

# CONDUCTING A STRATEGIC PLANNING MIDPOINT CHECK-IN:

Case Studies and Framework

### Summary

Strategic planning has become increasingly critical for higher education institutions navigating complex and continuously uncertain environments characterized by demographic shifts, funding pressures, policy changes, and evolving student needs. To survive and navigate this environment effectively, leaders must develop a strategic plan that is flexible, adaptable to change, and aligned with the institutional mission. In essence, while the goals may remain constant, the strategy to achieve them should evolve based on the institution's current internal conditions and external circumstances.

Conducting a campus-wide, midpoint check-in halfway through a strategic plan allows institutional leaders to assess progress, identify obstacles that were not present during the plan's creation, recalibrate goals within the current campus context, and reinforce accountability to ensure the institution is on pace to meet its objectives or should recalibrate to chart a revised path forward. Most importantly, by involving the broader campus community, leadership also ensures that all stakeholders are transparently informed while reenergizing engagement during the review process to maintain buy-in for the campus's direction.

This white paper examines common gaps higher education institutions face when conducting a campus-wide strategic plan midpoint checkin. While extensive literature exists on plan development and annual review processes, limited guidance addresses the specific methodologies, timing, and stakeholder engagement strategies for effective midpoint evaluations. This paper draws on recent institutional experiences, over 40 years of experience in higher education strategic planning, and recent case studies from a wide range of higher education institutions, including small, liberal arts colleges, regional publics, research institutions, and medium-sized privates.

Included in this paper are reviews of Michigan State University, Old Dominion University, Seton Hall University, Skidmore College, and York College-CUNY's strategic planning midpoint reviews and updates, each of which occurred within the last five years.

The white paper concludes with a framework for conducting a successful strategic planning midpoint addressing common implementation challenges such as data quality issues, stakeholder fatigue, and resource constraints. Institutions implementing these recommendations can expect improved plan relevance, enhanced stakeholder engagement, ultimately buy-in, and more effective resource allocation. The evidence suggests that systematic midpoint evaluations are essential for maintaining strategic momentum in today's rapidly changing higher education landscape. Ultimately, institutions who approach midpoint reviews as opportunities for learning and recalibration can strengthen their community and build resilience in uncertain times.

### Background

Strategic planning in higher education has been a prevalent practice since the 1970s¹. It has traditionally followed a linear model: environmental scanning, iterations of conversations and goal setting with the campus community, Board and leadership approval, operationalizing, and, sometimes, periodic review. Society for Colleges and Universities Planning (SCUP) defines integrated planning as "a sustainable approach to planning that builds relationships, aligns the organization, and emphasizes preparedness for change."<sup>2</sup>

A 2016 study in the Journal of Education Planning found that strategic planning effectively helps departments, programs, and organizations create mission and vision statements, define organizational goals, and develop action plans<sup>3</sup>. It also plays a key role in sharing organizational information, encouraging participation, welcoming new members, and increasing awareness of strengths and areas for improvement. This paper draws on recent institutional experiences, over 40 years of experience in higher education strategic planning,

and recent case studies from a wide range of higher education institutions, including small, liberal arts colleges, medium-sized privates, regional publics, and research institutions.

At the same time, SCUP's definition above recognizes that the on-campus environment changes rapidly, requiring institutions to adapt their strategies while maintaining a focus on core objectives that balance short-term pressures with mediumand long-term goals. Industry trends have also increasingly recognized the need for environmental scanning updates, acknowledging that external conditions can change rapidly enough to require frequent internal adjustments4. Yet, since strategic planning is most successful when faculty, staff, and students have an opportunity to collaborate and there is a common understanding of the need to adapt to a changing environment, why are more institutions not engaging with their community and updating their strategic goals accordingly?



### **Gap Analysis**

Our firm's 40 years of experience illuminate several gaps in current higher education strategic planning processes and factors limiting midpoint evaluations:

- Most institutions lack standardized frameworks for these evaluations, leading to inconsistent approaches and missed opportunities for improvement. Without established protocols and methodologies, such as monthly meetings of an Operational Planning Committee or regular engagement with the campus community, institutions often rely on ad hoc assessment methods that are inconsistent in their rigor, scope, and execution. This lack of systematic evaluation protocols creates barriers to evidence-based decision-making because leaders do not have access to comparable data across different initiatives, programs, or years within the strategic plan.
- Stakeholder engagement strategies often concentrate on internal updates to the campus community while undervaluing feedback and external perspectives that could offer valuable insights for adjusting strategic direction. Typically, stakeholder engagement takes the form of regular campus-wide updates and community forums, mainly aimed at sharing information rather than gathering diverse viewpoints. Various stakeholder groups often view strategic goals differently; thus, they should be asked for feedback on the quality, timelines, and accuracy of these goals. Effective evaluation processes recognize these differences, benchmark them against current goals, set or reaffirm priorities, and aim to build consensus around institutional objectives through communication and transparency. Further, including external perspectives can reveal gaps between institutional intentions and outside perceptions, and spot emerging trends that internal stakeholders might miss, offering vital feedback.
- Institutions struggle to find a balance between thorough evaluation and limited resources. The desire for detailed assessments often clashes with constraints such as administrative, faculty, and staff time as well as the need to focus resources on other pressing problems. This trade-off weakens the evaluation's ability to provide valuable insights for improvement, creating a cycle where limited resources lead to limited learning, which then makes it harder to justify adopting new methods or strategies.
- The connection between strategic planning evaluation and other institutional assessment processes remains weak, leading to duplicated or siloed efforts that hinder positive improvements. Strategic planning evaluation often works independently of related assessment activities, such as academic program reviews, accreditation self-studies, student outcome evaluations, and operational audits. This separation happens despite significant overlap in data needs, analytical methods, and stakeholder groups across these evaluations. Repeated data collection burdens the community with unnecessary surveys and interviews, which can lower response rates and cause evaluation fatigue, all while valuable information collected through one assessment's process is isolated from informing the work of other methods. This results in missed chances for a holistic understanding of the institution by capitalizing on work already completed.
- While some institutions have developed methods for data collection and analysis, they often lack structured frameworks for translating insights into actionable strategic adjustments. Successful plan modifications require effective communication strategies to ensure stakeholder engagement and buy-in, resource reallocation mechanisms that can adapt to changing priorities, and governance structures capable of making prompt decisions without undermining deliberative processes. This implementation gap highlights both procedural and cultural challenges that go beyond technical evaluation skills. The approach of implementing evaluation-driven changes requires change management capabilities that many institutions have not fully developed or are unable to sustain.



### Possible Solutions -

### Review of Case Studies and on-Campus Examples

Having identified significant gaps in current strategic planning assessment practices, we now turn to examine real-world examples of how institutions have approached midpoint evaluations. The following case studies represent diverse institutional contexts, methodologies, and outcomes in strategic plan assessment. Their experiences provide concrete evidence of the theoretical gaps identified in our analysis while also revealing innovative approaches that merit consideration in future framework development. The institutions examined, Michigan State University, Old Dominion University, Seton Hall University, Skidmore College, and York College-CUNY, represent different institutional types, planning cycles, and assessment philosophies. Through careful examination of these institutional experiences, we can better understand the practical challenges facing higher education leaders and identify the essential components needed for more effective midpoint assessment frameworks.

# Michigan State University: MSU 2030 Strategic Plan Refresh<sup>5</sup>

Michigan State University's approach represents a unique model of strategic plan evolution through its "refresh" process of MSU 2030: Excellence for Global Impact. Initially launched in September 2021, the 10-year plan underwent significant revision in 2024-2025 under a presidential transition, culminating in a refreshed version released in August 2025.

MSU's methodology demonstrates institutional learning and adaptability by building refresh mechanisms directly into its strategic planning framework. This approach acknowledges that strategic plans must evolve with changing circumstances while maintaining core directional elements. The updated version and process were extremely comprehensive, involving "refresh, reframe, reimagine, and reaffirm" activities that suggest both continuity and change. However, the available information provides limited insight into specific outcomes, challenges, or lessons learned from the initial four-year implementation period. Further, there is no comparison between the updated August 2025 version and the original September 2021 version, leaving readers unable to easily discern what has been updated or what has changed.

### Old Dominion University: Forward-Focused Strategic Plan Midpoint Summary<sup>6</sup>

Old Dominion University's midpoint assessment of its "Forward-Focused: Where Innovation Meets Possibilities" Strategic Plan (2023-2028) presents a remarkably positive progress report. The university organized its strategic framework around seven focal areas with 30 goals and 103 strategies, with 50 strategies completed with additional progress expected, 42 on track, and 11 experiencing delays.

The report lacks a deep dive into the accuracy of timelines and a detailed discussion of implementation difficulties or strategic pivots. For instance, the three options presented by ODU's timeline tracking are "began, but progress may be delayed", "on track", and "successfully completed, but additional progress expected/possible," are all vague in their timelines and offer no communication on their in-depth progress. For instance, something marked "began, but progress may be delayed" could have had one meaningful action completed, but progress has been stalled for months or semesters since that action, and it is essentially no longer being pursued. Alternatively, something marked "on track" does not indicate when the community should expect completion. Lastly, none of these options allows for an action item that requires any recalibration or reframing. Across 103 strategies, it seems unlikely that none of them may need to shift in any way. Overall, the broader community lacks a clear understanding of the current progress of the strategic plan, including whether any of the strategic goals are outdated and need to be reworked.

### Seton Hall University: Harvest Our Treasures Strategic Plan Symposium<sup>7</sup>

In February 2021, Seton Hall University launched its 2021-2023 strategic plan, "Harvest Our Treasures". The institution implemented a distinctive midpoint assessment approach through their "Midway Through the Journey" symposium in May 2022. Leading up to the symposium, the university organized a comprehensive day-long community engagement event that combined progress reporting with collaborative reflection and feedback collection. The symposium demonstrates innovative stakeholder engagement, featuring external higher education experts providing national context, goal committee co-chairs delivering progress briefings, and structured community discussions about implementation challenges and opportunities. This approach emphasized shared governance and collaborative decision-making, reflecting the plan's commitment to community-wide engagement in strategic execution. Seton Hall's methodology stands out for its emphasis on transparency and community involvement, moving beyond traditional top-down assessment approaches. The inclusion of external experts provided valuable benchmarking and context that many institutions lack in their internal assessments.

The symposia concluded with a reception and a display of books published by the University's faculty, in recognition of their contributions toward achieving the University's Academic Vision. Following a review of the symposium feedback, a community update was issued, noting that many February 2021 goals were not on track. Consequently, the plan was extended by two years to 2025. Seton Hall issued an updated plan and timeline that flowed into a new plan, "Inspiring Great Minds to Greater Purpose: Strategic Plan 2025-30."



### Skidmore College: 2015-2025 Strategic Plan Midpoint Review<sup>8</sup>

Skidmore College conducted a comprehensive midpoint review of its 2015-2025 "Creating Pathways to Excellence" strategic plan in December 2020. The review was notably shaped by the COVID-19 pandemic and a presidential transition, demonstrating how external forces can fundamentally alter strategic implementation, yet it highlights how leadership can effectively respond to maintain nimbleness through these external pressures.

The assessment was transparent and revealed mixed progress across 77 distinct action items: 22% completed, 58% process, and 19% deferred. Notably, Skidmore achieved significant milestones, including completing a \$50 million fundraising goal for their Center for Integrated Sciences and implementing a new General Education curriculum. However, COVID-19 financial pressures emerged as a significant constraint, notably a sharp increase in demand for financial assistance (from 55% in 2015 to 75% in 2020 of applicants) that required budget reallocations. These were presented openly and honestly to the campus community through faculty and staff committees, campus forums, and a community-wide announcement with trackable metrics and data, recognizing that many other priorities had to be deferred due to budget shifts. The announcement serves as a candid acknowledgment of both achievements and limitations, providing transparency about the challenges of maintaining strategic momentum during a crisis.



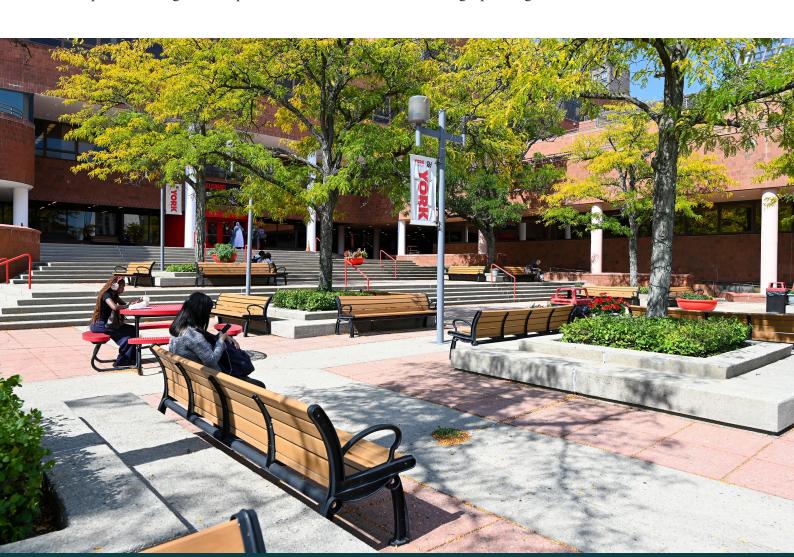
# York College-CUNY: One York Strategic Plan Assessment?

York College's midpoint assessment process, conducted through its Faculty Senate meetings in December 2023, represents a more traditional governance-based approach to strategic plan review. Operating within the CUNY system's broader "Lifting New York" strategic framework, York College implemented its "One York" plan (2020-2025) with specific attention to institutional effectiveness and strategic planning integration.

The college's approach emphasizes data transparency and regular assessment reporting with its Faculty Senate in close collaboration with the Office of Institutional Effectiveness and Strategic Planning, which integrates institutional research, assessment, strategic planning, and accreditation functions. This organizational structure suggests a more systematic approach to ongoing plan monitoring and adjustment than many institutions employ. However, the limited available documentation of specific feedback loops with students, broader community members, and staff outside of the Office of Institutional Effectiveness and Strategic Planning makes it challenging to assess the effectiveness of their midpoint review process.

### Conclusion:

These case studies reveal both the potential and the challenges of midpoint strategic plan assessment in higher education. While approaches vary significantly, the commitment to systematic review and adaptation represents strong leadership with a commitment to holistic strategic planning.



### **Common Strengths Across Cases:**

- All five institutions demonstrated a commitment to formal midpoint assessment processes, recognizing that strategic plans require regular monitoring and potential revisions.
- Each institution maintained its strategic frameworks while adapting to significant external challenges, notably the COVID-19 pandemic and presidential transitions. The cases show diverse approaches to stakeholder engagement, from Skidmore's executive-led review and transparent approach to external pressures to Seton Hall's community symposium model that resulted in an expanded timeline.
- Several institutions effectively integrated data collection and reporting mechanisms into their assessment processes. ODU's comprehensive tracking of financial and performance metrics and York College's emphasis on institutional effectiveness demonstrate the value of systematic data integration.

### What Campuses Could Have Done Differently

Operational Meetings Commencing with the Initiation of the Strategic Plan. The most effective way to conduct a midpoint check-in is through regular meetings of an Operational or Strategic Planning Steering Committee that continues to meet after launching a strategic plan. These meetings help ensure the strategic initiatives stay on track by responding to external changes and staying connected with the internal environment. When these meetings happen regularly, a formal midpoint check becomes much easier for the campus because they have already developed habits of making small, necessary adjustments to keep moving forward.

Enhanced Stakeholder **Engagement** and Communication. While Seton Hall demonstrated community innovative engagement, other institutions relied heavily on administrative governance-based assessments. Broader stakeholder engagement would provide valuable insights and sustain community investment in strategic success. Institutions should consider using multiple engagement methods to collect diverse perspectives, such as digital feedback platforms, focus groups, or structured interviews.

Better Integration of External Context and Benchmarking. Most institutions rely mainly on internal assessments without enough external context or peer comparison. Seton Hall's inclusion of external experts offers a model for incorporating outside perspectives that can improve strategic decision-making. Regular environmental scanning, peer benchmarking, and outside advisory input could enhance midpoint assessments by providing context for institutional performance and emerging challenges or opportunities.

#### The Importance of Timing and External Factors.

The case studies reveal how external events can significantly change strategic implementation timelines and priorities. Institutions need flexible frameworks that can handle disruptions while keeping strategic goals intact.

Integration with Ongoing Institutional Operations. The most successful examples demonstrate strong integration between strategic planning assessment and regular institutional effectiveness processes. Viewing strategic evaluation as separate from ongoing institutional research and planning may reduce both efficiency and impact.

# Recommendations – A Framework for Conducting a Midpoint Review

A midpoint review is a crucial mechanism for ensuring that institutional strategic plans remain relevant, evidence-based, and aligned with both mission and external realities. To be effective, the process must prioritize communication and transparency to ensure that information flows clearly across constituencies and that review outcomes are broadly understood, trusted, and actionable. The framework below highlights how higher education institutions can conduct a comprehensive midpoint review of their strategic plan.

### 1

# Get Ahead of the Problem with an Operational Planning Committee. If Not, Establish Clear Governance of the Review Process

Effective governance needs structures that are both representative and transparent in their processes. Institutions should assign the current Strategic Planning Committee (SPC) or an equivalent governance body to meet regularly and review the strategic plan. With the current higher education landscape, by the time the strategic plan is put into print and an announcement is made, there is already something in the external environment that calls for a review or course correction. This will save the institution time, resources, and overall effort during the length of the strategic plan. This allows the campus to naturally cycle members who have retired or left the institution, ensuring new and diverse perspectives are heard while maintaining institutional knowledge of the original strategic planning process.

If that is not the case, reconvene a cross-functional committee with membership that must be representative of the community, including academic leaders, administrative units, faculty governance members, student representatives, and external stakeholders. In many cases, it is best to have staff and faculty co-chairs to reinforce shared governance principles.

#### **Key Steps:**

- Confirm Steering Committee membership and communicate the SPC's charge broadly to the campus community
- The Steering Committee should:
  - Create and publicize clear decision-making protocols so that the process is seen as accessible and accountable
  - Define scope, timelines, and deliverables, both for internal use and for external sharing, to reinforce transparency

# Align with Calendars and Resource Planning

Clear timing and practical resource planning build trust in the review process. This review process should take anywhere from 3-5 months, depending on the size of the campus. Sharing timelines ahead of time allows stakeholders to participate at appropriate moments.

#### **Key Steps:**

- Plan to conduct reviews in specified intervals (Year 3 of five-year plans; Year 2 of three-year plans; Year 5 of ten-year plans) and make the schedule widely available to the community.
- Align review timelines with academic and fiscal calendars and openly communicate how review findings
  will inform future budgetary and operational decisions, and when the community can expect changes to
  impact them.
- Clearly communicate resource needs, such as staffing, technology, and surveys, to highlight institutional investment in openness and accountability, as well as notify staff when they can expect to be involved in the process.

### Update Environmental Scan with Up-to-date Data

Transparent assessment begins with a sincere and honest review of an institution's performance against initial benchmarks and a review of the current higher education landscape.

### **Key Steps:**

- Reassess key performance indicators (KPIs) and share data in formats accessible to varied audiences.
   Highlight where initiatives have been completed, have yet to be started, are in progress and on track, are in progress and off track, or have misaligned/unattainable and need to be recalibrated.
- Conduct a high-level environmental scan using reliable external and internal data, ensuring the findings are communicated to key institutional leaders and stakeholder groups.
  - Include a high-level review of peers and aspirant institutions to identify any key strategies that can be emulated for on-campus success.
  - If possible, bring in a trusted third party to conduct an unbiased update of the Environmental Scan and identify key institutional blind spots.

## Gather Widespread Community and Key Stakeholder Feedback

Consistent, clear, and open communication with stakeholders is vital to ensure the review process remains inclusive and trustworthy. Stakeholder feedback should not only be gathered but also shared to demonstrate that contributions are recognized and appreciated.

#### **Key Steps:**

- Tailor communication tools for each stakeholder group's needs (e.g., digital surveys, town halls, virtual and/or in-person focus groups, community and employer roundtables, etc.).
  - Where existing communications channels are weak, launch Listening Tours that combine inperson and virtual sessions to ensure broad stakeholder engagement.
  - If breakdowns are consistent across stakeholder groups, map where they occur. Utilize this process to better the campus community and culture.
- Ensure transparency by publishing broad, high-level summaries of stakeholder feedback that protect confidentiality while sharing themes and trends.

# Integrate other Cross-Campus Initiatives

Transparency involves linking the midpoint review with other strategic processes throughout the institution so that stakeholders see a clear, unified view of progress and direction.

### **Key Steps:**

- Compile and review accreditation reaffirmations, academic reviews, policy updates, and other internal strategic projects to identify areas for aligning efforts to aid the midpoint review.
- Cross-reference findings with parallel plans and policies, such as updated campus master plans, updated
  policy manuals and handbooks, and/or new technology strategies, explicitly communicating how various
  initiatives interrelate and inform each other.
- Integrate any key findings into an updated version of the Strategic Plan.
  - Draft revisions that reflect contemporary realities while preserving institutional strategies, traditions, and follow the Mission.

### 6 Produce Actionable Outcomes

Institutions build credibility when outcomes are not only documented but also shared openly, including future steps.

### **Key Steps:**

- Update the Strategic Planning Document and Dashboards.
- Produce a comprehensive midpoint review report that is shared with the community using multiple communication formats (written reports, presentations, dashboards).
  - Model the way by admitting missteps and miscalculations, with a plan for recalibration. By modeling the behaviors of transparency, respect, and shared responsibility, leaders set the tone for a governance culture rooted in trust. Sharing not only the decisions made but also the reasoning behind them demonstrates accountability and respect for campus voices.
- Provide action plans outlining where adjustments have been made.
  - Frame decisions as "We heard X from Y, so we did Z" to ensure stakeholders understand what feedback was given, where specific feedback came from, and how it informed a change in direction.
  - Establish clear, visible milestones that can be celebrated and communicated broadly, building short-term wins. Early successes signal momentum and reinvigorate confidence in the process.
- Ensure transparent follow-up by sharing updates on implementation progress annually, closing the communication loop with all constituencies.

### Conclusion

Midpoint check-ins for strategic plans are essential in higher education, especially now, given the rapidity of change the industry is facing. A successful midpoint strategic plan review relies not only on solid methodology but also on strong communication and transparency. They serve as key tools to ensure long-term plans stay relevant, evidence-based, and aligned with the mission. Successful implementation depends on leadership commitment, a broad stakeholder engagement, systematic data collection, regular communication, and a focus on continuous improvement. Most of all, they require an honest and critical assessment of the current progress and strategies of the institutions. Institutions that follow these guidelines can expect better strategic focus, more effective resource use, and increased stakeholder support for their priorities. Approaching these reviews with transparency, inclusivity, and adaptability helps build stakeholder trust, realign resources, and ultimately improve outcomes for students, faculty, staff, and institutions.

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