Planning Our Future By Honoring Our Past

Peter Baratta – Chief Planning Officer, Stockton University
Gregory Janks – Cofounder, DumontJanks
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
Headcount change (annualized) over past five years:  +12%
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)

<table>
<thead>
<tr>
<th>Institution</th>
<th>White</th>
<th>Black</th>
<th>Hispanic</th>
<th>Asian</th>
<th>Other</th>
</tr>
</thead>
<tbody>
<tr>
<td>NJCU</td>
<td>20.8%</td>
<td>22.7%</td>
<td>40.1%</td>
<td>7.9%</td>
<td>8.5%</td>
</tr>
<tr>
<td>NJIT</td>
<td>32.0%</td>
<td>8.2%</td>
<td>19.7%</td>
<td>20.8%</td>
<td>19.4%</td>
</tr>
<tr>
<td>Kean</td>
<td>33.6%</td>
<td>19.4%</td>
<td>28.1%</td>
<td>5.4%</td>
<td>13.4%</td>
</tr>
<tr>
<td>Rutgers</td>
<td>37.1%</td>
<td>10.4%</td>
<td>15.8%</td>
<td>23.2%</td>
<td>13.5%</td>
</tr>
<tr>
<td>W. Paterson</td>
<td>38.7%</td>
<td>16.7%</td>
<td>31.3%</td>
<td>7.2%</td>
<td>6.0%</td>
</tr>
<tr>
<td>Montclair</td>
<td>41.2%</td>
<td>12.8%</td>
<td>27.6%</td>
<td>5.9%</td>
<td>12.5%</td>
</tr>
<tr>
<td>T. Edison</td>
<td>50.8%</td>
<td>14.0%</td>
<td>10.5%</td>
<td>3.9%</td>
<td>20.7%</td>
</tr>
<tr>
<td>Ramapo</td>
<td>63.8%</td>
<td>4.9%</td>
<td>15.3%</td>
<td>7.6%</td>
<td>8.4%</td>
</tr>
<tr>
<td>TCNJ</td>
<td>65.3%</td>
<td>5.9%</td>
<td>12.8%</td>
<td>11.5%</td>
<td>4.4%</td>
</tr>
<tr>
<td>Rowan</td>
<td>65.8%</td>
<td>10.1%</td>
<td>10.0%</td>
<td>4.5%</td>
<td>9.5%</td>
</tr>
<tr>
<td>Stockton</td>
<td>68.5%</td>
<td>8.0%</td>
<td>12.6%</td>
<td>6.0%</td>
<td>4.8%</td>
</tr>
<tr>
<td>NJ Total</td>
<td>44.4%</td>
<td>11.9%</td>
<td>19.0%</td>
<td>12.7%</td>
<td>12.2%</td>
</tr>
</tbody>
</table>

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

<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>White</td>
<td>57%</td>
<td>70%</td>
<td>44%</td>
<td>56%</td>
<td>44%</td>
<td>41%</td>
<td>58%</td>
<td>69%</td>
</tr>
<tr>
<td>Black</td>
<td>13%</td>
<td>12%</td>
<td>15%</td>
<td>16%</td>
<td>12%</td>
<td>15%</td>
<td>14%</td>
<td>13%</td>
</tr>
<tr>
<td>Hispanic</td>
<td>9%</td>
<td>4%</td>
<td>28%</td>
<td>20%</td>
<td>5%</td>
<td>3%</td>
<td>6%</td>
<td>8%</td>
</tr>
<tr>
<td>Asian</td>
<td>2%</td>
<td>2%</td>
<td>10%</td>
<td>2%</td>
<td>3%</td>
<td>12%</td>
<td>4%</td>
<td>6%</td>
</tr>
<tr>
<td>Other</td>
<td>2%</td>
<td>2%</td>
<td>2%</td>
<td>2%</td>
<td>5%</td>
<td>13%</td>
<td>4%</td>
<td>6%</td>
</tr>
</tbody>
</table>

**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 sunsetting 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

The graph shows the historic undergraduate fall enrollments by program from 1997 to 2017. The y-axis represents the number of enrollments, ranging from 0 to 1400, while the x-axis represents the years from 1997 to 2017. The data is represented by multiple lines, each indicating a different program. The trend lines vary in complexity, with some showing steady growth, while others have fluctuations or plateau periods. The red line at the bottom of the graph indicates a baseline or specific enrollment target.
Course Enrollment Fall 2017

School of Social & Behavioral Sci.
School of Business
School of Health Sciences
School of Natural Sciences & Math
School of Arts & Humanities
No College Designated
School of General Studies
School of Education

first year
second year
juniors
seniors

Legend:
- School of Social & Behavioral Sci.
- School of Business
- School of Health Sciences
- School of Natural Sciences & Math
- School of Arts & Humanities
- No College Designated
- School of General Studies
- School of Education
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
- students
- staff
- faculty
- support
- work
- campus
- leadership
- commitment

OPPORTUNITIES
- programs
- resources
- growth
- diversity
- study
- issues
- enrollment
- outside

WEAKNESSES
- students
- programs
- staff
- student
- support
- education
- academic
- academic
- academic

THREATS
- competition
- community
- cost
- migration
- decline
- university
- population
- Atlantic
- Rutgers
FINANCIAL MODEL

Five Year Model
Stockton University

<table>
<thead>
<tr>
<th></th>
<th>Original FY18</th>
<th>Revised FY18</th>
<th>Feb Rev FY18</th>
<th>FY19</th>
<th>FY20</th>
<th>FY21</th>
<th>FY22</th>
</tr>
</thead>
<tbody>
<tr>
<td>Undergraduate Tuition Increase</td>
<td>2.5%</td>
<td>2.5%</td>
<td>2.5%</td>
<td>2.5%</td>
<td>2.0%</td>
<td>2.0%</td>
<td>2.0%</td>
</tr>
<tr>
<td>Graduate Tuition Increase</td>
<td>2.5%</td>
<td>2.5%</td>
<td>2.5%</td>
<td>2.5%</td>
<td>2.0%</td>
<td>2.0%</td>
<td>2.0%</td>
</tr>
<tr>
<td>Doctoral Tuition Increase</td>
<td>2.5%</td>
<td>2.5%</td>
<td>2.5%</td>
<td>2.5%</td>
<td>2.0%</td>
<td>2.0%</td>
<td>2.0%</td>
</tr>
<tr>
<td>Fee Increase</td>
<td>2.5%</td>
<td>2.5%</td>
<td>2.5%</td>
<td>2.5%</td>
<td>2.0%</td>
<td>2.0%</td>
<td>2.0%</td>
</tr>
<tr>
<td>Enrollment Increase</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Undergraduate</td>
<td>3.0%</td>
<td>3.0%</td>
<td>3.0%</td>
<td>4.5%</td>
<td>3.6%</td>
<td>3.0%</td>
<td>3.0%</td>
</tr>
<tr>
<td>Graduate</td>
<td>3.0%</td>
<td>3.0%</td>
<td>2.0%</td>
<td>2.0%</td>
<td>2.0%</td>
<td>2.0%</td>
<td>2.0%</td>
</tr>
<tr>
<td>Doctoral</td>
<td>2.0%</td>
<td>0.0%</td>
<td>0.0%</td>
<td>0.0%</td>
<td>0.0%</td>
<td>0.0%</td>
<td>0.0%</td>
</tr>
<tr>
<td>Housing Occupancy</td>
<td>98.0%</td>
<td>98.0%</td>
<td>96.0%</td>
<td>96.0%</td>
<td>96.0%</td>
<td>96.0%</td>
<td>96.0%</td>
</tr>
</tbody>
</table>

Fund balance on (100%) off (0) 100.0%
Program Review Requests on (100%) off (0) 0.0%
Program Review Capital Requests on (100%) off (0) 0.0%
Housing Occupancy increase/decrease 1%
Total (University and Aux and Agency) 1%
Undergraduate Tuition Increase Estimate 1%
Fee University Impact 0.0%
Graduate/Doctoral 0.0%

1% Enrollment UG Increase
1% Enrollment Graduate Increase
1% Enrollment Doctoral Increase
### Themes

<table>
<thead>
<tr>
<th><strong>ACADEMIC</strong></th>
<th><strong>CULTURE</strong></th>
<th><strong>RESOURCES</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td>faculty</td>
<td>history</td>
<td>financial</td>
</tr>
<tr>
<td>interdisciplinary</td>
<td>community</td>
<td>space</td>
</tr>
<tr>
<td>programs</td>
<td>diversity</td>
<td>staff</td>
</tr>
<tr>
<td></td>
<td>structure</td>
<td>services</td>
</tr>
<tr>
<td></td>
<td>geography</td>
<td></td>
</tr>
</tbody>
</table>
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.
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
<table>
<thead>
<tr>
<th>INITIATIVE: FINANCIAL SUSTAINABILITY</th>
<th>YEAR 1 (AY 19-20)</th>
<th>YEAR 2 (AY 20-21)</th>
<th>YEAR 3 (AY 21-22)</th>
<th>YEAR 4 (AY 22-23)</th>
<th>YEAR 5 (AY 23-24)</th>
</tr>
</thead>
<tbody>
<tr>
<td>STATE FUNDING</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>➢ Activity</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>➢ Responsible persons</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>➢ Metric/means of evaluation</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>ZERO-BASED BUDGETING</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>➢ Activity</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>➢ Responsible persons</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>➢ Metric/means of evaluation</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>MASTER PLAN &amp; SPACE USE</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>➢ Activity</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>➢ Responsible persons</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>➢ Metric/means of evaluation</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>CAPITAL INVESTMENT STRATEGY</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>➢ Activity</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>➢ Responsible persons</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>➢ Metric/means of evaluation</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Establish a plan to INCREASE LIQUIDITY</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>➢ Activity</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>➢ Responsible persons</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>➢ Metric/means of evaluation</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
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

• 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