

A FOUR PAGE Strategic Plan

EVEN AFTER CONCLUDING a strategic-planning process and a successful capital campaign, no one at Colby-Sawyer College could give me a current, complete copy of the college's strategic plan when I became president four years ago. The proffered versions came out of the bowels of a filing cabinet and were longer than a typical doctoral dissertation. Most staff members really weren't using the plan, and those who hadn't buried the document didn't even know one existed. In functional terms, *there was no strategic plan.*

As the college set out to create a new strategic plan, we received valuable advice from former board chair Charles

*A model of economy and clarity, the plan
has every member of the campus
on the same page.*

J. Lawson. He counseled that to be successful and useful the plan would need to be succinct and have measurable indicators to evaluate progress. The current board chair, William H. Dunlap, and I knew that Colby-Sawyer would fare best if trustees, administrators, faculty, and staff were clear

about the college's priorities. And so we set out to determine those priorities in a way that would enable us to mobilize and inspire the efforts of everyone at the college. In the end, we determined that a four-page document would be accessible, cogent, and straightforward.

Today, if you visit our New Hampshire campus, anyone can tell you what we are trying to accomplish. The four-page strategic plan is in its third annual update. We

• BY ANNE PONDER • use it to communicate and to lead the college. Copies appear on office

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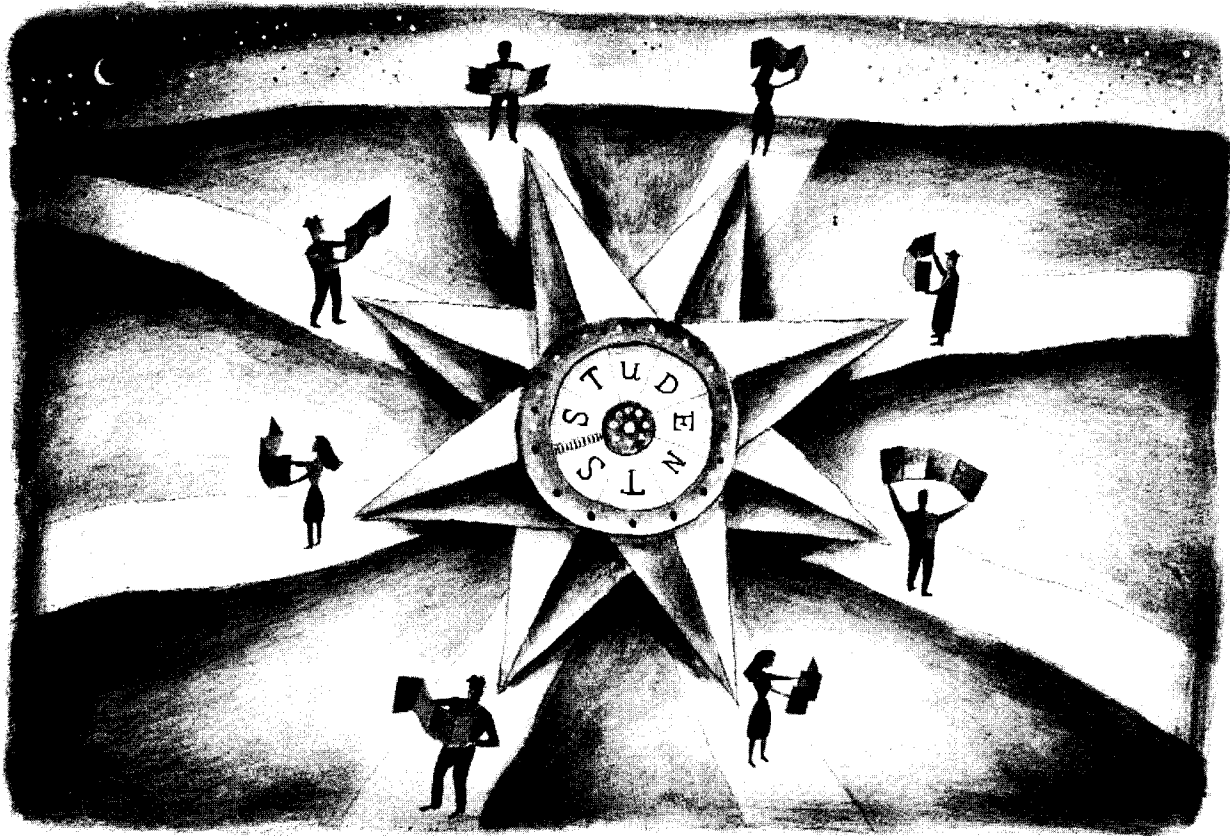


Illustration by John S. Dykes

bulletin boards, in the top drawers of desks, and clipped into weekly planners. Human-resources staff members hand out copies to job finalists. Everyone at the college knows we have a plan and what it contains.

The plan is part of each board book, and trustees use it to check progress toward our benchmarks, which we update every year. When they read an enrollment report or an annual-fund gift chart, they easily can determine whether we are achieving our aims. The benchmarks keep trustees away from the gory details and enable them to focus on trends concerning our performance in relation to the plan.

Since our first iteration of this four-page plan, we have a new board chair. Fifty percent of our trustees are new. We have hired 94 new employees. And we are still “on the same page” as a college when it comes to what is important.

How did we do it? To begin the process, I held a series of small-group meetings, which we called our SWOT meetings. This plan-

ning procedure allowed us to discuss the college’s Strengths, Weaknesses, Opportunities, and Threats. The meetings took place over several months and included every college employee—without exception—including those who worked for the firm that contracts our food service, maintenance, and other services. If someone held a job that affected our students in any way, we wanted to know what he or she thought. From these conversations, I summarized, winnowed, and distilled ideas into draft goals for our consideration.

When the series of meetings was complete and the input collated, we had a comprehensive and clear picture of what our community considered to be the most important strengths, weaknesses, opportunities, and threats influencing the institution. We then disseminated the information as a draft to everyone who had participated in the meetings, as well as to the board, and encouraged them to respond. We wanted to make sure that the draft plan had its priorities in order, that we had not overlooked anything, that

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we had chosen the proper benchmarks to gauge our progress, and that we had heard clearly what was said. Working with some board and senior staff members, I refined the draft and polished our four-page strategic plan.

Our Eyes and Ears. The SWOT meetings were valuable for several reasons. It was enlightening, for example, to hear what one of our safety officers thought the college could do to improve student retention. It was eye opening to hear from an administrative assistant what we might do to garner more interest in one of our academic majors. And it was equally instructive to hear an idea from a faculty member concerning improved hometown publicity for our student-athletes. Many people were eager to offer ideas, and the small-group setting encouraged them to come forward.

A secondary benefit of the meetings was the positive interaction of people who normally do not work together. They got to know one another personally, learn a little about what others do each day on the job, and understand other perspectives on our work together.

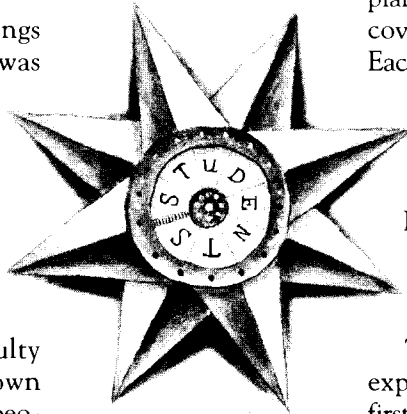
Working on the theory that the strategic plan must remain contemporary with the goals and needs of the institution, we held a second series of SWOT meetings when we began to prepare for the college's upcoming capital campaign. We modeled the meetings after the first series and again included every college employee. Having previously gone through the process, many were well prepared for the second round, and these meetings were even more productive than the first

series. Again, we reported the results to the college community and to the trustees, and we updated the plan to reflect these new findings.

A Navigational Tool. The four-page strategic plan is a model of economy and clarity. On the cover page is an eight-pointed mariner's star. Each point of the star represents a critical area of the institutional universe: curricular quality, faculty and staff, college size, finances, external affairs, fund-raising, facilities, and campus life. In the center of the star is another smaller, eight-pointed mariner's star that touches each point of the larger star. Its center contains one word—students.

The second page contains paragraphs explaining the three institutional goals. The first is "Quality of Our Learning Community." Already a strong college, we think we can become an even higher quality institution in academic terms. To accomplish this, the plan states that we will explicitly articulate the joys of academic rigor and achievement. We will expect our students to be liberally educated, know their fields, and be confident that they know how to learn. Everyone agrees that Goal One is paramount.

The second institutional goal is "Financial Strength of the College." This is an integral part of the plan because a stronger financial base—both within the operating budget and with a growing endowment—will give the college significant advantages. The goal calls for the college to balance the budget every year, to reach its enrollment and retention targets, to moderate the proportion of tuition it discounts, to grow the endowment, to create a larger percentage of unrestricted assets, and to achieve a high degree of effectiveness in all



aspects of fund-raising. We can measure all of these elements and track our progress through our benchmarking system.

The third institutional goal is "Focusing Our Niche." By doing this, we expect to boost our enrollment and development efforts. Achieving this goal will allow us to market the college's distinctiveness and position it competitively, bring the college to greater prominence, reach certain targeted segments among prospective students, and make a more persuasive case for philanthropic involvement by constituents and friends of the college.

In focusing our niche, a most significant issue was the question of whether to increase our size. At every step of the way in our deliberations, we tested our projections and assumptions against the strategic plan. When we plugged in an enrollment assumption, we were able to evaluate its potential effect on every facet of the college. Most important, the strategic plan helped us get to the essential issue—what was best for our students.

"Even though the plan has 28 empirical measurements," points out Board Chair Dunlap, "it has not caused the college to be numbers-driven. Rather, the numbers are simply a catalyst to help us think about the quality of student experience. In the end, the board concluded that the quality of a Colby-Sawyer education would be enhanced by our becoming a modestly larger place."

Measuring the Benchmarks. The 28 benchmarks are listed on the last two pages of the plan. Across the top of the table is the year of measurement for each benchmark. The table makes it easy to see where we are enjoying suc-

cess, what areas we need to watch, and where we need to improve. Down the side of the table are the benchmarks themselves. Among the 28 subjects are student matriculation, financial aid, total expense, four-year and five-year graduation rates, fall-to-fall retention rates, average class size, academic support, faculty salary rank, annual-fund giving, and endowment-to-debt ratio. For the previous and current years, the measurements listed are known. For the upcoming year, the measurements listed are projected or recommended, and for the year following that, the measurements are projected subject to adjustment.

Now in the planning stages for our next capital campaign, we already have a dynamic and informed agreement about where Colby-Sawyer is headed. As a small college with a small endowment, we do not have the margin or depth of resources to squander on secondary priorities or on risks we shouldn't take. Our ability to mobilize our efforts and to articulate what we are working on means we can make bold, strategic decisions quickly.

Perhaps more important, because the board and college leaders have provided a clear, understandable, readily accessible statement about our priorities, every faculty and staff member can choose what to do to be most effective in advancing the college. The board carries out its responsibilities in light of the plan. As president, I am evaluated in the context of what we have agreed together to achieve. Our future is bright because we all are navigating by the same star. ♦

Anne Ponder is president of Colby-Sawyer College in New London, N.H.

