



Aligning Performance with Mission: The Integration of Strategy and Advancement

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Presented by:



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Introduction



- Today we are going to talk with you about:
 - ➔ Strategic Plans vs Institutional Planning
 - ➔ Linking Strategy to Advancement
 - ➔ Advancement vs Development
 - ➔ Three Case Studies

Strategic Plans vs. Institutional Planning



- A STRATEGIC PLAN ... typically an institutional mandate of the Board
- STRATEGIC PLANS ... typically unveiled with great fanfare, inclusive but plodding
- WHAT TYPICALLY HAPPENS TO STRATEGIC PLANS? ... All too often, far too little
- MOST STRATEGIC PLANS DO NOT BECOME PART OF THE LIVING, CONTINUOUS, DYNAMIC INSTITUTIONAL PROCESSES

Strategic Plans vs. Institutional Planning



- Today, NEASC is less interested in IF you have a strategic plan, and more interested if dynamic planning is linked to:
 - ➔ A BUDGET
 - ➔ ACADEMIC DECISIONS
 - ➔ REALISTIC OUTCOMES
 - ➔ ACCOUNTABILITY
 - ➔ EXECUTION
 - ➔ RESULTS
 - ➔ CONTINUOUS IMPROVEMENT & FUTURE PLANS

*“PLANS ARE NOTHING. PLANNING IS EVERYTHING”
Dwight Eisenhower, planning the D Day invasion*

Linking Strategy to Advancement



- If you get the difference between plans and planning, congratulations.
- Our experience is folks need assistance dotting the “I’s” and crossing the “t’s” for NEASC.
- Further, most institutions get the linkage to budget and academic decisions, but understand less how advancement helps ... other than as a source of non-tuition revenue to meet budget.
- A sophisticated Advancement function can transform an institution to a high-performer.
- Here’s why advancement needs to be at the table.

Advancement vs. Development



- Advancement
 - ➔ Moving ahead
 - ➔ Improvement
 - ➔ Progress
 - ➔ Development of something

Advancement vs. Development



- Institutional Advancement (IA): Much more than just development
 - ➔ Directing critical moving parts that fuel progress
 - ➔ Alumni, Media, Public, & Government Relations
 - ➔ Communications, Marketing, & Branding

- Development
 - ➔ Simply non-tuition \$\$\$\$

Advancement vs. Development



- IA success requires an IA Plan that:
 - ➔ Is intricately linked to strategic plan and planning
 - ➔ Serves to align the entire institution from within
 - ➔ Provides a compass for external activities
 - ➔ Focuses on:
 - ◆ People,
 - ◆ Process, and
 - ◆ Technology.

Case Studies for Discussion



- Tuition driven college with weak vital statistics including declining enrollment, stiff competition, disengaged alumni, limited fundraising, brand issues, and concerns about direction.
 - ➔ Assessment of advancement function
 - ➔ Roadmap for future
- Public university with proud history but recent decline in enrollment, infrastructure/physical plant, technology, image, and focus on advancement.
 - ➔ Hired VP Advancement as Change Agent
 - ➔ Assessment of Advancement Issues
 - ➔ Development of Realistic Advancement Plan
 - ➔ Successful Capital Campaign

Case Studies for Discussion



- Tuition-driven college on the cusp of revitalization or closing its doors
 - ➔ New leadership team brought in to “save” the college
 - ➔ In contrast to a board out of sync with the realities of the present and wedded to expensive programs that formed the traditional base of the college
 - ➔ An institutional plan lacking support by the board and resulting accreditation problems
 - ➔ An advancement function viewed by the board as solely “fundraising” to bridge the gap between tuition revenue and mounting operating costs and debt
 - ➔ Hammered by the onset of the October 2008 onset of the recession
 - ➔ Ultimately leading to acquisition of the college

Remember ...



“Strategic plans are not enough.”

-- Robert “Skip” Myers

“Institutional advancement is much more than development.”

-- Bernard L. Jennings

“Perfection is not attainable; but if we chase perfection, we can catch excellence.”

-- Vince Lombardi

About the Firm



- Casagrande Consulting was launched in early 2009 as a boutique firm focusing on issues within institutions of higher education and not-for-profit organizations.
- We provide consulting services in the areas of:
 - ➔ Advancement & Development,
 - ➔ Board Effectiveness,
 - ➔ Compensation & Benefits,
 - ➔ Labor Relations,
 - ➔ Performance Management,
 - ➔ Presidential Evaluations, and
 - ➔ Strategy & Planning.
- The consultants at the firm all have a background in working with or for institutions of higher education or not-for-profit organizations at senior executive levels.
- Casagrande Consulting maintains a number of strategic alliances with firms and professionals to ensure that all of our clients' needs are met.
- For additional information about our firm, people, and services, visit our website.

About Our Consultants



- Bernard L. Jennings, Consultant
 - ➔ Bernard has more than 25 years of executive-level private sector and higher education experience, providing management leadership and consulting services to organizations seeking change and growth.
 - ➔ He formerly served simultaneously as the Vice President, Chief Advancement Officer of Morgan State University in Baltimore, MD and as the Executive Director of the University's Foundation. Bernard planned and directed their first ever and highly successful capital campaign; improved advancement operations, marketing, alumni and media relations and upgraded the use of technology in the university's development functions. □
 - ➔ Bernard has expertise in strategic planning, marketing and sales management; government & community relations; public, media, & alumni relations.
 - ➔ Bernard holds a dual M.B.A. in Marketing and International Business from Columbia University and a B.S. in Business Administration and Economics from Morgan State University.

About Our Consultants



■ Robert E. Myers, Ph.D., Consultant

- ➔ Skip is a former college and university CEO and president with more than 30 years leadership experience in public and private sectors.
- ➔ His experience includes stints at large public and private universities with worldwide reach as well as small regional colleges struggling to survive. At University of Maryland University College (UMUC), Dr. Myers served as the “turnaround” interim president as UMUC transitioned in a new strategic direction and grew exponentially worldwide. At Embry-Riddle Aeronautical University-Worldwide, he served as campus chancellor and led efforts to improve academic quality, enhance revenues, and expand the campus’s worldwide market footprint. As president at Daniel Webster College, he engineered with his board a four-year process to ensure the survival of the small, struggling college.
- ➔ Dr. Myers has served as an adjunct faculty member in Journalism, Public Relations, Business Management, and Organizational Leadership. He has served as a member of advisory and operational boards at both the national and local/regional levels, in the private, public, for-profit and non-profit sectors.
- ➔ He holds the B.S. and M.A. in Journalism, and the Ph.D. in Higher Education Policy, Planning and Leadership, with special emphasis on Board Effectiveness, all from the University of Maryland.