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TAKEAWAYS



# Why Strategy Efforts Fail in Higher Education — and How to Make Them Succeed

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# Why Strategy Efforts Fail in Higher Education — and How to Make Them Succeed

Key Takeaways From a Virtual Forum  
Presented by *The Chronicle* and Watermark



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## SPEAKERS

### JuliAnn Mazachek

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### Meredith Woo

Professor of Practice,  
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**M**any institutions lose time and money because of strategic initiatives that fail to deliver on promises such as enrollment growth and key operational improvements. To help institutions learn how to avoid these pitfalls by drawing upon new research and case studies, *The Chronicle* held a virtual forum, “Why Strategy Efforts Fail in Higher Education — and How to Make Them Succeed” on March 7. The following comments, which have been edited for clarity and length, represent key takeaways from the forum. To hear the full discussion, watch the recorded webinar [here](#).

**Paul N. Friga:** Here are five things I see go wrong with creating and implementing strategies: *Too many cooks in the kitchen*. I've seen strategic planning efforts with 35 people involved and multiple committees. That just becomes so unwieldy. You can't even get meetings scheduled. You should have about seven or eight people on a task force and create an advisory group with 40 or 50 people and check in with them two or three times over the course of the project. Then, of course, involve the board of directors or regents before and after — maybe even during the process. *Everything but the kitchen sink*. Don't try to come up with all the operational plans. Let your people do their planning. You should set big strategic priorities and give them some objectives, but let them fill in the plans. *Donkey's years*. In the old days, you'd take a year — or longer — to do a strategy and then get to executing. That's too long. It should be three or four months or maybe a little bit longer. Otherwise, people get strategy fatigue. *The rubber doesn't hit the road*. This is when you don't back it up with resources. You've got to put in money, or it's not really a priority. *You can't manage what you don't measure*. You've got to have a few metrics. You've got to track your strategy quarterly and annually.

**Liz McMillen:** Meredith and JuliAnn, what did you make of Paul's description of what some institutions do wrong?

**JuliAnn Mazachek:** One of my first conversations with Paul had to do with what he described as donkey's years. I've been doing strategic plans since the beginning of my career, and I've never seen a plan that was better because it took 18 months as opposed to 12 months — or 10 months.

**Meredith Woo:** If strategic efforts so often fail, why do we do them? The reasons for creating a plan have a lot to do with how the plan comes out. If your board wants a plan, you may end up with a guide to what the president is doing and help the board evaluate the president and chief officers, in which case there might be a tendency for the administration to underpromise and overdeliver.

If your president wants a strategy, it might be because he or she doesn't yet have one in mind, in which case your president is in deep trouble. It might be that your president has a strategy and wants to legitimize it or make it better or gain more understanding of faculty, staff, and institutional culture. This requires knowing how to use your faculty and staff members and everyone else involved in the planning to get you what you need to supplement your strategy.

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If there's an emergency, you don't need a strategic plan. You need emergency measures. If your college wants long-term direction, you might remember what John Maynard Keynes said: "In the long run, we're all dead." For the short-and-medium term, though, Paul's advice is very useful.

**Mazachek:** Anyone who wants to be accredited has to do a strategic plan, so you might as well do it right. Plans with 95 ideas to execute don't mean anything. They don't help you set priorities. They don't help you allocate resources. They don't help you decide what moves the needle most. The identifying of key initiatives has to come from your senior leadership along with your board.

**McMillen:** Faculty members are often vehemently opposed to any strategy that even hints at reducing academic programs. What's the way forward?

**Friga:** To have a sense of urgency, you have to be transparent with your faculty members about your current situation and projections for your finances. Many of them are in the dark about issues like overall operating margin or unit level. They need clarity that there are gaps to fill. If you get faculty on board, you can work with them to identify which areas have the fewest enrollments and could be eliminated to reallocate faculty resources to growing areas.

**Mazachek:** Reallocation is imperative, because there isn't a panacea of growth coming in the future. Some of us might be growing. Others might not be.

We're a public, independent institution with about 7,000 students. We're a campus with open access — all you have to do is graduate from high school in Kansas and you have a place in our programs. We're also relatively stable financially, with strong donor support through the years, though we've been going through a 10-year trend of declining enrollments. I wanted to do strategic planning, because my background is in operations research and accounting management, and I've always believed in bringing people together to understand how we need to make decisions. I've seen that, when people have the same data I have, we often arrive in the same place.

We believe we're situated very well — that we have more opportunities than we've ever had in the past to change in the future. We're thinking about how to choose between those, begin to break down traditional silos in higher ed, and better use resources.

I was looking for a way for us to know whether we're doing the right things at the right time. I wanted people to be able to use our framework to make

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decisions that were consistent across the organization, learning not just the things we need to say yes to, but also the things we need to say no to. We wanted to come to quick agreement on who we are and who we think we're going to be in the future.

Transparency was key to the success we had in being able to move quickly through our strategic-planning process and find more than 90-percent agreement on the plan we were able to deliver to our board. We started off with our board but then we worked through our traditional governance processes. We had a few communitywide forums, and people gave us feedback early. We were headed in the right direction from the beginning. People felt like they had a voice, and that we were listening. They couldn't get everything they wanted, but the plan got better and better, reflecting what people were telling us. We essentially did it in four and a half months.

**Woo:** Sweet Briar College declared that it was closing in 2015 — a distinguished college that had educated women for 120 years. The president said, in so many words, that there were three problems they couldn't overcome: Sweet Briar was a liberal-arts college at a time when prospects for the liberal arts looked bleak. It was a women's college at a time when women didn't want to go to women's colleges. It was in rural Virginia at a time when students wanted to be in urban areas.

I remember thinking about this before I took on the job of resuscitating the college. If, from some perspectives, the liberal arts looked like the wrong idea, and it looked like the wrong time for a women's college and the wrong place for a college, then the next president had to make the liberal arts the right idea, make this the right time for a women's college, and make it the right place for a college. This framing helped me, over the next six years, think through how to create an emergency plan to resuscitate the college and create stability on the basis of comparative advantage and differentiators.

We created a very tight, sequential plan — academic restructuring, revenue increasing, and budget stabilization. The most effective, useful, critical part, which had the biggest payoff, was probably the communication plan. We went to the national press from the get-go. That put Sweet Briar on the map. A year after our emergency planning and implementation, Sweet Briar became one of the top liberal-arts colleges in terms of innovation, according to *U.S. News and World Report*.

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When we did what you might call strategic planning, we did it based on our understanding of our existential threats and our lifeline. We focused on making Sweet Briar the greatest place to learn about women's leadership. We had 3,000 acres of land on our campus, and we had to make it really attractive and interesting. We put in 20 acres of vineyard and 27,000 square feet of greenhouse. We went big on sustainability so women could be happy and engaged and also see a future career path as the smart farmers of tomorrow. We also focused on how you take the liberal arts and combine them with engineering. We thought, if other colleges are cutting their equestrian programs, then sooner or later we'll be unique for having a program to teach women leadership and how to comport themselves and learn empathy by being with such large animals.

Because our plan was fundamental, flexible, and broad, we were in a position to continuously tinker with it. I'm very happy to see the new president is pursuing the same strategic plan and the college is growing nicely, including its enrollment.