

# Florida A&M University Strategic Plan Brief

## Background

The five-year strategic plan is the roadmap to enhance student success, meet state performance metrics to fund higher education, and fulfill FAMU's institutional mission as an 1890 land-grant institution dedicated to the advancement of knowledge, resolution of complex issues and the empowerment of citizens and communities.

There are several challenges in higher education – increasing competition for the best and brightest students, college readiness among high school graduates, reductions in state appropriated funding, stiff competition for research funds, a growing desire for “free college” and student loan forgiveness, rising costs of IT and security, changing requirements in need-based financial aid and Parent Plus loan availability, and balancing historical missions with outcomes-based funding, to name a few. The strategic planning process will engage in a comprehensive process to explore historical trends, gather data and insights, and take an inside-out approach to developing the 2023-27 strategic plan.

Since the Performance Based Funding (PBF) model was instituted in 2012-13, Florida A&M university has made consistent strides across several metrics. In 2020, the University achieved the highest score on record and received \$14.8M from our own investment and \$13.3M from the state budget. The University is on track for another banner year in 2021. Still, there is more work to be done.

## Objective

To develop and recommend the FAMU Strategic Plan 2023-27 narrative, metrics, and key performance indicators, including:

- Mission and vision statement
- Ideal size and mix of FAMU students and academic programs
- Recruitment/enrollment strategy
- Budget modeling approach, including various financial funding/expense scenarios
- Research priorities
- PBF choice metric recommendation

## Success Metrics

- Approval by Board of Trustees
- Approval by Board of Governors
- Strategic plan must correlate to expected resources

## Guiding Principles

- Bold
- Inclusive
- Transparent
- Focused (fewer, bigger, better initiatives, metrics and KPIs)
- Balance between probable and stretch goals
- Mission and outcomes-focused

## Stakeholders/Roles

Following are the high-level roles for the strategic plan development:

- **Responsible:** President Larry Robinson
- **Accountable:** Board of Trustees facilitated by Liaison Trustee Kristin Harper

- **Consulted:** Florida Board of Governors, Chancellor, Florida Legislature, Southern Association for Colleges and Schools Commission on Colleges, Provost Maurice Edington, Multidisciplinary Strategic Planning Work Group, students, current and retired faculty staff and administrators, alumni, Tallahassee community, corporate partners, and K-12 educators & counselors
- **Executes:** President Larry Robinson, Provost Maurice Edington (Committee Chair), and Multidisciplinary Strategic Planning Work Group

## Scope

- Consider external factors such as national higher educational trends, Federal education current and potential priorities, workforce needs, demographic trends, COVID19 impact, different modes of instruction, faculty training
- Infrastructure (i.e., buildings, plant, equipment, digital roadmap, IT/cybersecurity)
- Facilities
- People – faculty, staff, students

## Existing Assets

- BOG 2025 Strategic Plan and Performance Indicators and dashboard
- FAMU 2017-22 Strategic Plan
- Institutional Work Plans
- Accountability report
- Dashboard
- Thurgood Marshall presentations
- 2017 Key Issues for Board Consideration

## Executorial Mandatories

- Develop multiple strategic plan scenarios, ranging from best case to worst case
- Strategic plan alignment with the Board of Governors priorities, Performance Based Funding metrics and Florida State University System
- Consider priorities and current/potential legislation of the Florida Legislature (i.e., S.B. 86 limiting financial aid to majors with high market demand, BOGO bill—free semester for every semester in priority majors)
- Establish website to provide Strategic Planning updates to interested stakeholders

## Key Questions

The following is a non-comprehensive list of questions that should be answered in this process:

### Strategic

1. Where does FAMU want to play in the Performance Based Funding model? What strategic initiatives should be implemented to ensure the University's sustained success within the Performance Based Funding model?
2. What are the strengths, weaknesses, opportunities, and threats to FAMU? What are our plans to capitalize on strengths and opportunities, while mitigating risks and threats?
3. How can FAMU mitigate the short- and long-term impact of COVID-19? (i.e., financial, admissions criteria, student profile, modes of instruction, student services, faculty training, infrastructure, fundraising)
4. How can the Board of Trustees, and key stakeholders, maximize our individual and collective network to advocate for FAMU among key stakeholders?

### **Academic**

5. What are the University's academic programs of distinction, and what are our aspirations for third party recognition of academic and research excellence?
6. Is the academic program quality and mix relevant, in demand, aligned with future workforce needs/new economy jobs, and yielding an acceptable return on investment? What new degree, certificate, and continuing education programs should be offered over the next five years? How will FAMU streamline its existing program offerings to increase efficiency?
7. Who is the ideal FAMU student, and what's working / not working about FAMU's recruitment approach and outcomes? (i.e., recruiting process, pipeline size, composition, student profile, intended majors, application → admission → enrollment ratio)
8. What faculty and staff size are needed to meet enrollment demand? (i.e., teaching loads, research initiatives)

### **Operational**

9. What are the financial, talent acquisition and succession plan implications of employing a faculty and staff workforce that is experiencing a rising number of retirements in recent years?
10. What is the state of the infrastructure, and implications for facilities plans? (i.e., physical property, facilities, state-of-the-art classrooms and labs, classroom capacity, space and seasonal utilization, residential housing capacity for freshmen and graduate students)

### **Financial**

11. What are the historical enrollment trends for FAMU and nationally? What are the recommended future targets? (i.e., composition of student mix, college-ready, in-state/out-of-state/international, level of students (FTIC, transfers, graduate), mode of instruction (i.e., in person, hybrid, distance learning), financial ready students, degree-seeking/continuing education students)
12. What are the historical trends and future needs for awarding scholarships? (i.e., merit, need-based aid, across levels – lower, upper, graduate, doctoral, professional)
13. How is the new budget operating model performing? How can revenue be maximized (i.e., city, county, state, national and federal) and expense be optimized to reinforce the strategic plan?
14. What outcomes have been achieved based on FAMU's research priorities? What research thrusts should FAMU stop/start/continue?
15. What are FAMU's fundraising priorities, goals, and initiatives to increase student, alumni, and corporate giving and the FAMU endowment? Should a capital campaign be initiated in the next 5-year cycle, and if so, for what purpose?

### **Experiential**

16. What are the barriers to fostering a culture of accountability that fully and consistently demonstrates our motto of Excellence with Caring in the customer experience, including but not limited to students and staff, across academic sites, in person and via distance learning?
17. What are the opportunities to improve, monetize, and capitalize on the FAMU tangible (i.e., property) and intangible assets (i.e., brand, reputation, intellectual capital), especially in an era of renewed focus

on justice, diversity, equity, and inclusion?

### Budget

The preliminary budget for this project is TBD, to include hiring an external consultant.

### Timeline, Milestones and Deliverables

	Task	Who	By When	Objective
Phase 1	<b>Project kickoff</b> <ul style="list-style-type: none"> <li>Engagement with President</li> <li>Form Strategic Planning Work Group (SPWG)</li> <li>Solicit and engage a consultant</li> </ul>	Robinson + Edington	April -May 2021	Plan
	<b>Landscape assessment - Review of the 2017-2022 Strategic Plan and data gathering/analysis</b> <ul style="list-style-type: none"> <li>Compare 2017-22 Strategic plan goals vs. actuals</li> <li>Compare 2017-22 budget vs. actuals</li> <li>Trend analysis of PBF metrics from 2015 to present</li> <li>Florida SUS historical comparison</li> <li>Case study analysis of state colleges and universities that have change their success outcomes trajectory (i.e., North Carolina A&amp;T, Georgia State)</li> <li>Historical building blocks of positive and negative drivers of funds and expenses (i.e., state funds, tuition, PBF, enrollment, attrition, instruction and research, administrative support, instructional workload, Plant operations &amp; maintenance, etc.)</li> <li>PBF &amp; budget funding model review and overview of changes</li> <li>Enrollment trends at FAMU, SUS, and peer institutions</li> <li>Student profile trends over time</li> </ul>	Edington + Johnson + SPWG + External Consultant	May-June 2021	Discover
	Engage the Chancellor, Board of Governors, and other key stakeholders to review of the Strategic Plans. priorities and understand what role socioeconomics play in student outcomes	Harper + Robinson + SPWG	June 2021	Discover
	<b>Conduct SWOT Analysis</b> <ul style="list-style-type: none"> <li>Include data-based headwinds, tailwinds, and barriers to achieving PBF metrics and 2017-22 strategic plan/ accountability plan metrics</li> <li>Survey diverse stakeholders, including but not limited to the BOT</li> <li>Solicit ideas around the evolution of the vision and innovative ideas</li> </ul>	Harper + Robinson + SPWG + External Consultant	June-July 2021	Discover/ Discuss
	<b>Present landscape assessment during BOT Retreat; align on Phase 2 priorities</b>	<b>Harper + Robinson + Edington</b>	<b>August 4-5 2021</b>	<b>Discuss / Align</b>
Phase 2	<b>Align talent for Phase 2</b> <ul style="list-style-type: none"> <li>Refine project scope and deliverables</li> <li>Form sub-committees</li> </ul>	Edington	Aug.-Sept. 2021	Plan
	Gather quantitative and qualitative insights via data analysis and stakeholder engagement to address project scope	SPWG Sub-committees	Sept.-Oct. 2021	Discover
	Sub-committees present insights, conclusions, points of discussion, preliminary strategic plan recommendations and budget scenarios/implications to Dr. Robinson and Trustee Harper	SPWG Sub-committees	November 2021	Align
	<b>Present preliminary insights, conclusions, strategic plan, and budget implications to BOT</b> <ul style="list-style-type: none"> <li>Address issues and next steps discussed during Retreat</li> </ul>	<b>Harper + Robinson + Edington</b>	<b>December 2021</b>	<b>Discuss</b>

	Refine strategic plan based on BOT feedback	SPWG Sub-committees	January 2022	Optimize
	Reassess and optimize mission, vision, and brand, if necessary	Harper + Robinson + SPWG	January 2022	Discuss
	Present revised strategic plan recommendations and budget scenarios/implications to Dr. Robinson and Trustee Harper	SPWG Sub-committees	February 2022	Align
	<b>Share revised Strategic Plan and budget implications to BOT</b>	<b>Harper + Robinson + Edington</b>	<b>March 2022</b>	<b>Discuss / Decide</b>
Phase 3	Stakeholder awareness and engagement	Harper + Robinson + SPWG	March-April 2022	Discuss
	Optimize strategic plan, gather, and analyze additional data, write narrative, and establish metrics / KPIs	SPWG Sub-committees	March-April 2022	Discover / Decide
	Finalize strategic plan and KPIs based on BOT and stakeholder feedback	Harper + Robinson + SPWG	May 2022	Decide
	<b>Present final FAMU Strategic Plan 2023-27 to BOT for approval</b>	<b>Harper + BOT</b>	<b>June 2022</b>	<b>Approve</b>
Approval and Socialization	<b>Present final FAMU Strategic Plan 2023-27 to BOG for approval</b>	<b>Harper + Chair Lawson</b>	<b>July 2022</b>	<b>Approve</b>
	Socialize final, approved FAMU Strategic Plan 2023-27 with key stakeholders	Chair Lawson + Harper + Robinson + Edington	Aug.-Sept 2022	Inform

### Project Communication Plan

#### BOT and STRATEGIC PLANNING WORK GROUP

- Maintain project plan with tasks, timelines, and status for Strategic Planning Work Group **(TBD)**
- Establish standard templates to drive efficiency **(TBD)**
- Establish shared drive to enable access, efficiency, and version control for Strategic Planning Work Group **(Johnson)**

#### EXTERNAL

Quarterly update, at minimum, and executive summaries of meeting notes on publicly available microsite **(Edington + Harper + Miles)**

- Landscape assessment – what has changed since the last strategic plan? Conclusions from data analysis
- Solicit broad-based feedback – SWOT analysis, priorities, etc.

Humbly submitted,

*Trustee Kristin Harper*