

The Five Phases of Strategic Planning

The process Stevens Strategy will follow will be designed around Peirce College's culture and needs. The strategic planning process may include our independent preparation of the college's strategic planning fact book and other strategic support services such as financial modeling and survey research (see next page). If the timing is right, we may facilitate a combined reaccreditation self-study and strategic planning process. We will determine early in phase one how we will utilize appropriately the presidential vision that has already been prepared. The following are the five phases of the general Stevens Strategy process:

- **Phase 1, Process Design** – We will conduct extensive interviews with faculty, staff, students, alumni, trustees and others through which we will gain an understanding of Peirce College's culture and the strategic issues it faces and have the opportunity to train the community in the process of strategic planning. We will also guide the institution in the preparation of a strategic planning fact book. In short, we will assess the institution's readiness for planning and develop a recommended process for planning that accounts for institutional strengths and weaknesses. At the end of this phase, we will also facilitate a conference with a variety of institutional stakeholders, including members from the Board of Trustees, administrators, staff, faculty, students, alumni, business leaders, feeder schools, employers, other institutional friends and members of the local community. The purpose of the stakeholder conference is to categorize strategic issues into the big strategic questions the institution will need to answer and to create an enthusiastic environment for the remaining phases of strategic planning.
- **Phase 2, Preparation of Responses to Strategic Issues** – The campus community will then become involved in a broadly participative process that explores responses to the strategic questions raised in the Process Design phase. This phase includes extensive work on the part of a strategic planning Steering Committee and Task Forces (work groups), which we will facilitate. The Steering Committee and Task Forces usually hold numerous open campus meetings and meetings with the Board of Trustees on the strategic planning process.
- **Phase 3, Strategic Agenda Preparation** – We will prepare the first draft of the Peirce College vision and strategy, which the President will complete with our support and which will receive the endorsement of the Steering Committee and campus community and the approval of the Board of Trustees. This document will become the central reference point for the initiatives that the institution will pursue over the next five years.
- **Phase 4, Operational Planning** – We will design an operational planning process and we will facilitate the preparation of that operational plan. This document is usually prepared by one or more work groups and includes the specific programs, budgets, time-lines and responsible parties necessary to implement each strategic initiative and a measurement system to assess whether the strategic plan initiatives will have been successfully implemented.
- **Phase 5, Implementation** – We will design in phase four an implementation process that the President and Steering Committee will lead in phase five. That process will include regular review of the strategic environment, a system for measuring success with the implementation of the strategic agenda, a system for updating the strategic and operational plans and a system for regular reporting to the Board and the campus community. Stevens Strategy will attend up to five Steering Committee meetings during the implementation period. We are also available to provide additional consulting support for the implementation in Phase 5 should you desire that additional support.

Consultant Biographies

Keiko Broomhead has nearly 15 years of higher education experience focusing on enrollment management, student services, and student affairs. Currently she serves as Vice President of Enrollment Management and Student Affairs at Wentworth Institute of Technology. At Wentworth she led the integration of Enrollment Management and Student Affairs divisions and oversees a staff of 88. She has spearheaded the college's enrollment management efforts for over a decade with a solid record of success in meeting and exceeding institutional goals. Ms. Broomhead has played a leading role in the college's strategic planning effort, serving as co-chair of the Planning Committee. She is a Contributing Writer for *Color*, a multicultural magazine for professionals of color. She has experience in international education and taught for two years in Japan. Her written work has appeared in the publication *Study in the USA*. She is certified as a College Planning Specialist. She holds a B.A. from Oberlin College and an Ed.M. from Harvard University. She is currently pursuing an Ed.D. from Northeastern University.

Stephen Lazarus comes to Stevens Strategy from HEEA. He has experience in higher education issues with a focus on higher education policy, compliance and governance. Through his affiliation with HEEA, Stephen's higher education clients include Bethany College, D'Youville College, Fontbonne University, Friends University, Emerson College, Gannon University, Huston-Tillotson University, Lourdes College, Medaille College, Nebraska Methodist College, Saint Leo University, Spalding University, Saint Joseph College, Saint Xavier University, Thiel College, and the University of San Diego. Prior to joining HEEA, Stephen spent 7 years practicing law with a focus on insurance defense litigation and employment law. He holds a B.A. degree from Loyola University, New Orleans and a J.D. from the Catholic University of America.

Brendan Leonard has nearly 20 years of management experience in the higher education and health care industries. He has spent the last 10 years consulting primarily in the higher education industry, focusing on strategic planning, process redesign, systems implementation, and human resources systems assessment and design. His higher education clients include Barry University, Berklee College of Music, Colorado Mountain College, Drexel University, Eastern Michigan University, George Washington University, Holy Family University, Howard University, Immaculata University, Ithaca College, LaGuardia Community College, Marian Court College, New England College, Penn State College of Medicine, Rollins College, University of Montana, Vaughn College of Aeronautics and Technology, Vermont State College System, and Wheelock College. In addition, Brendan spent 7 years working in health care financial planning, financial reporting and analysis, and systems implementation. Prior to joining Stevens Strategy, in 2003, Brendan served as Senior Associate at Kaludis Consulting and Senior Consultant for HCm, Inc. He holds a B.A. degree from Haverford College and an M.B.A. from the Haas School of Business, University of California, Berkeley.

John A. Stevens has more than thirty years of higher education experience in strategic planning, institutional organization and governance, process redesign, financial planning, information system selection and implementation, collective bargaining and executive search. He has provided consulting service to more than seventy independent and public institutions from our nation's largest universities to its smallest colleges and schools, specializing in small to mid-sized institutions and the process of strategic change within them. In 2003, after 16 years at another higher education consulting firm, Dr. Stevens began Stevens Strategy, an independent consulting practice specializing in the development of strategy for colleges, universities and schools. At his previous firm, he served as its Senior Vice

President and Chief Operating Officer and the head of its Strategy Consulting Practice. He has served as Assistant to the Chancellor of the Massachusetts Board of Higher Education, Vice President for Administration of Rhode Island School of Design, Assistant to the President of Boston University and President and Chairman of the Board of Little Red Schoolhouse, Inc. He has also served as a member of the New School Jazz Program Board of Governors, Vice Chairman of the Board of the Urban League of Eastern Massachusetts and Chairman of the Board of Trustees of New England College, a small residential, liberal arts college in Henniker, New Hampshire. He served there as interim president on a pro bono basis, as well. He is currently a member of the University of Massachusetts Political Science Advisory Board and the International Board of Advisors to the Shala Valley Project, an effort to trace the origins and evolution of settlement in Northern Albania from the earliest times to the present. He also serves periodically as a mentor at Harvard University Graduate School of Education. He holds the B.A. degree from the University of Massachusetts at Amherst and the Ed.M. and Ed.D. degrees from Harvard University.

Michael Townsley has more than 20 years of experience in academic services, financial systems, budgets, marketing strategy, payment plans, IT administration, ancillary operations, and site management. Mike is Senior Consultant with Stevens Strategy and former President of Pennsylvania Institute of Technology. During his 20 years as Senior Vice President for Finance and Administration at Wilmington College, he played a key role in making it one of the fastest growing private colleges in the country. He is the author of The Small College Guide to Financial Health: Beating the Odds and CD's entitled The Financial Toolbox for Colleges and Universities and The Strategic Turnaround Toolbox, all published by NACUBO between 2002 and 2005. Dr. Townsley holds a Ph.D. from the University of Pennsylvania. His dissertation analyzed the impact of market share on pricing policies. He also holds degrees from University of Delaware and Purdue University. His additional training includes work with Lily Endowment and Columbia University. Dr. Townsley has published widely and conducted studies on the financial structure of colleges, universities and for-profit institutions.