operational, such as digitization and classroom technology
- Build an integrated system

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Participant Participation – Polling Question 1

I could clearly articulate my university's mission, vision, values and priorities (without looking it up).

1 = Strongly Agree
2 = Agree
3 = Disagree
4 = Strongly Disagree

Discussion topics

- Introductions and Overview

- Plenary: Strategy Formulation Under COVID – Survive and Thrive

- **Breakouts**

- Report Outs

Participant Participation – Polling Question 2

What is the biggest challenge to improving strategic actions on your campus?

1 = Commitment to status quo
2 = Financial resources to invest
3 = Leadership

Breakout Discussion Topics

1. How clear is the strategy at your campus?

2. Do you feel that your institution is strategically cutting administrative and academic expenses while reinvesting for growth?

3. How can you contribute to more strategic action at your university/college?

Discussion topics

- Introductions and Overview

- Plenary: Strategy Formulation Under COVID – Survive and Thrive

- Breakouts

- **Report Outs**

Teams report out key topics, insights, and recommendations

What is the general level of morale of faculty, staff, and students on your campus?

1 = Low
2 = Medium
3 = High

Thank you to our program organizers and sponsors