UW Whitewater Strategic Planning Proposal

Submitted by AASCU Penson Center for Professional Development

Howard Cohen, Senior Associate

Response to RFP UN-F090

Firm’s Experience at Conducting Strategic Planning

The AASCU-Penson Center for Professional Development (APC), established in 2014 and affiliated with AASCU, is a direct outgrowth of Penson Associates. Through the combined history of Penson and APC, consultants have worked with over 250 public universities over the past 40 years. Almost all of its work is with regional comprehensive, AASCU institutions.

The primary purpose of the APC is to work with colleges and universities – boards, presidents and academic and administrative leadership, faculty and others – to enhance the academic environment, student success, institutional effectiveness, competitive advantage and service to the region and State.

Strategic planning is an area of specialization for the APC, and the firm has successful protocols, best practices models and templates to assist in the strategic planning process.  Over the past three years our Associates have successfully facilitated numerous strategic planning processes, including Salem State College, Cal State San Bernardino; Henderson State University; University of Wisconsin-Superior; Roosevelt University; Cal State Dominguez Hills; Northern Oklahoma College; Dixie State University; Southwestern Oklahoma State University; and The Chicago School of Professional Psychology.

There are twenty Associates in the APC – all successful administrators and former presidents whose wide range of experience collectively touches on all aspects of academia.  Each has particular areas of specialization and routinely draw upon one another’s expertise in order to serve the needs of an institution.  In a very real sense, when an institution engages an APC Associate as its consultant, it gains the knowledge of all Associates.

Finally, because of their on-campus experience, all of the Associates in the APC have first-hand knowledge of the dynamics of colleges and universities and are proficiency at working with the many stakeholders involved in a successful planning process.

Proposed Consultant

Howard Cohen is Chancellor Emeritus and Professor of Philosophy at Purdue University Calumet. He was chancellor for 10 years and currently teaches philosophy part-time. Dr. Cohen has over 30 years of experience as an academic administrator serving as Department Chair, Program Director, Associate Dean, Associate Provost, Dean, and Provost as well as Chancellor. He has also served for a year as Interim President at SUNY Buffalo State. Dr. Cohen’s experience has been in regional campuses of public university systems, including Wisconsin at UW Parkside and UW Green Bay. He has particular expertise in academic planning, strategic planning and leadership development.

Outline of the Engagement

1. Getting started

Establish a strategic planning committee

Gather relevant documents

*The consultant works with President by phone to assure that the committee is representative, diverse and meets the expectations of shared governance.*

*The consultant works with the President by phone and email to gather documents that set the context for strategic planning at UW-Whitewater.*

*Consultant visit 1: Consultant on campus for first meeting of the Strategic Planning Committee. The consultant will work with the committee chair(s) to develop an agenda and will facilitate the meeting.*

1. Campus involvement

Hold a Town Hall meeting to involve the campus in the process

*The consultant works with the Strategic Planning Committee chair(s) by phone and email to plan Town Hall meeting agenda.*

*Consultant visit 2: The consultant facilitates the Town Hall meeting and works with the committee to gather and organize campus feedback on strategic issues at UW-Whitewater.*

1. Addressing first questions

Develop initial positioning ideas, communicating them and testing them with constituencies

* What are our areas of greatest strength and promise?
* What currently makes this university truly distinctive in relation to peers and competitors?
* What are the major forces, trends or issues – in higher education, in our state, our system, and our region - that will affect the future of this university?
* What are our greatest opportunities to enhance quality; to carve out a place for ourselves that will lead to distinction and serve our constituents?

*Consultant visit 3: The consultant facilitates the Strategic Planning Committee discussion of these questions and helps develop a work plan to assure that the answers inform the strategic planning process.*

1. Framing and aligning the strategy

Review mission, vision and values statements and revise if necessary

Draft an initial set of 4-6 major goals

*Consultant visit 4: The consultant facilitates the Strategic Planning Committee discussion of the current mission, vision, and values statements and helps the committee craft revisions, if required.*

*The consultant reviews and edits committee drafts by phone and email.*

1. Planning the path

Formulate key activities for each major goal

*Consultant visit 5: The consultant facilitates the Strategic Planning Committee meeting to select key activities for each of the selected major goals.*

*The consultant works with the committee chair(s) by phone and email to develop goals and activities statements.*

1. Setting a course of action

Review goals to assure that they are attainable and measurable

Determine responsibilities and timelines for accomplishing goals

*The consultant reviews and edits written documents from the committee by phone and email that become the content of the strategic plan and that lay out the steps for implementation.*

1. Beginning the journey

Document and communicate the strategic plan

*The consultant reviews and edits final plan document,*

*Consultant visit 6: The consultant joins the committee for a final review of the document and works with the committee to develop a communication plan to present the plan to multiple constituencies.*

Fee Structure and Expenses

Six days on campus, including travel time, at $2,500 per day.

$15,000

Five days off-site for phone and email consultation, review and editing of documents and addressing issues raised by the committee chair(s) at $1000 per day.

$5,000

No additional fee for consultation beyond the estimated hours of off-site consultation.

Travel expenses

* Travel by car at 268 miles/round trip. Wisconsin reimbursement rate
* Meals during travel and visit that are not provided. Wisconsin reimbursement rate
* Overnight accommodations only if requested by the President for consultation on evenings prior to visits.

An additional consultant from the APC, Associate John Haeger, will participate in some of the campus visits at no additional expense to UW-Whitewater. Dr. Haeger is the former president of Northern Arizona University and an experienced academic administrator.

Recent Clients

Dr. Faith Hensrud, Provost, UW Superior, Old Main 210, PO Box 2000

Superior, WI  54880 Phone: 715-394-8449

Facilitated Provost’s Committee on Streamlining and Innovation to develop strategies to address structural deficits

Anne Mandeville, Director, Corporate Partnerships, AASCU, 1307 New York Ave. NW, Washington DC 20005 Phone: 202-478-4643

Developed survey and conducted focus groups of AASCU presidents and provosts on incentives to increase numbers of graduates and graduation rates. Drafted final report.

Dr. Sue Gerber, Executive Director, Institutional Effectiveness, New Jersey City University, 2039 Kennedy Boulevard, Jersey City, NJ 07305 Phone: 716-341-8848

Developed agenda and facilitated retention planning portion of campus student success summit

Dr. Bassam Deeb, President, Trocaire College, 360 Choate Ave. Buffalo, NY 14220 Phone: 716-827-2422

Facilitated goal setting process for senior leadership

Dr. Barbara O’Block, Superintendent of Schools, Diocese of Gary, 9292 Broadway Ave. Merrillville, IN 46410 Phone: 219-769-9292

Facilitated Board Development retreat