More than Dining: Becoming a True Campus Partner

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Setting the Stage
Our Conversation Today

As a result of our time together today:

1) Understand key dimensions of Thriving
2) Understand top concerns of college leaders
3) Reflect on possibilities within your role
Reflection Question...
Who will come to your defense when they decide to switch dining contracts? And why?
How Credo is Serving
Why is Credo here?

- **400+** Independent college and university partners since 1995
- **120+** Campuses engaged per year
- **275+** Partner projects per year
- **50+** Services offered across critical areas of institutional strategy and operation
- **45+** Consultants, project managers and passionate higher education experts on the Credo team.
- **100+** Sitting vice presidents, deans and directors from campuses around the country in our affiliate network
We are proud to have served hundreds of diverse institutions with a range of geographies, populations, sizes, selectivity, and denominations.
Two Conversations
The Thriving Framework
We wrote the book (literally) on thriving for higher education

Through years of higher education consulting, nine elements emerged as key drivers for success.

The Thriving Framework
WHERE thriving institutions focus their energy

The Thriving Framework

HOW thriving institutions do their work
• The vision is inspiring, motivating, succinct, and memorable.
• The vision and refined mission emerge after initial planning events occur.
• The institution has made the necessary collaborative efforts for the vision to be owned by all constituencies.
• The vision gives life to the strategic plan of the college or university.

Mission is what you do... and is long term.

Values are why you do what you do... and are long-term.

Vision is where you are going... how you will translate your mission in this planning period.

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**Mission** is what you do … and is long term.

**Values** are why & how you do what you do … and are long-term.

**Vision** is where you are going … how you will translate your mission in this planning period.
VISION

Thriving institutions craft a concise, compelling vision to live out their mission.

1. Does your area vision statement connect back to the institution’s?
2. When you talk about what you do, how often, how easily, and how eloquently do you connect your work to the institution’s mission?
3. What % of your team knows how they contribute to something bigger?
4. What is most important to the institutional agenda, and how do you contribute to it?
PEOPLE & PRIDE

Thriving organizations are proud of the work they do.
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- Strategic investments are made in people, programs, and spaces (virtual and physical).
- Recognition and celebration are normal parts of organizational operation.
- The community is consistently and strategically affirmed.
- Levels of constituency engagement are increasing.
- Elements of regional and national visibility are leveraged.
Thriving organizations are proud of the work they do.

1. How does your team connect outside of dining?
2. What makes your team proud to work with you?
3. How do you contribute to celebration and pride?
4. How does “social-distanced dining” turn into something amazing?
ORGANIZATIONAL STORY

Thriving organizations know who they are, know their constituents and influencers, and communicate clearly and strategically.
MARKET RESEARCH IS CENTRAL TO UNDERSTANDING CURRENT REALITIES.

There is an explicit and consistent understanding of brand and value proposition(s).

Marketing messages are outcome driven.

The organization’s story is internally and externally shared.

Marketing resources are organized for success.

THRIVING ORGANIZATIONS KNOW WHO THEY ARE, KNOW THEIR CONSTITUENTS AND INFLUENCERS, AND COMMUNICATE CLEARLY AND STRATEGICALLY.

ORGANIZATIONAL STORY

The Real You

The Perceived You

What (relevant) people want

Brand
ORGANIZATIONAL STORY

Thriving organizations know who they are, know their constituents and influencers, and communicate clearly and strategically.

1. How well do you connect with the messaging of the institution?
2. How well do you tell your story internally & externally?
3. Do you know how key partner groups perceive you?
4. Who will come to your defense when someone wants to switch dining contracts?
Thriving organizations know that urgent times call for strong leadership grounded in trust, collaboration, and action.
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- Leadership teams are functional and effective.
- There is an appropriate balance between leadership and inclusivity.
- Timely decisions are made with less processing, and more efficient preparation.
- Shared-goals exist, and bad-mouthing is contrary to the culture.
- You have a default to action.
- The community has been thoroughly educated about changes and trends relevant to its work.
1. Do you use the talents of all your team to their fullest extent?
2. Does your team know → understand → support campus values?
3. Is there more than a normal amount of tension between different stakeholder groups? (How well do you get along?)
4. If dining services were a leader on campus, what would that look like?

Thriving organizations know that urgent times call for strong leadership grounded in trust, collaboration, and action.
INTEGRATED VALUE PROPOSITION

Thriving organizations are characterized by programs and services with clear purpose and consistently demonstrated value.
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- Unwavering attention is paid to innovation in outreach, education, and research.
- The organization has a strong orientation toward customer service.
- Learning represents a strong integration between all groups.
- All stakeholders know the value of the organization.
- The organization continually assess its value and refreshes its offerings to provide the highest service to the most stakeholders.
- Success metrics are improving consistently.
INTEGRATED VALUE PROPOSITION

Thriving organizations are characterized by programs and services with clear purpose and consistently demonstrated value.

1. How easy would others say is it to work with your department?
2. What do you do that others can’t/don’t do?
3. Do you say YES to ideas from around the college?
4. What would be different if you were not just an organization that helps others live, but one that they couldn’t live without?
Thriving organizations recognize that the execution of their mission and vision is dependent upon financial health.
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- Program possibilities for the future drive entrepreneurial thinking about new revenue streams.
- Metrics are established and used for adding and deleting initiatives.
- The budget process is conservative.
- Predictive financial models are being used to inform decision making.
<table>
<thead>
<tr>
<th></th>
<th>Seven Legal Ways to Get Resources</th>
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<tbody>
<tr>
<td>1</td>
<td>Grow</td>
</tr>
<tr>
<td></td>
<td>more new clients, better retention</td>
</tr>
<tr>
<td>2</td>
<td>Raise</td>
</tr>
<tr>
<td></td>
<td>donations, annual fund, campaign, major gifts, grants</td>
</tr>
<tr>
<td>3</td>
<td>Borrow</td>
</tr>
<tr>
<td></td>
<td>bond issue, other traditional financing, borrow from yourself</td>
</tr>
<tr>
<td>4</td>
<td>Shift (the hardest way)</td>
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<tr>
<td></td>
<td>stop doing something to do something else and/or do less of one thing to do more of another</td>
</tr>
<tr>
<td>5</td>
<td>Focus</td>
</tr>
<tr>
<td></td>
<td>get more with existing resources through training and efficiencies</td>
</tr>
<tr>
<td>6</td>
<td>Alternate</td>
</tr>
<tr>
<td></td>
<td>create new revenue streams</td>
</tr>
<tr>
<td>7</td>
<td>Partner</td>
</tr>
<tr>
<td></td>
<td>a continuum with cooperation on one end and merger on the other</td>
</tr>
</tbody>
</table>
Thriving organizations recognize that the execution of their mission and vision is dependent upon financial health.

1. Is the budget arranged with an eye toward partnerships and collaborations?
2. Are you willing to invest beyond what the contract requires?
3. Which of the 7 above can you help with more?
Thriving organizations focus on virtual and physical spaces that are transformative to the student experience.
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- Planning supports engaged learning inside the traditional classroom and non-traditional virtual arenas.
- Engagement spaces are being designed for versatile and creative uses.
- Physical spaces communicate the organizational story.
- Special attention is focused on “experience planning.”
- Investments in technology are firmly tied to mission and vision.
1. Do spaces tell the story of the mission, the campus, and your students?
2. Do spaces facilitate interaction, collaboration, and engagement?
3. What does a dynamic & innovative Food Service operation look like... virtually?

Thriving organizations focus on virtual and physical spaces that are transformative to the member experience.
HABIT OF REFLECTION & INTENTIONALITY

Thriving organizations habitually ask themselves if what they are doing is working, and if not, they change.
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- Collected data is used strategically, evaluated for relevance and usefulness, and considered when making course corrections.
- The organization decides where to focus, collects relevant data, and acts.

HABIT OF REFLECTION & INTENTIONALITY
1. How does the organization measure the effectiveness of its work?
2. Can you demonstrate quantitative and qualitative evidence of value?
3. What data do you have that can help others?
4. How can you use data in new and innovative ways?

Thriving organizations habitually ask themselves if what they are doing is working, and if not, they change.
Thriving organizations create bold, living plans, paying close attention to connection and communication.
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- Planning reflects clarity, transparency, and agility.
- Planning is collaborative, but efficient.
- Planning is focused around action and deadlines.
- Budget planning is aligned with strategic initiatives.
- Time for innovation and strategy replaces the time for word-smithing and operational issues.
Thriving organizations create bold, living plans, paying close attention to connection and communication.

1. Are your priorities and future planning connected to the college’s vision?
2. What else are you positioned to do well?
3. Do people in your organization have permission to be bold?
4. What can you do that would be a game-changer on your campus? In your industry?
The Lens of the President
WHERE thriving organizations focus their energy

Framework for Thriving Organizations

HOW thriving organizations do their work

- Vision
- Culture of Innovation & Planning
- Habit of Reflection & Intentionality
- Courageous & Collaborative Leadership

Organizational Story

People & Pride

Net Revenue & Strategic Finance

Transformative Experiences

Integrated Value Proposition
WHERE thriving organizations focus their energy

Diagnostic for Thriving Organizations

HOW thriving organizations do their work

157 measures
9 categories
1000+ Leaders

Integrated Value Proposition
Transformative Experiences
Net Revenue & Strategic Finance
People & Pride
Organizational Story

Vision
Culture of Innovation & Planning
Habit of Reflection & Intentionality
Courageous & Collaborative Leadership
URGENCY

MIND THE GAP
The Lens of the President
Sample Statements

• Student learning and success is a high priority for our leadership team.

• Campus places and spaces foster a variety of forms of social engagement.

• There is data collected by the institution which is not used for strategic purposes.

• Strategic objectives are clearly measurable.
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2. Campus places and spaces foster a variety of forms of social engagement.

3. There is data collected by the institution which is not used for strategic purposes.

4. Strategic objectives are clearly measurable.

Quiz - What statement has the highest urgency for Presidents?
1. Student learning and success is a high priority for our leadership team.

2. Campus places and spaces foster a variety of forms of social engagement.

3. There is data collected by the institution which is not used for strategic purposes.

4. Strategic objectives are clearly measurable.

Quiz - What statement has the highest urgency for Presidents?
Presidents... Items of Top Urgency:

1. “There are data that are collected by the institution that are not used for strategic purposes.”

2. “Each vice-president at the institution has a strong back-up person on his/her team.”

3. “We are consistently meeting our net revenue goals in each of the new student enrollment areas.”

4. “There is a dashboard of key indicators that would allow us to know the strategic plan has been implemented successfully.”

5. “There is a tradition of meeting or exceeding institutional graduation rate goals.”
Presidents... Items of Top Urgency:

6. “Our student success plan is comprehensive and includes all areas of our institution.”

7. “A robust assessment plan for administrative departments is in place.”

8. “Our institutional strategic initiatives are largely operational in nature.”

9. “We have a protocol for appropriately adding and deleting academic and co-curricular programs.”

10. “The institution seems to have a "silo" culture.”

11. “There is an annual strategic planning process by division or department that is closely tied to our institution's strategic initiatives.”
Quiz- Where do Presidents have the greatest disconnect in urgency compared to the other leaders on campus?

1. Branding
2. Finances
3. Morale
4. Long-Range Planning
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1. Branding
2. Finances
3. Morale
4. Long-Range Planning
More Urgent to Other Campus Execs than to Presidents

**MORALE AND TENSION** – Tension with faculty; people feeling overworked; trust among the leadership; collaboration; feeling of well-being and morale on campus

**Program Management** – admissions funding; research and intentional decisions around academic program creation and expansion; recruitment
+ More Urgent to **Student Affairs** than to **Presidents**

**SPACE & PLACE** – Deferred maintenance; space for best practices and cross-group engagements

**COMMUNICATION** – Well-informed, consistent, clear and transparent
+ More Urgent to CFOs than to Presidents

$\textdollar\textdollar\textdollar\textdollar\textdollar\textdollar$– Revenue, deferred maintenance, and review (read profitability) of programs
To Get Senior Leadership’s Attention

1. Bring (organized, connected, and actionable) data.
2. Connect to the strategic plan and assessment. Demonstrate how new ideas are strategic (not operational).
3. Position professional development as developing strong back-up leadership.
4. Position communication and morale initiatives as counters to ‘silo’ worries.
5. Highlight how objectives connect to/serve enrollment, retention, & advancement goals.
6. Get on the dashboard! ...or produce and share your own.
Lens of The President

1. What are the top strategic objectives of the colleges you serve?
2. What’s on their dashboards?
3. How do you contribute to those priorities?
In the end, it all comes back to your mission.
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QUESTIONS?
THANK YOU!

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