

Strategic Thinking Document

October 9, 2019

David A. Armstrong, J.D.

President

St. Thomas University

The following is a Strategic Thinking Document, not a Strategic Planning Document. Any quality strategic plan comes from the congruence of thought, data, discussion, participation and collaboration of an entire organization to set a course for the future. A strategic thinking document is just that, one person's view of the landscape facing higher education and thoughts on potential goals, strategies and tactics that can be used to deal with advancing an organization in the future.

These thoughts have been greatly influenced by three articles and a book written about the future of higher education. The articles describe the major challenges and disruptions ahead for education. And they offer tactics to successfully navigate the future of higher education in these extremely volatile times.

From my first day, I referenced higher education writer J. Selingo's April 2013 article that spoke of the coming "disruption" of higher education and that only 400 to 500 of the 4000 college and universities in the country have the fiscal strength to weather the oncoming storm. Selingo added that the schools most vulnerable in the changing landscape of higher education are small, tuition driven, faith-based, underfunded, under-endowed colleges. His predictions are clearly coming to the fore on a daily reading of higher ed news.

Second, an article written by Kent Barnds entitled "**Private Colleges Need a New Agenda**" featured in InsideHigherEd challenged the old formula for private colleges that ambition + tradition = progress. He argues that a new formula is needed for small private colleges to advance in a time of volatility. He writes that the new formula for success is achieved by mastering five steps that are outside the norm of past behavior for smaller private institutions. First, *Operate Like a Start-Up*; private colleges need to innovate more, be creative and act quickly which is a distinct advantage over large flagship universities. Second, *Fully Embrace the Teacher-Mentor Model* that is so beloved by alumni and current students. Faculty who teach, advise and lead

their students to quality experiential opportunities will create a differentiator for smaller privates. Which leads to the third concept, *Be Bold When Identifying What Students Can't Do at Flagships*. The flagships cannot replicate the teacher-mentor model and smaller class sizes nor can they offer the student organizations, clubs and athletic opportunities present at smaller schools. Shout those statistics and differences from the mountain top. Fourth, *Emphasize Place-Based Teaching and Scholarship*; leverage your location by embracing academic programs that serve and/or derive from your region. Developing academic programs tied to climate change, sustainability, trade and logistics, hospitality and tourism and grow our Sports Administration program to meet the needs as South Florida becomes the sports mecca of the country. And lastly, yet most important, *Double Down On Your Hometown*; help your community as a good citizen, ally and partner with the region while embracing your place in it. STU is located in one of the most desired places to be globally, use this.

The third article written by Scott Kelley from DePaul University is an existential conversation with his brother, a marketing executive with NIKE, on the question “**Do Catholic Universities Still Have a Value Proposition?**” The question is a simple one, is there a place for Catholic Universities in a growing secular society that abhors tradition and rules. Can Catholic Universities have a brand that resonates with today's students? Kelley's brother describes what a brand is. “A brand is based on authenticity and integrity,” he said, “a relationship between what I stand for and what you want ... That's the job of a brand: to connect those things.” After a discussion on the challenges facing all private institutions in the current higher education landscape, Kelley opines that Catholic Universities are in the business of “integral human development, a concept from Catholic social teaching that pursues the development of the whole person -- from a spiritual, social, cultural and economic perspective -- as well as the development of all people.” Catholic education has taught societies for hundreds of years with a salvific and a catholicity foundation. Catholic teaching is based on things of enduring value (salvific) and towards wholeness (catholicity). Therefore, Kelley surmises that a Catholic University's Value Proposition is the following.

“This leads us to the most important value proposition of Catholic universities: to educate students to shape the future we want. Catholic universities belong in today's higher educational matrix because they imagine the development of the whole person and of all people. They do much more than educate for jobs or careers. It should follow that those students who feel it is their duty to save our world will become the most loyal customers of all.” There is a place for values- based institutions who educate the whole person for the whole

of the world, Universities that educate “ethical leaders for the global community” can not only survive but thrive!

Lastly, a book by the President of Northeastern University, Dr. Joseph Aoun, “**Robot Proof**” provides the blueprint for higher education institutions that wish to prepare their students to thrive in an artificial intelligence global economy. Dr. Aoun strongly asserts that if colleges and universities want to serve their constituencies and society, then institutions need to move from centuries of stale pedagogy to teaching what he calls the “Humanics” to equip students to compete with artificial intelligence. Humanics is based on three literacies that higher education should embrace to prepare students for the future, Technological, Big Data and Human. Technological Literacy means universities need to ensure students are educated and conversant in the use of modern technology. Big Data Literacy is the understanding of big data, gathering and disseminating of quality information and the ability to communicate data to the decision makers in an organization. And finally, Human Literacy is the liberal arts. Teaching academic areas that stimulate and hone critical and analytical thinking skills, effective communication through writing and reading, the understanding of complex ideas while appreciating the arts, theology and philosophy. Dr. Aoun theorizes the best way to teach Humanics is through experiential learning. Learning and understanding the theoretical, having the acumen and education in an area while living the practical out in the real world so students are prepared to contribute in their chosen organization day one.

Armed with the knowledge provided by these educational writers and our experiences here at STU and beyond, we can venture into our future decision making process. As we embark on a new Strategic Plan, we must recognize that it is a change process by which we can determine our approach to all the challenges we face in higher education and the world. In this process we must ask ourselves:

1. What is our identity, our academic purpose?
2. Who are constituents, who do we serve?
3. What are the programs and services we need to serve our constituents?
4. How do we know we are successful, how do we determine institutional effectiveness?

If we recognize that the Strategic Planning process is a change process, then these questions must be answered in order for us to determine our future direction. The first two questions can be answered by

examining our mission, values and student data. The third question is answered by our *five pronged test of evaluating programs*:

- i. *Is it mission-centric?*
- ii. *Is there a market for the program?*
- iii. *Can our constituents be educated in this program?*
- iv. *Are there positive outcomes for our constituents in this program?*
- v. *Is this program fundable by tuition revenue, foundations, government grants, or by private donors?*

The fourth question of the Strategic Plan will be answered by academic assessment measurements and fiscal metrics.

As we venture into this exercise let us not forget the quote from Dean Karnez"The Bold Don't Live Forever, But the Timid Don't Live at All". How can STU look at the challenges facing us and turn them into opportunities? .How can we take Jim Collins theme of "Big Hairy Audacious Goals" and use them to transform how we perform our core mission? It is important, as we think strategically, to toss out some big, bold ideas and tactics that can differentiate STU in the market of higher education.

Therefore, if the Three Pillars (presented at the Inauguration as guideposts) were formulated into goals what could they look like?

First Pillar: STU as a Catholic Archdiocesan University is about educating students for Faith Formation and becoming Ethical Leaders for Life in our Global Community.

Our Mission Statement is direct and clear. ***STU is a Catholic University with rich cultural and international diversity committed to the academic and professional success of its students who become ethical leaders in the global community.*** The theme of our inauguration was Global, Ethical, Leadership. We need to act with salvific intent as we ensure the catholicity of the education we provide as an Archdiocesan university.....enduring values for the whole person for the whole of the world.

Questions & Potential Tactics.

- a) *What does it mean to be an Archdiocesan Catholic College?* There are only 10 in the country so how does being Diocesan enhance a distinctive education? Does it mean more theology courses or more intensely Catholic theology courses? Are we Catholic with a big C, where we want to only serve Catholic students teaching Catholic dogma only or catholic with a small c where we are more universal and open to educating students of all faiths and beliefs? In an ever growing secular society, where students and families are less inclined to identify as religious, how do we demonstrate the value of a faith-based education? STU is an 81% minority institution with many of those students not Catholic but desiring a Catholic education, how do we continue to stress the importance of the Catholic intellectual Tradition to non-Catholic students?

Tactic I: Re-examine what it means to be an Archdiocesan University in a growing secular world and educate front line enrollment & advancement personnel to integrate our distinctiveness as an Archdiocesan University for our constituents.

Tactic II: Intensify our training in the Catholic intellectual tradition for faculty, staff and students through speakers, seminars and UNI/101.

Tactic III: Reinvigorate the STU Law Catholic Identity Committee and increase our participation with the South Florida St. Thomas More Society.

Bold Activity: Strive to become the Great Catholic University for the Great American and Global City of Miami!

Bold Activity: Position STU as the Catholic Global leader for Online, Dual Enrollment and Adult Life-Long Learning education.

- b) *How do we educate students to be ethical leaders for the global community?* We can't just say we educate ethical leaders without being intentional about it. We must create an Ethical Leadership Program at the Bachelor's, Master's and Doctoral Level that is grounded in the Catholic Intellectual Tradition, the

liberal arts, a strong business core and specific knowledge designed to bridge the workforce development gap. STU should be intentional in educating the future leaders for the future industries. In order to be intentional about living our Mission, we should develop an Institute for Ethical Leadership that fuels the program and enables STU to teach ethical leadership studies across the curriculum.

Tactic I: Create an Institute for Ethical Leadership where the Center for Ethics can reside and find a donor to endow the program. Develop ethical leadership as a distinctive differentiator at STU across the curriculum.

Bold Activity: Promote and position Ethical Leadership as a premier, distinctive program that extends nationally and, eventually.....global.

Second Pillar: Sustain and/or Create Quality Programs that Lead to Student Success.

Academic institutions that cannot quantify the quality of their academic, co-curricular and extracurricular programs and that cannot prove the student's investment leads to an economic and personal return, will not survive. STU must sustain and create programs that are superior to our competitors. Students and their families must receive a return on their investment. Anecdotal evidence that a program is "good" is no longer sufficient in today's educational and political environment. Programs that were "great" in the 80's and the 90's does not mean they are sustainable today. Students are attracted to quality programs that place them in financially secure careers which change the trajectory of the lives of themselves and their families. Tough calls will need to be made on programs that are not of quality and/or sustainable. Program evaluation based on metrics and data will assist in determining key programs that can be centers of excellence which drive sustainability and mission. STU Law has been a point of pride for the University since its inception. STU Law is a regional treasure for the University. We need to make decisions that will leverage our past success while positioning the Law School to become a national leader in legal education. STU must create a strong student experience academically and socially. We need to be student-centered as we make academic and student life decisions.

Tactic I: Program Prioritization needs to be implemented across academic, co-curricular and extracurricular programs.

Tactic II: STU must determine what are the programs that can be centers of excellence which drive sustainability.

Tactic III: Create a premier experiential learning program that drives ROI for our students and creates a mutual benefit for our regional employers.

Tactic IV: Nurture co-curricular and extra-curricular programs that are transformative in nature and national in scope.

Bold Activity: Build two to three academic programs that become centers for excellence on the national stage.

Bold Activity: Position STU Law as a premier law school in the U.S. while maintaining its diversity and mission.

Third Pillar: STUWARD our Resources. No Margin, No Mission. To increase our resources through enrollment, auxiliary enterprises, fundraising and a larger endowment to produce greater interest income so the College has the financial, human and physical resources necessary to pursue distinction in education.

Surviving versus Thriving. STU will never thrive if we continue to spend money we do not have. In addition, STU must wean itself off vendors who only take and find partners who will invest in our Mission and fiscal success. Our habits over the last several years of building budgets on unrealistic revenue projections, even when those revenue projections fall woefully short, is not a path to future success. In addition, what is our process of determining accountability by department and persons when projections are not met and expenses exceed revenue? In the future, we will build conservative budgets based on realistic revenue projections and, just as important; we will demand accurate, timely reports of revenues and expenditures so we can stop spending when necessary. In this process, some very hard decisions need to be made as to funding of non-producing programs. Are we willing to go through the necessary, transparent examination of all our programs to determine "where our bread is buttered" when it comes to producing revenue? It is imperative we evaluate all policies and procedures to create the maximum ability for the institution to improve its financial position. All employee handbooks need to be updated to keep with best practices and we have

to jettison policies that jeopardize the fiscal future of the University. Everyone must be accountable to the margin so the Mission thrives.

Questions & Potential Tactics.

a) *How will the University will increase its resources?*

Tactic 1: The University will grow its enrollment by fall 2023 to: Full-time UND students: 1500, Resident students: 800, Law School 700, 600 on- ground Graduate, 1000 Online Adult/Graduate student unique enrollments.

Potential Activities:

1. New revenue streams need to be created: grow full-time enrollments for undergrad and law school, on-line; increased transfers; graduate programs.

Bold Activity: develop 5-year Bachelor/Masters degree programs where students become more employable by walking out in only 5 years with a Bachelors and an advanced degree. 6 years for STU LAW.

2. New Academic programs: Health Sciences, Environmental Sustainability, Marine Biology, Banking, Trade/Logistics/Supply Management, Hospitality/Tourism, etc.

Bold Activity: Create a Professional Studies program within Business that educates and develops ethical leaders in professional studies. Become the regional leader in experiential learning and management development for the Service Industry. Funding available through the partnerships with the companies who will provide experiential learning and employment upon graduation.

3. New or re-energized co-curricular programs: marching band, choir, theater, learning differences, military.

Bold Activity: Add enough quality athletic programs so the SUN Conference Commissioner's Cup is a

consistent goal and STU is a recognized national contender in several sports.

4. New Athletic/Club programs: lacrosse, rowing, bowling, wrestling, rugby, swimming.
5. Build the best Enrollment division in the region for traditional & adult recruitment and retention .

Tactic 2: The University will develop partnerships and seek opportunities to increase auxiliary income.

- Seek opportunities whereby academic programs can provide real life/experiential learning opportunities while earning income for the University. Examples include scientific research for companies, business planning for companies, Professional Studies programs that run ongoing concerns.
- Leverage the business community of South Florida to partner with STU to create learning opportunities and revenue enhancers.

Tactic 3: The College will increase its fundraising capabilities.

- Build an institutional Philanthropy division that has the personnel and resources to increase fundraising through annual fund, grants, planned giving, major gifts and special projects.
- Do a thorough review of our alumni database so a comprehensive and quality wealth screening can be performed.

Bold Activity -Study feasibility of a Capital Campaign that would raise \$50M as we head into the 2020's.

Tactic 4: Put mechanisms in place to start building an endowment sufficient to ensure the survival of the University for the next hundred years.

- Industry standards are that an endowment should be 3X the size of its yearly budget which would equal \$150M for STU with a yearly budget of \$50M.
- In the next 10 years, our endowment goal should be to double the endowment from \$26M to \$52M.

b) How to best invest in the financial, human and physical resources necessary to pursue distinction in educational attainment?

Tactic 1: Invest in a database management system and training for a more user-friendly, cost effective and accurate reporting of academic, enrollment and financial data.

- Break down silos in Registrar, Financial Aid and Student Accounts so students have a seamless quality experience from start to finish at STU.
- Hire and/or create more super users on campus.
- Upgrade technology infrastructure and training.

Tactic 2: Create an academic and administrative culture of accountability and assessment that allows for better decision making for budgets and compensation.

- Increase development and training opportunities for faculty and staff
- Academic & Administrative entities should study departmental and individual impact of revenue production and/or expense reduction.
- Review and reconstruct all employee compensation and policies to best serve the Mission of the University and maintain fiscal viability for years to come.

Tactic 3: Invest in physical plant, reinvigorate old spaces, build new residence halls and/or renovate existing.

- Build a new performing arts building.
- Assess Faculty & classroom space for educational effectiveness to determine best investment to Improve space.
- Create a plan with a partner on the replacement of dated housing and construct new modern residence halls with a new dining facility and student union.

Bold Activity: develop partnerships to investigate creative ways to change out existing residential stock to build and/or rehab housing that will attract students while adding to the aesthetics of a college campus. Create a welcoming yet bold face to the architecture of the campus.

Bold Activity: Add synthetic turf and lights to all existing grass fields to attract more community investment and grow programs. STU can be the mecca for youth sports camps that will increase

community awareness, drive community economics and create lasting impressions on future constituents.

- Add on to Fernandez Center and build a Stadium project to create more space for growing programs.

Final Strategic Thought: Identity and Marketing

We have an identity crisis at STU. Sadly, when anyone mentions we are representing St. Thomas University, the immediate response is “oh, you work for St. Thomas Aquinas High School!” It happens locally, regionally and for me it happened four times this past summer when I was in Italy..... so globally. In addition, there are double digit St. Thomas’s nationally in higher ed. I know this can be a very emotional issue but if we strive to become a leader here and beyond, we need an identity that captures who we are and where we are from. Plus, we will honor our past as St. Thomas by memorializing who we were, just like we did with Biscayne College.

Not many good things come out of a failed merger. But, STU did come out of the merger with two finds that can propel the University to new heights. First, we have a renewed sense of urgency as to the importance of fiscal responsibility and accountability. Second, the name Miami Catholic University was proposed for the new entity of the potential merger. As previously stated in the articles above concerning the best way for private faith-based institutions to thrive in the future world of higher education, a university must embrace its hometown, and if it is Catholic, embrace its catholicity. Miami has global cache. There are only ten Diocesan Catholic universities. I contend the best way for STU to stake its claim, as being **THE** Catholic Archdiocesan University of Miami and South Florida is to become **Miami Catholic University**. It states who we are, what we are and where we are from. That is an identity that will resonate for an institution which desires to become a Global Ethical Leader!

In just over a year, I have come to love STU and South Florida (and not just because I’ve seen more sun this past year than I’ve seen my whole life). Both have wonderful people with a great passion for their faith, families and having fun. I do what I do because of the transformative experience I had at a college just like STU. I want to create that experience for as many students as I can at a Catholic university like STU. I always say the “proof is in the pudding!” For STU, the proof of its commitment to its Mission is in the most recent US NEWS ranking on Social Mobility. STU is #1 in the South. It is proof that STU can take those with less and

transform them into those who produce more for themselves, their families and society. For this reason and to the fact we are a Catholic Archdiocese University, we need to develop a workable, memorable, achievable yet Bold Strategic Plan that guides our University to become more for many decades to come!

Conclusion:

There are many concepts in this document that are meant to spur more conversation and thought as we all collaborate on the direction of our University. On a final lighter note; when it comes to this exercise please remember US President LBJ's thoughts on good strategic planning:

- 1 Do Something!
- 2 If it works, keep doing it!
- 3 If it doesn't work, do something else!

God Bless and Go Bobcats!