

## Strategic Planning

Stevens Strategy is a full-service consulting firm specializing in managing the process of strategic change in colleges, universities and schools. We offer professional services to the leaders of these institutions in the areas of Strategic Planning, Strategic Governance, Focused Strategic Analysis, Financial Analysis and Planning and Institution-wide Policy Development. Our clients include independent and public institutions from the largest universities to the smallest colleges and schools in America and the world.

Our consultants have extensive experience serving colleges, universities and schools—including positions as present and former trustees, presidents, faculty, vice presidents and other senior staff—each with a particular area of expertise in college, university and school leadership and management. Dr. Stevens began Stevens Strategy in 2003. Prior to the founding of the firm, in his 17 years as a higher education consultant, he worked at about 100 colleges and universities with a primary focus on strategic planning. He has also served as an assistant to the president of a prestigious large urban university, chairman of the board and interim president of a small struggling liberal arts college, vice president of a prestigious professionally oriented college and an administrator of a state-wide higher education agency. He and his Stevens Strategy colleagues have the experience and know-how to provide the highly competent facilitation institutions need to develop a dynamic and sound vision, strategy and operational plan that strengthens its governance structure.

Dr. Stevens developed the forerunner to our strategic planning process in the late 1970's at Rhode Island School of Design, where he was Vice President. In the years since then, we have honed this method of strategic planning into a highly successful five-phased process. Stevens Strategy and Dr. Stevens have facilitated strategic planning initiatives at the following 33 institutions:

Albright College  
American University of  
Central Asia  
Barry University  
Bellarmino University  
Butler University  
Cabrini College (twice)  
Gallaudet University  
Gettysburg College  
Gwynedd-Mercy College  
Holy Family College  
Immaculata University  
Jackson State University  
Kentucky Wesleyan College  
Linfield College  
Marian Court College  
Mount Aloysius College  
Mount Holyoke College  
New England College  
Northfield Mount Hermon  
School

Peirce College  
Pro Arts Consortium  
Polytechnic of Namibia  
Regis College  
Rosemont College  
Seton Hall University  
Smith College  
Southern California  
University of Health  
Sciences  
Tiffin University  
University of Evansville  
University of Indianapolis  
University of St. Thomas  
Vaughn College of  
Aeronautics and  
Technology (twice)  
Wilmington College

The Stevens Strategy process encourages the president and board to lead their institution in developing its vision and strategy, yet it also provides a process that allows the whole campus community—its faculty, staff, students, alumni and others—to take ownership of the plan through extensive involvement in its development. The consistent achievement for our clients of both of these objectives (executive leadership and broad ownership) while producing a sound and compelling strategic plan is a feat that distinguishes the Stevens Strategy process. Each of the phases of the process focuses the members of the campus community on their proper role in the overall governance and management of the institution.

The full process normally takes 12 to 18 months to complete. It contains deliverables including the strategic agenda, which is the visioning document that contains the strategic initiatives the college will pursue over about a 5-year time horizon, strategic planning work group reports, operational plans and strategic planning fact books.

Once we are engaged, we provide our clients an in depth, proprietary six-chapter strategic planning manual and a large sample of client strategic plans, strategic planning work group reports, strategic planning fact books and operational plans for reference.

Here's how all of our clients rate our work:

All Stevens Strategy clients are asked to rate Stevens Strategy on a numerical scale for our performance in all service components for each project. The scale is from 1 to 10. One is “Not Satisfied at All” and 10 is “Completely Satisfied.” Following are the results tabulated through 2010 for all clients responding.

<b>Score</b>	<b>Service Component</b>
9.31	Overall project success
9.40	Overall project management
9.58	Communication
9.32	Documentation and other resources provided
9.33	Written reports
9.16	Oral presentations
9.42	Meeting management / facilitation
9.63	Adherence to deadlines / timeliness
9.70	Billing and administrative services
9.23	Value of services compared to price for services
9.73	Other: Client Designations*
<b>9.42</b>	<b>Overall Average Score</b>

\* Availability, Collaborative Abilities, Counsel to President, Friendliness, Interpersonal Skills, Knowledge of Culture of Higher Education, Market Survey, Personal Integrity, Professionalism, Responsiveness to Need/Critique.

## The Five Phases of Strategic Planning

The full strategic planning process includes the following five phases:

- I. Process Design
- II. Response to Strategic Issues
- III. Strategic Agenda Development
- IV. Operational Planning, and
- V. Implementation

The particular process Stevens Strategy follows is designed around each institution's culture and needs. The strategic planning process may include other strategic support services such as facilitation of a board self-evaluation retreat, financial planning and analysis, the conduct of a comprehensive academic program review or survey research to support new program ideas. The following are the five phases of the general Stevens Strategy process:

- **Phase 1, Process Design** – We conduct extensive interviews with faculty, staff, students, alumni, trustees and others through which we gain an understanding of the institution's culture and the strategic issues it faces and have the opportunity to train the community in the process of strategic planning. We also guide the institution in the preparation of a strategic planning fact book. In short, we assess the institution's readiness for planning and develop a recommended process for planning that accounts for institutional strengths and weaknesses. At the end of this phase, we also facilitate a conference with a variety of institutional stakeholders, including members from the Board of Trustees, administrators, staff, faculty, students, alumni, business leaders, feeder schools, employers, other institutional friends and members of the local community. The purpose of the stakeholder conference is to categorize strategic issues into the big strategic questions the institution will need to answer and to create an enthusiastic environment for the remaining phases of strategic planning.
- **Phase 2, Preparation of Responses to Strategic Issues** – The campus community will then become involved in a broadly participative process that explores responses to the strategic questions raised in the Process Design phase. This phase includes extensive work on the part of a strategic planning Steering Committee and Task Forces (work groups), which we facilitate. The Steering Committee and Task Forces usually hold numerous open campus meetings and meetings with the Board of Trustees on the strategic planning process.
- **Phase 3, Strategic Agenda Preparation** – We prepare the first draft of the institution's vision and strategy, which the President will complete with our support and which will receive the endorsement of the Steering Committee and campus community and the approval of the Board of Trustees. This document will become the central reference point for the initiatives that the institution will pursue over the next five years.
- **Phase 4, Operational Planning** – We design an operational planning process and we facilitate the preparation of that operational plan. This document is usually prepared by one or more work groups and includes the specific programs, budgets, time-lines and responsible parties necessary to implement each strategic initiative and a measurement system to assess whether the strategic plan initiatives will have been successfully implemented.
- **Phase 5, Implementation** – We design in phase four an implementation process that the President and Steering Committee lead in phase five. That process includes regular review of the strategic environment, a system for measuring success with the implementation of the strategic

agenda, a system for updating the strategic and operational plans and a system for regular reporting to the Board and the campus community. Stevens Strategy attends up to five Steering Committee meetings during the implementation period. We are also available to provide additional consulting support for the implementation in Phase 5 should you desire that additional support. Please see Attachment One for a list of available consulting services.

We can work with your institution through some or all five phases, depending on your needs, to develop and achieve the path to your desired future. The first four phases of the process, which we normally facilitate, require 12 to 18 months to complete. Implementation is usually organized around a 5-year timeline. We can develop a fee structure that meets your needs. Even the full process fee can be adjusted based upon your ability to pay, and billing can be timed so that your payments are made over two or even three fiscal years.

Our strategic planning products also include an accelerated version, in which we work with you and a cross-functional team of your choosing to develop a strategic analysis and report describing your environment and the strategic direction your institution should pursue. This product requires about 3 to 4 months to complete and includes presentations to your campus community and board, which we will lead according to your needs. The planning scope can be limited with this product, which reduces its cost. The process can be complemented, for instance, with survey research on any aspect of your market or competition, which will make the product more expensive. The process also can be complemented with wider campus involvement, which we facilitate and which increases our time commitment and your costs.

We are exceptionally good at this work. Our clients consistently give our work high ratings as you can see, and they also rate very highly the value of our work compared to the price for our services.

We would be delighted to answer any questions you or your colleagues may have and would be more than willing to visit with you at your campus to prepare a proposed contract for you. We would be thrilled to serve you as the facilitators of your strategic planning process.

We will exceed your expectations.