



Strategic Planning Case Study

When Capacity Is Limited: Delivering a Comprehensive Academic Strategic Plan

Challenge: A mid-size private professional school sought to develop its first comprehensive strategic plan for academic programs to improve planning and coordination of the school's portfolio and competitive advantage, enrollment management, the student experience, and resource utilization. An external consultant was needed to provide the focused leadership and additional capacity required to advance this initiative without diverting staff and faculty from their core responsibilities, while also helping bridge competing perspectives across the school.

Collaboration: Chris Sax Consulting (CSC) facilitated a comprehensive and inclusive university-wide process including orientations, combined SWOT and SOAR analyses focused on academic programs, and development of a set of five-year goals, objectives, actions, deliverables, and milestones. CSC led all sessions, prepared all documentation of the process, and wrote the draft and final plan. CSC involvement was also extended beyond the scope of the original consulting agreement to conduct ongoing tracking and reporting of the plan's milestones and deliverables. All work was done in collaboration with the Academic Strategic Plan Steering Committee, Faculty Senate, and Provost's office.

Outcomes: A full Academic Strategic Plan was developed in eight months. It was unanimously approved by the Steering Committee, Faculty Senate, Provost's Council, Presidents' Cabinet, and Board of Trustees. In year four of the five-year plan, 91% of the scheduled milestones have been achieved.

Impact: *"Chris quickly became a trusted partner for our school, helping us develop our first strategic academic plan through a smooth process, free of contention, and faster than expected. The quality of the plan and our advancements through its implementation are a direct result of Chris' leadership."* - Provost

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From Stated Values to Visible Action: Demonstrating Institutional Integrity

Challenge: A mid-size public college sought to more clearly and explicitly demonstrate the ways it upholds its institutional values, in response to reputational, cultural, decision-making, and transparency concerns about its new strategic directions. An independent assessment of the extent to which the college lives into its values was needed.

Collaboration: Chris Sax Consulting (CSC) used an appreciative inquiry approach to engage and document the perspectives of staff, administrators, faculty, students, alumni, board members, and external partners and community stakeholders. CSC then conducted a Values in Action Audit using a structured framework and tool. CSC produced a report for the President and Board of Directors that 1) identified the activities, services, policies, processes, practices, spending allocations, and engagements that demonstrated the institution was upholding each of its stated values, 2) noted areas of potential gaps, and 3) recommended improvements in stakeholder communications.

Outcomes: The report was made available to stakeholders. Communications were enhanced to more explicitly and frequently point out the ways the institution lives its values through decision-making, planning, budgeting, and operations. The President convened a task force to explore the areas of potential gaps for inclusion in the institution's strategic plan.

Impact: *"Chris Sax Consulting helped us navigate a particularly rough time. Throughout the project, Chris balanced and fairly represented the perspectives of all involved, and produced an objective and honest report that both affirmed the institution's strengths and pointed out areas in need of improvement. We are also seeing parallel and additional benefits from the values in action audit – a strengthening of our accreditation self-study and grant applications."* – President and Chief Executive Officer



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Building Campus Readiness for a New Strategic Planning Model

Challenge: A small private university sought to use a new approach to develop its next three-year strategic plan. Previous plans were developed centrally by executive administration while the next plan would be developed by an inclusive university-wide process, with which many staff and faculty were unfamiliar. An external consultant was needed to assist with institutional readiness for this change.

Collaboration: Chris Sax Consulting provided multiple educational sessions open to all staff, faculty, and administrators. *From Ideas to Impact: Understanding Strategy So You Can Shape It* was offered before the strategic planning process began to introduce the community to the benefits and mechanics of the new process. Once the strategic plan was completed and approved, the workshop *From Plan to Practice: Connecting Your Daily Work to the University's Strategy* was conducted for employees to emphasize individuals' roles in implementing and achieving the plan.

Outcomes: For the pre-planning orientation, there was a 40% increase in understanding about the new process, from pre-test to post-test. For the post-planning workshop, there was a 32% increase in awareness and understanding of the elements of the approved strategic plan. In addition, workshop participants developed individualized concrete statements and plans linking their daily operational responsibilities and tasks to the goals, objectives, and actions of the strategic plan.

Impact: *"Chris' practical training and down-to-earth demeanor well-prepared front-line staff and faculty to engage in the new process. And her workshop converted the final strategic plan from a theoretical document to a living document, with employee and plan mutually guiding each other daily."* – Associate Vice President, Planning and Effectiveness

