

Planning Our Future By Honoring Our Past



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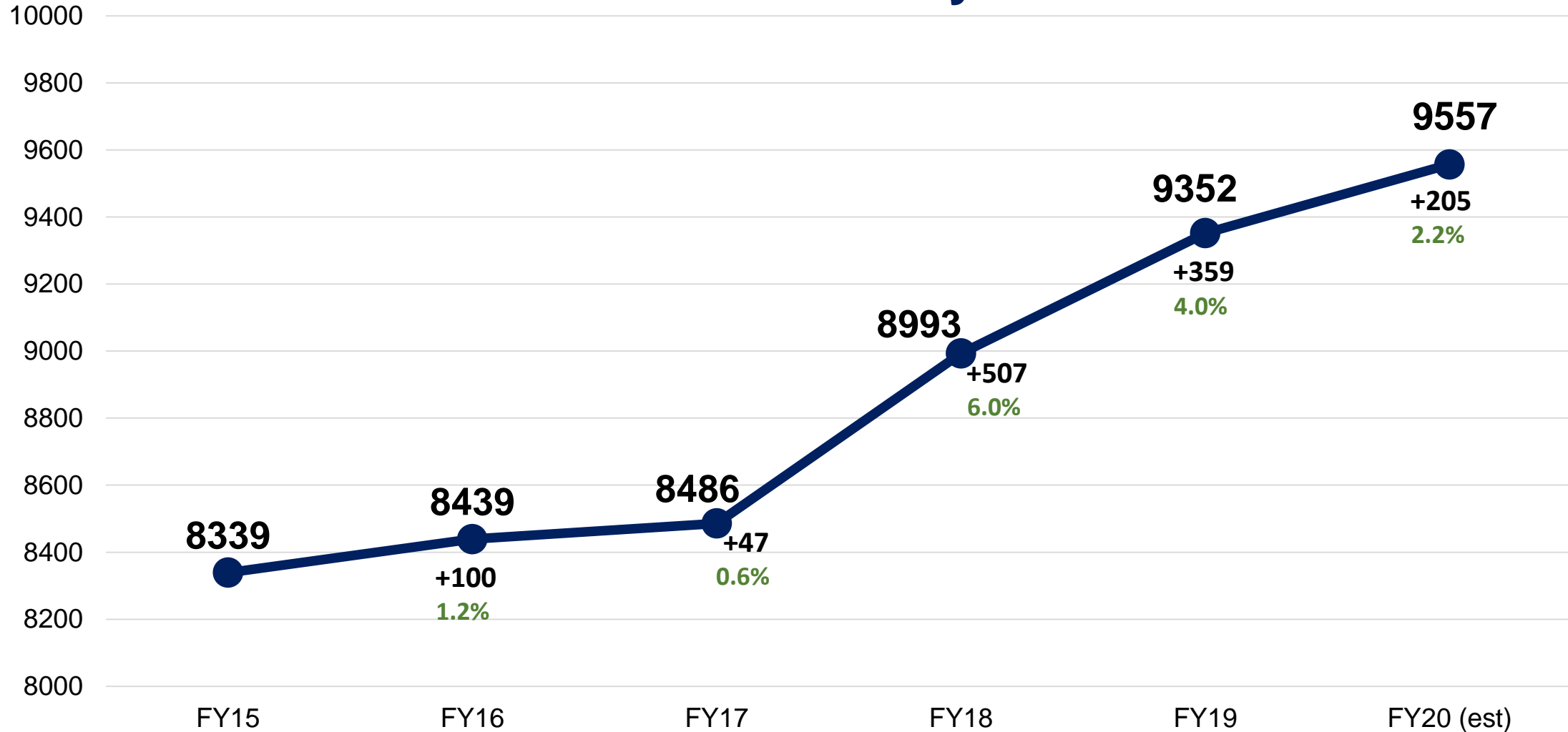
Today's Presentation

- Institutional Overview
- Why Is A New Strategic Plan Needed?
- New Planning Approach: Core Values at the Center
- Communication and Engagement Strategies
- Lessons Learned
- Q & A Session

Stockton University Main Campus 2018



Annualized Headcount by Fiscal Year



Headcount change (annualized) over past five years: +12%

Atlantic City Gateway Project Spring 2016



Atlantic City Gateway Project Spring 2016



Stockton University
Residential Building

South Jersey Industries
Headquarters &
Parking Garage

Stockton University
Academic Building

Atlantic City Gateway Project Fall 2018



Atlantic City Gateway Project Fall 2018





The Case for Growth



Locations

New Jersey Public Colleges & Universities



The Case For Growth

Internal

- For years, Stockton was known as a “best-kept secret”
- Two-thirds of our student population comes from South Jersey
- Shifting population trends do not favor our region
- Stockton is the least diverse of the 9 senior public institutions in NJ

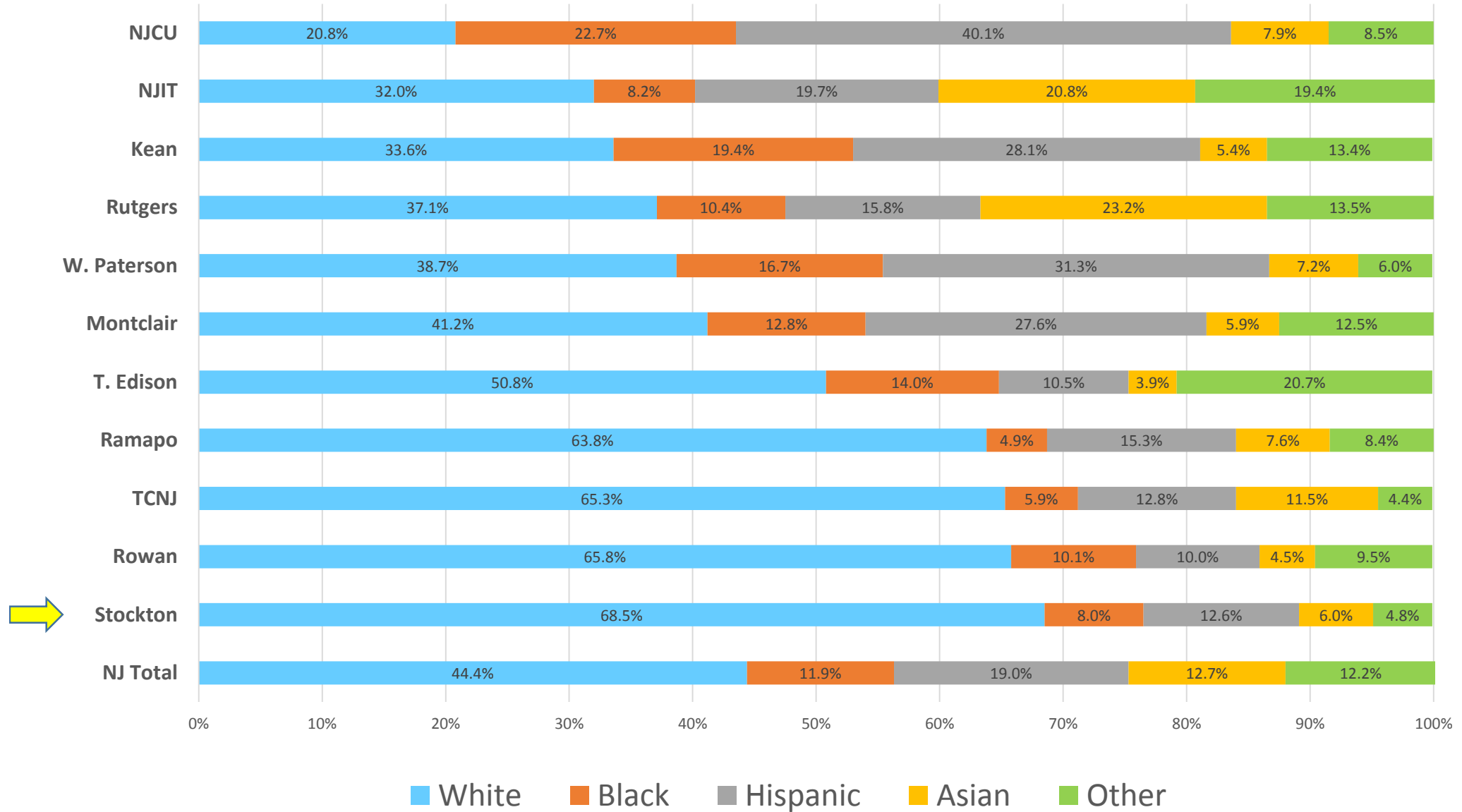
The Case For Growth

- New Jersey is the #1 exporter of college students in the U.S.
- Senior public institutions are being tasked with reversing trend
- State's economic health is directly tied to Atlantic City
- Stockton designated as “Anchor Institution” for the AC region
 - Support and influence local economy
 - Help attract a diverse, educated workforce
 - Support artistic and cultural opportunities
 - Work with community partners and private sector allies to broaden economic development activities

The Case For Diversity

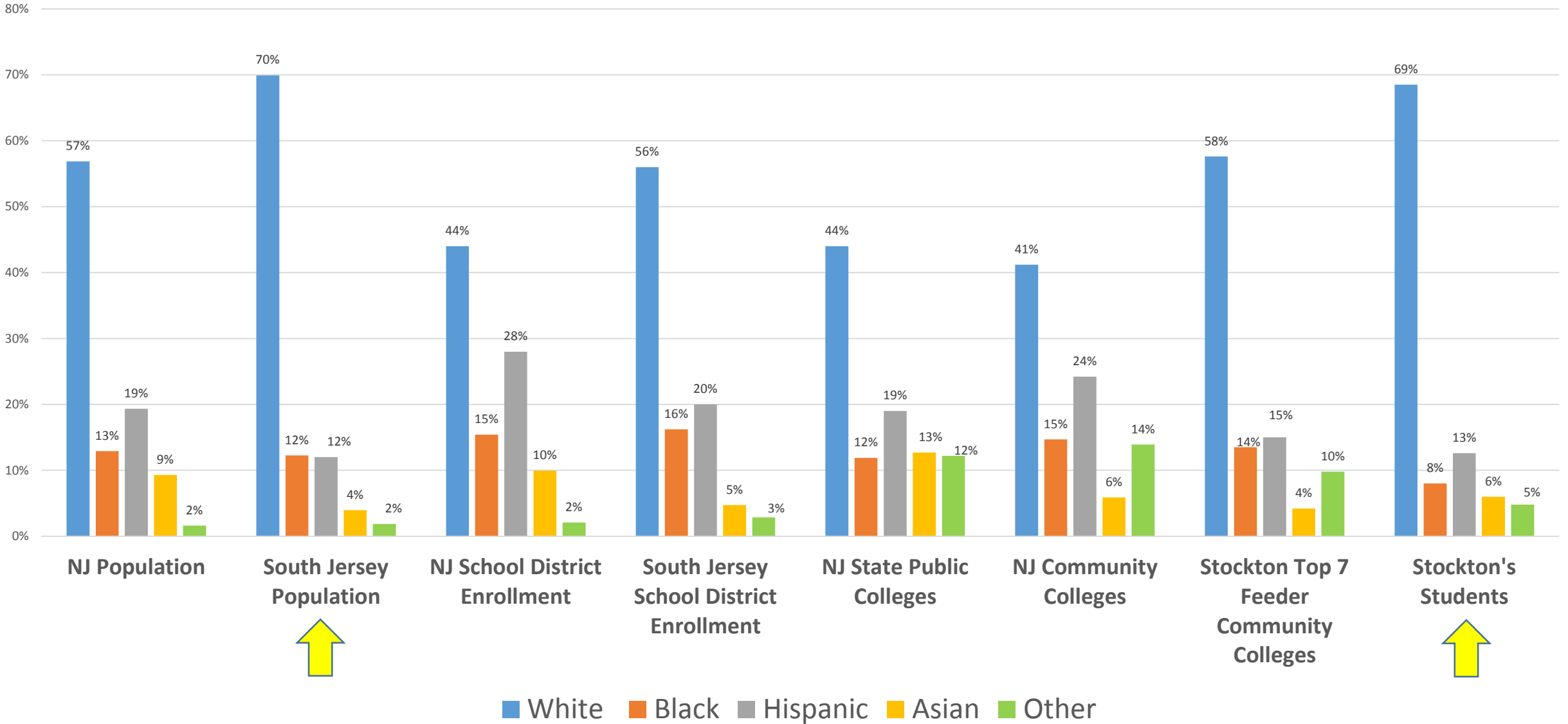
- Hispanic and Asian high-school populations will dramatically increase
- New Jersey's overall population is ageing
- 30% of Stockton's students identify as racial minorities
- ~55% is the average for New Jersey's four-year public higher education institutions
- 13% of Stockton's undergraduates are 25 or older
- 21% average for New Jersey's four-year public higher education

Undergraduate Student Race/Ethnicity Diversity (Fall 2017)



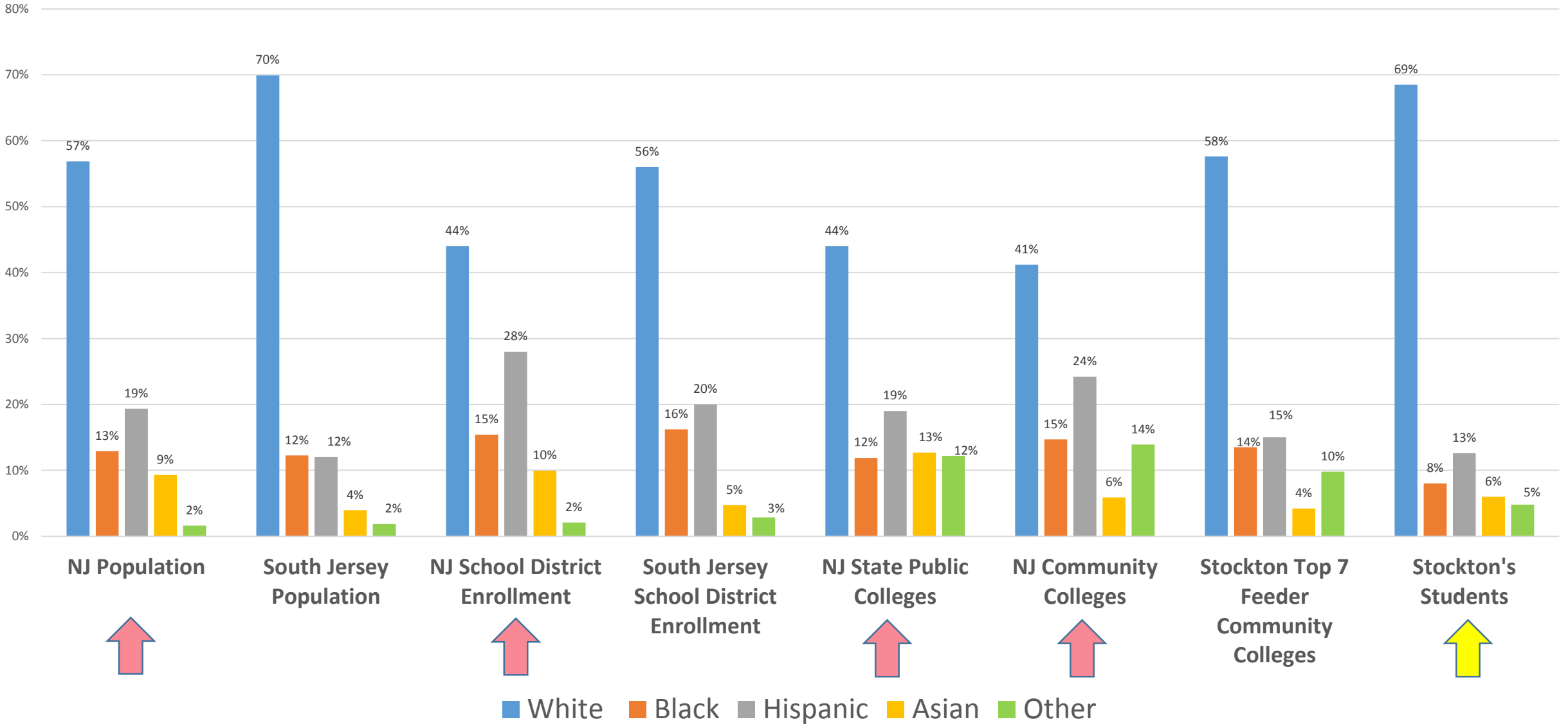
Source: New Jersey Office of the Secretary of Higher Education

NJ Demographics Compared with Stockton



Source: New Jersey Office of the Secretary of Higher Education

NJ Demographics Compared with Stockton



Source: New Jersey Office of the Secretary of Higher Education

New Strategic Plan

- **2008: Stockton began its 20/20 strategic planning process**
 - Internally-led process
 - Used a Balanced Scorecard approach; created four “LEGS” themes
- **2012: Middle States reaccreditation visit**
 - Two recommendations, including one relating to strategic planning
- **2015 – 2017: New efforts**
 - Reactivated Chief Planning Officer role
 - Began more holistic and intentional strategic planning process
 - Began discussing sunseting of 20/20 process and future planning ideas

New Strategic Plan

- **Summer & Fall 2017: New planning efforts**
 - *“Build a plan ourselves or partner with a consulting firm?”*
 - We wanted an outside perspective, factoring in long-term growth plans
 - We also wanted to balance thoroughness with efficiency
- **December 2017: Hired DumontJanks as our partner**
 - Gregory and Lauralyn embodied the attitude and commitment to a liberal arts education Stockton wanted
 - Formation of Strategic Planning Steering Committee & timeline (handout)

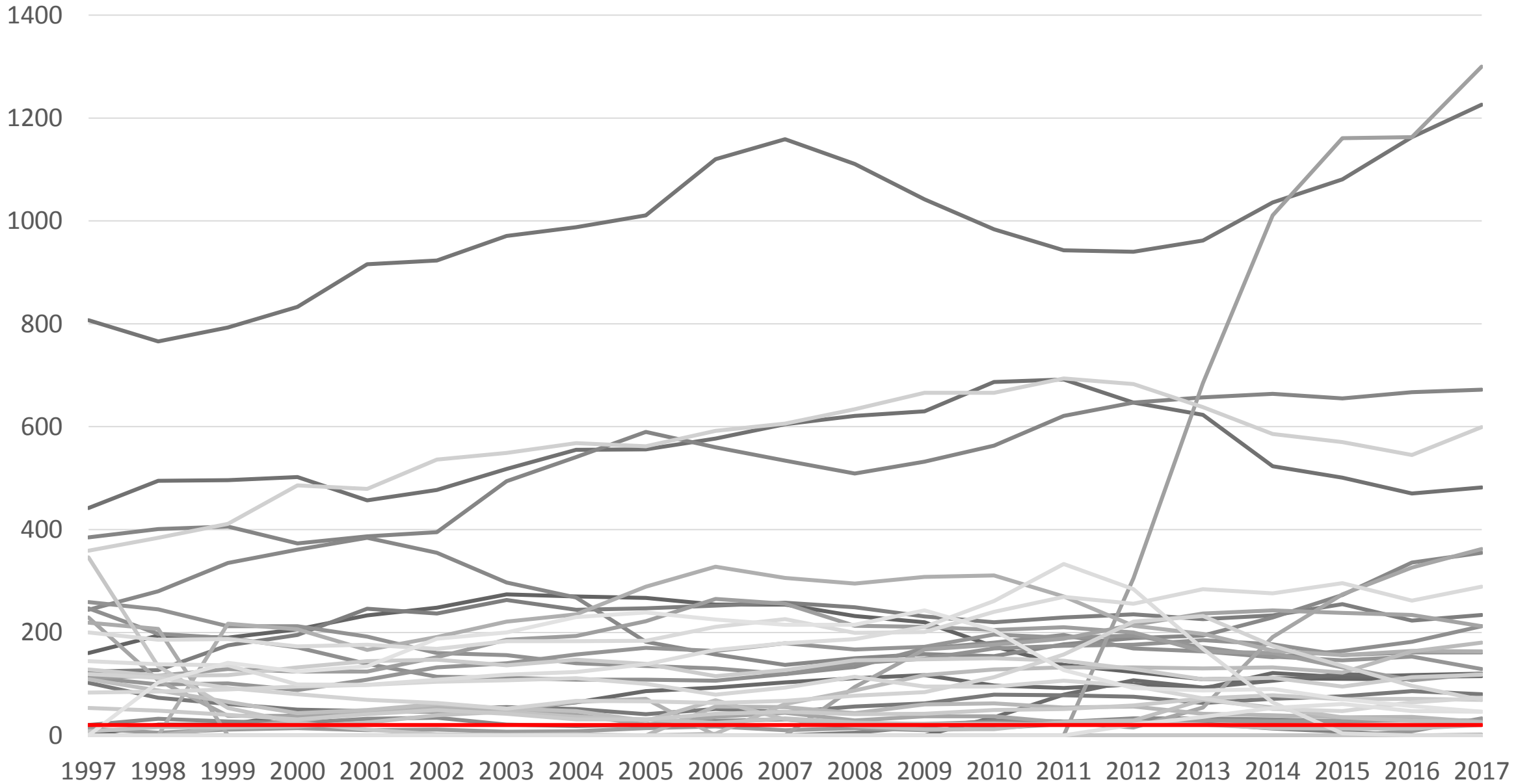
New Planning Approach



Analyses

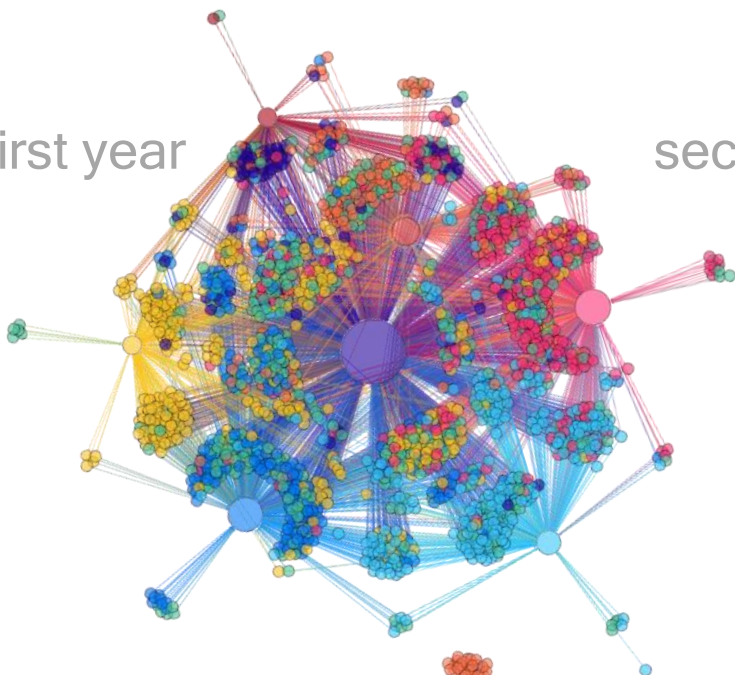
- Enrollment trends
- Academic Programs
- Collaboration Survey
- SWOT Analysis
- Financial Model
- Preliminary Themes

Programs Historic UG Fall Enrollments By Program 1997- 2017

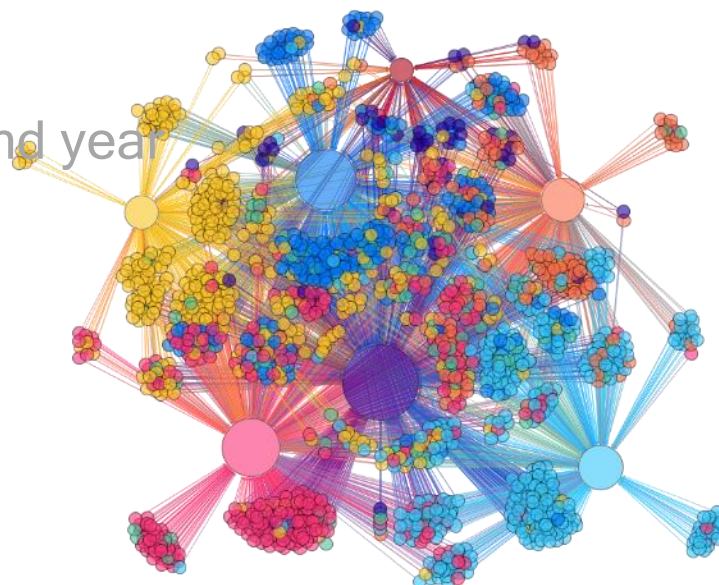


Course Enrollment Fall 2017

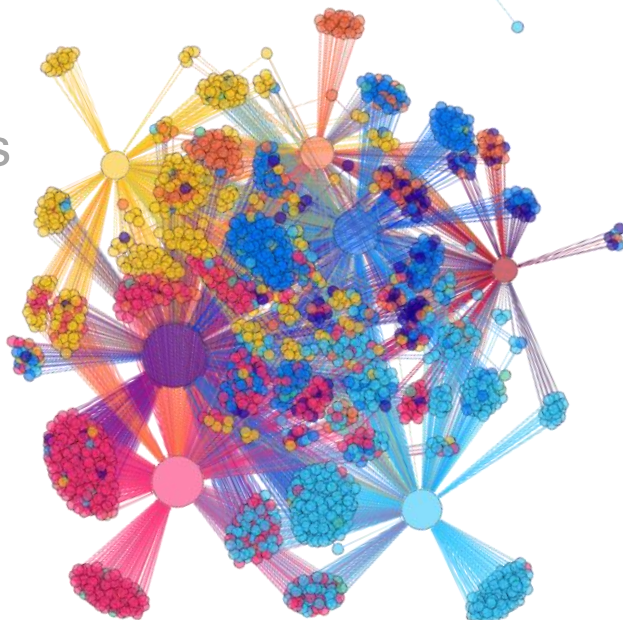
first year



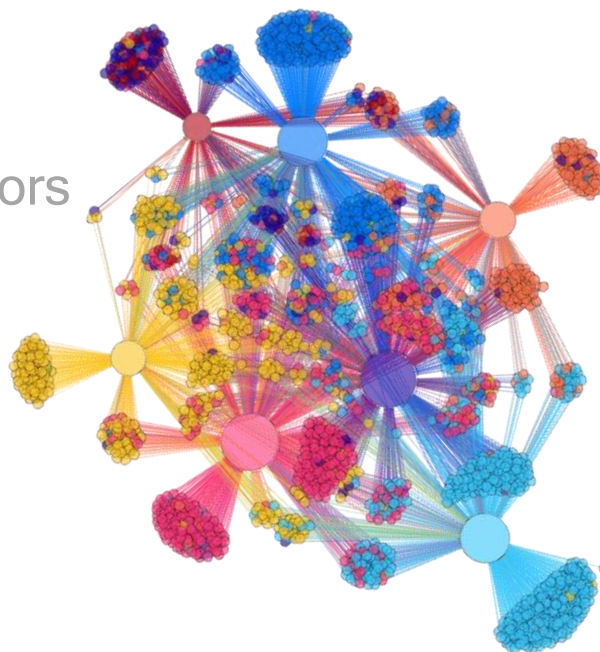
second year



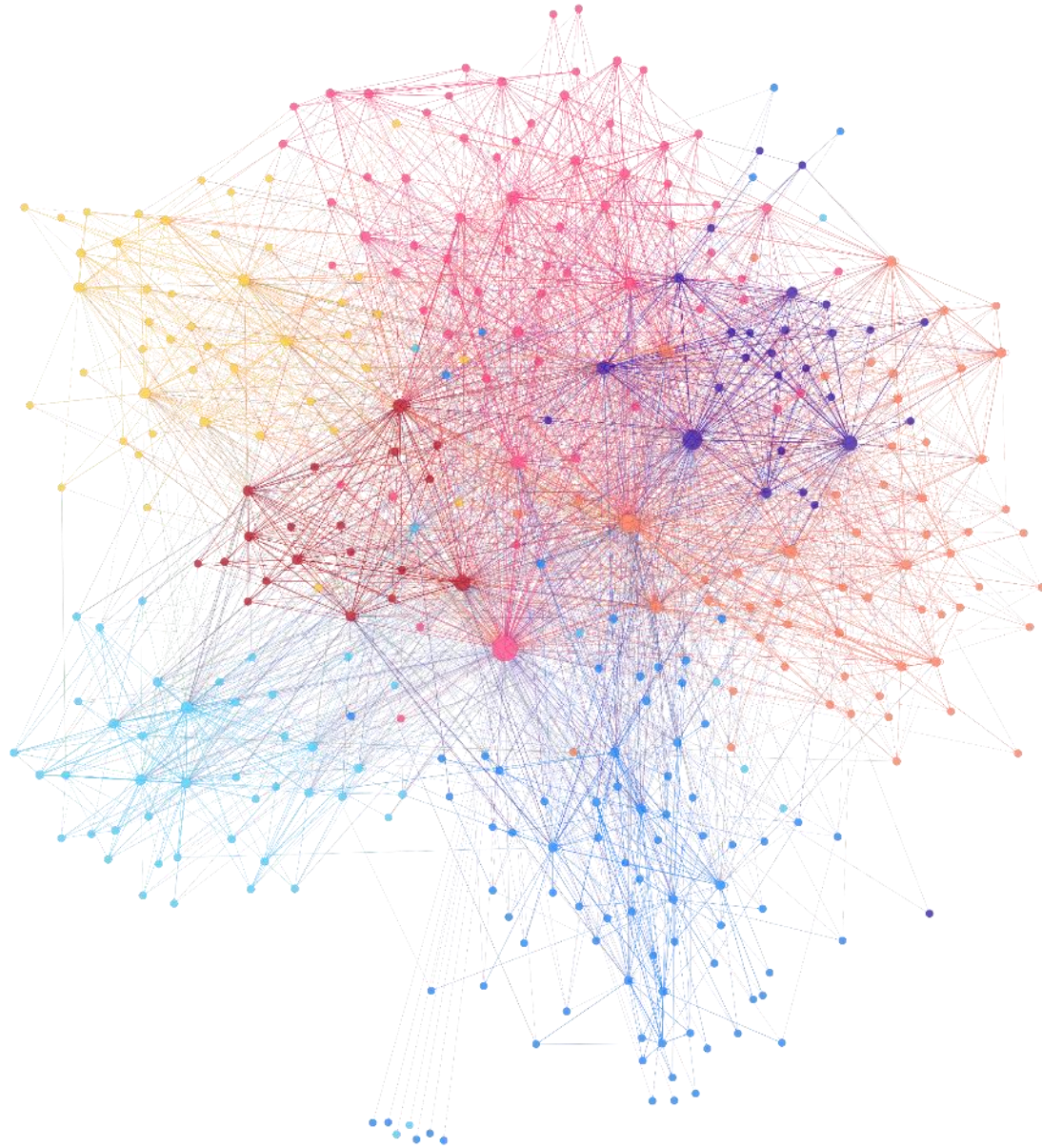
juniors



seniors

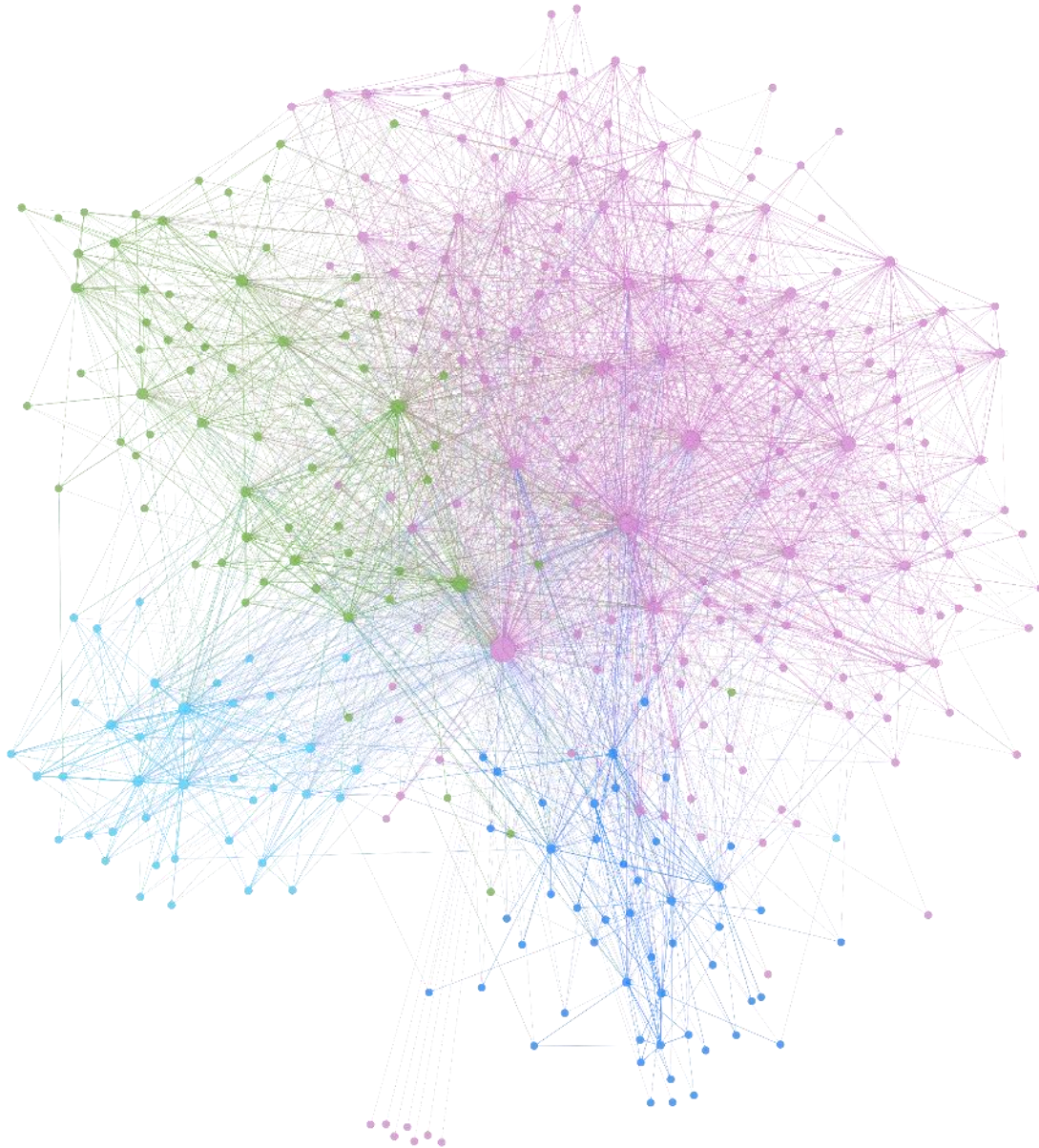


Collaboration Survey Faculty Collaboration with Other Faculty



- School of Social & Behavioral Sciences
- School of Business
- School of Health Sciences
- School of Natural Sciences & Mathematics
- School of Arts & Humanities
- School of General Studies
- School of Education

Collaboration Survey Faculty Collaboration with Other Faculty - Communities



Modularity found 2 communities containing more than 1 school:

- Community 1: School of Social and Behavioral Sciences, School of General Studies, School of Arts and Humanities
- Community 2: School of Health Sciences, School of Education

SWOT – Summary



STRENGTHS

WEAKNESSES

OPPORTUNITIES

THREATS



FINANCIAL MODEL

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Clipboard Font Alignment Number Styles Cells Editing

L25

	A	B	C	D	E	F	G	H	K	L	M	N
1	Five Year Model											
2	Stockton University											
3												
4		Original	Revised	Feb Rev								
5		FY18	FY18	FY18	FY19	FY20	FY21	FY22				
6	Undergraduate Tuition Increase	<u>2.5%</u>	<u>2.5%</u>	<u>2.5%</u>	<u>2.5%</u>	<u>2.0%</u>	<u>2.0%</u>	<u>2.0%</u>				
7	Graduate Tuition Increase	<u>2.5%</u>	<u>2.5%</u>	<u>2.5%</u>	<u>2.5%</u>	<u>2.0%</u>	<u>2.0%</u>	<u>2.0%</u>				
8	Doctoral Tuition Increase	<u>2.5%</u>	<u>2.5%</u>	<u>2.5%</u>	<u>2.5%</u>	<u>2.0%</u>	<u>2.0%</u>	<u>2.0%</u>				
9												
10	Fee Increase	<u>2.5%</u>	<u>2.5%</u>	<u>2.5%</u>	<u>2.5%</u>	<u>2.0%</u>	<u>2.0%</u>	<u>2.0%</u>				
11												
12	Enrollment Increase											
13	Undergraduate (must type in Rates worksheet)	<u>3.0%</u>	<u>3.0%</u>	<u>3.0%</u>	<u>4.5%</u>	<u>3.6%</u>	<u>3.0%</u>	<u>3.0%</u>				
14	Graduate	<u>3.0%</u>	<u>3.0%</u>	<u>3.0%</u>	<u>2.0%</u>	<u>2.0%</u>	<u>2.0%</u>	<u>2.0%</u>				
15	Doctoral	<u>2.0%</u>	<u>2.0%</u>	<u>0.0%</u>	<u>0.0%</u>	<u>0.0%</u>	<u>0.0%</u>	<u>0.0%</u>				
16												
18	Housing Occupancy	<u>98.0%</u>	<u>98.0%</u>	<u>96.0%</u>	<u>96.0%</u>	<u>96.0%</u>	<u>96.0%</u>	<u>96.0%</u>				
19												
22	Fund balance on (100%) off (0)		<u>100.0%</u>									
23	Program Review Requests on (100%) off (0)		<u>0.0%</u>									
24	Program Review Capital Requests on (100%) off (0)		<u>0.0%</u>									
25	Housing Occupancy increase/decrease											
26	Total (University and Aux and Agency)											
27	Undergraduate Tuition Increase Estimate											
28	Fee University impact											
29	Graduate/Doctoral											
30												
31		FY18 Original	FY18 Revised	FY19	FY19	FY20	FY21	FY22				
32	Revenues											
33	University	\$ 180,804,121.24	\$ 175,485,441.14	\$ 172,007,700.04	\$ 191,907,600.57	\$ 190,284,778.22	\$ 106,248,890.04	\$ 202,741,055.01				

Themes

ACADEMIC

faculty
interdisciplinarity
programs

CULTURE

history
community
diversity
structure
geography

RESOURCES

financial
space
staff
services

The Stockton Idea (William Daly)

Stockton proposed to make available to state college students at state college prices the kind of interdisciplinary and individualized liberal arts instruction initially developed in America for the children of the ruling elite and, in the contemporary world, usually reserved for students at the most exclusive and expensive private liberal arts colleges.

In other words, what was arguably the best and most expensive undergraduate education in the country was to be delivered to the students who most needed it but who also could least afford it and (as a number of early critics argued) might also be the least prepared for it and the least interested in it ... And the economic situation of many state college students and their parents was likely to place them generally in the career-oriented camp. They were unlikely to be attracted to a college that preached the civilizing impact of liberal arts education unless it could be demonstrated that such an education would also contribute directly to career success and economic gain.

A Plan for Stockton's Next Five Years

The University's founders faced the challenge of defining and implementing the Stockton Idea for a relatively small single-college campus. The task now is to translate this idea so as to bring the same vision and values to a much larger multi-campus university.

What is Needed?



An infrastructure to support decision making

Six Key Initiatives

- Inclusive Student Success
- Diversity and Inclusion
- Teaching & Learning
- Strategic Enrollment Management
- Financial Sustainability
- Campus Community, Communication, and Shared Governance

Inclusive Student Success

- Counseling, advising, belonging
- Equity in access
- Recruit and retain under-represented & non-traditional students, staff, and faculty
- Authentic and inclusive communications
- Resource allocations

Diversity and Inclusion

- Recruiting, hiring, and retaining diverse faculty and staff
- Build enrollment strategies to reach more diverse student population
- Ensure access to sufficient resources
- Restructure institutional aid to better address financial need
- Create culturally-affirming learning opportunities

Teaching & Learning (as prime mover)

- Pedagogy
- Diversity
- Workforce
- Technology
- Class size
- Faculty

Strategic Enrollment Management

- Enrollment targets
- Communication
- “Value” of Stockton Experience
- Partnerships (including international)
- Linking undergraduate and graduate (4+1, 3+2, etc.)

Financial Sustainability

- Integrated Planning
- Zero-Based Budget
- Target Enrollments
- Financial Aid
- Space/Time Management
- Master Plan Update and Capital Investment Strategy
- Increase Liquidity + Operating Margin + Debt Service Ratio
- Strategic Partnerships
- Fundraising Campaign
- Additional Revenue Sources

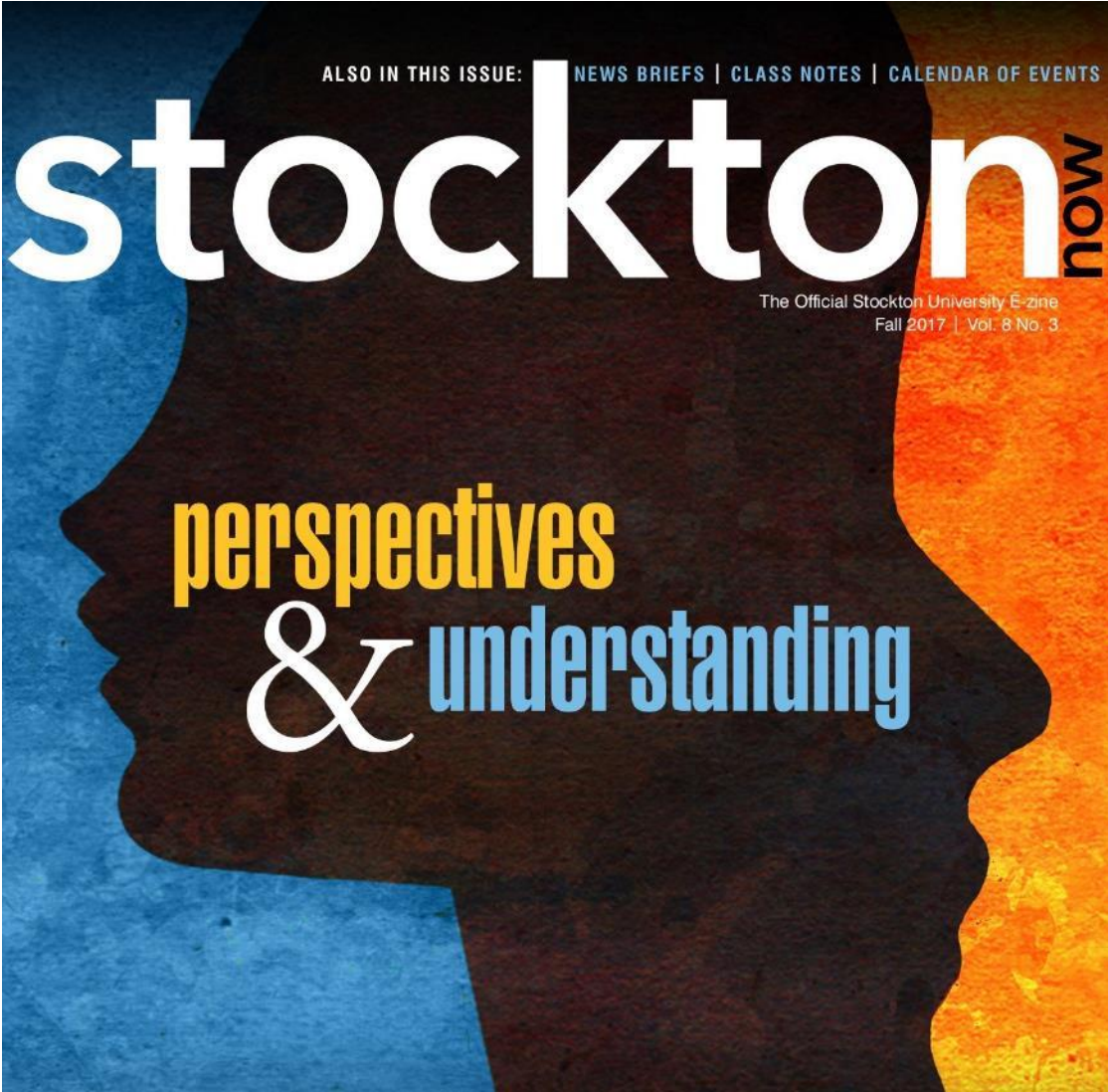
Campus Community, Communication, and Shared Governance

- Evaluate current organizational structures
- Focus on communication
- Share institutional updates and collectively assess strategic planning process
- Empower students, staff, faculty, and administration to share in the governance of Stockton

Sustained Commitments

- Academic experience
- Faculty
- Staff
- Student experience
- Alumni and other stakeholders
- Role as Anchor Institution
- Safety and security
- Reputation and brand recognition

Implementation



Task 1: Inclusive student success

Task 2: DATA COLLECTION, ANALYSIS, & PLANNING

Task 2a: Pedagogy

Task 2b: Enrollment by program

Task 2c: Financial analyses

Task 2d: Physical planning



Task 3: Integrated model



Task 4: Adjust organizational structures

“UMBRELLA” IMPLEMENTATION TEAM



ACADEMIC AFFAIRS



Academic
Organization



Pedagogy



SEMP



Inclusive
student success



Enrollment



Cost &
capacity



Budget



A&F



Admin
Organization



Master
plan



F&O





YEAR 1
(AY 19-20)

YEAR 2
(AY 20-21)

YEAR 3
(AY 21-22)

YEAR 4
(AY 22-23)

YEAR 5
(AY 23-24)

**INCLUSIVE
STUDENT SUCCESS**

**DATA & ANALYSIS:
Pedagogy**

**DATA & ANALYSIS:
Enrollment by Program**

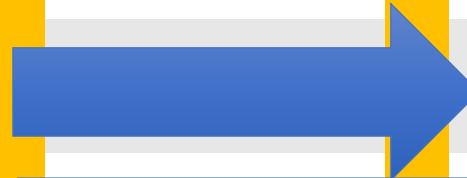
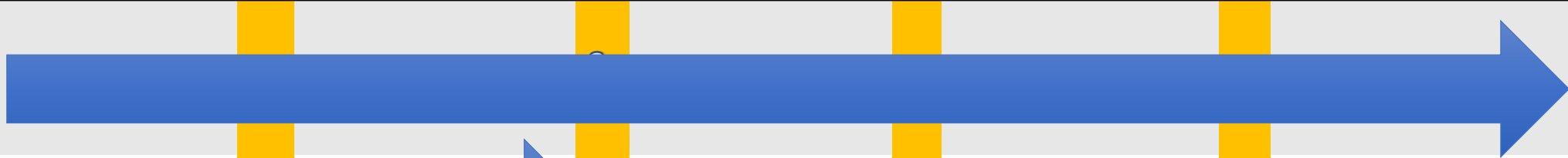
**DATA & ANALYSIS:
Financial Analysis**

**DATA & ANALYSIS:
Facilities Assessment**

**DATA COLLECTION:
Org Structures**

INTEGRATED MODEL

**DECISIONS
Org Structure, Growth**



INITIATIVE: FINANCIAL SUSTAINABILITY	YEAR 1 (AY 19-20)		YEAR 2 (AY 20-21)		YEAR 3 (AY 21-22)		YEAR 4 (AY 22-23)		YEAR 5 (AY 23-24)
STATE FUNDING	<ul style="list-style-type: none"> ➤ Activity ➤ Responsible persons ➤ Metric/means of evaluation 	A S S E S S	<ul style="list-style-type: none"> ➤ Activity ➤ Responsible persons ➤ Metric/means of evaluation 	A S S E S S	<ul style="list-style-type: none"> ➤ Activity ➤ Responsible persons ➤ Metric/means of evaluation 	A S S E S S	<ul style="list-style-type: none"> ➤ Activity ➤ Responsible persons ➤ Metric/means of evaluation 	A S S E S S	<ul style="list-style-type: none"> ➤ Activity ➤ Responsible persons ➤ Metric/means of evaluation
ZERO-BASED BUDGETING	<ul style="list-style-type: none"> ➤ Activity ➤ Responsible persons ➤ Metric/means of evaluation 		<ul style="list-style-type: none"> ➤ Activity ➤ Responsible persons ➤ Metric/means of evaluation 		<ul style="list-style-type: none"> ➤ Activity ➤ Responsible persons ➤ Metric/means of evaluation 		<ul style="list-style-type: none"> ➤ Activity ➤ Responsible persons ➤ Metric/means of evaluation 		<ul style="list-style-type: none"> ➤ Activity ➤ Responsible persons ➤ Metric/means of evaluation
MASTER PLAN & SPACE USE	<ul style="list-style-type: none"> ➤ Activity ➤ Responsible persons ➤ Metric/means of evaluation 		<ul style="list-style-type: none"> ➤ Activity ➤ Responsible persons ➤ Metric/means of evaluation 		<ul style="list-style-type: none"> ➤ Activity ➤ Responsible persons ➤ Metric/means of evaluation 		<ul style="list-style-type: none"> ➤ Activity ➤ Responsible persons ➤ Metric/means of evaluation 		<ul style="list-style-type: none"> ➤ Activity ➤ Responsible persons ➤ Metric/means of evaluation
CAPITAL INVESTMENT STRATEGY	<ul style="list-style-type: none"> ➤ Activity ➤ Responsible persons ➤ Metric/means of evaluation 		<ul style="list-style-type: none"> ➤ Activity ➤ Responsible persons ➤ Metric/means of evaluation 		<ul style="list-style-type: none"> ➤ Activity ➤ Responsible persons ➤ Metric/means of evaluation 		<ul style="list-style-type: none"> ➤ Activity ➤ Responsible persons ➤ Metric/means of evaluation 		<ul style="list-style-type: none"> ➤ Activity ➤ Responsible persons ➤ Metric/means of evaluation
Establish a plan to INCREASE LIQUIDITY	<ul style="list-style-type: none"> ➤ Activity ➤ Responsible persons ➤ Metric/means of evaluation 		<ul style="list-style-type: none"> ➤ Activity ➤ Responsible persons ➤ Metric/means of evaluation 		<ul style="list-style-type: none"> ➤ Activity ➤ Responsible persons ➤ Metric/means of evaluation 		<ul style="list-style-type: none"> ➤ Activity ➤ Responsible persons ➤ Metric/means of evaluation 		<ul style="list-style-type: none"> ➤ Activity ➤ Responsible persons ➤ Metric/means of evaluation

Communication Plan

- Identify communications leader
- Identify and define audiences (key influencers, stakeholder mapping, tiering)
- Identify, recruit, and train messengers
- Identify communication modes and engagement tools
- Conduct regular review and ensure integration

Lessons Learned



Lessons Learned

- Shared governance requires time
- You may not have the data you think you have (and a big part of our plan became about organizing to get this data)
- The biggest obstacles may not be what they seem (i.e. strategic planning is group therapy)
- Strategic planning is academic planning is financial planning
- At some point, you have stop talking, and start doing

Fall 2018 – Spring 2019

- Leadership for finalization of strategic plan and its implementation transitioned to the Provost in Fall 2018
- Fall 2018: 7 School meetings co-presented by President and Provost
- Website, e-mail address, and 10 open forums to solicit feedback
- Revised draft completed in March 2019

Fall 2018 – Spring 2019

- May and June 2019: Six Learning Sessions resulted in proposed goals for implementation teams to consider
- Faculty Senate reviewed the new draft of the Strategic Plan at May Retreat; had no substantive suggestions for revision
- Provost will consult with the Steering Committee and Faculty Senate to create implementation teams to begin work in Fall 2019

Questions & Answers

