

# CHARTING OUR COURSE

THE **ELON**  
**STRATEGIC**  
*planning* **process**



**ELON**



## Dear Elon Community,

Our culture of inclusive strategic planning has led to decades of success. As we enter the final year of the Elon Commitment strategic plan, we have given considerable thought to effectively staging our next planning cycle. An essential feature of successful strategic planning is to create opportunities for many voices to contribute their own vision for the future of the university. I am confident that a process that synthesizes the ideas of our entire community will result in a compelling and forward-thinking strategic plan. As an Elon student once told me in class while reflecting on the value of group projects, “The wisdom is always in the group.” Our Elon community is indeed a wise group.

To prepare for an inclusive strategic planning process, we have developed this Elon University strategic planning guidebook as a resource to assist each unit, department, and group of stakeholders in thinking about Elon’s future. When I shared this concept with alumnus and longtime trustee, Noel Allen, he chuckled and showed me a yellowed copy of the “Guide for Long Range Planning,” that President Emeritus Earl Danieleley authored in 1966 when Noel served as a student member of the strategic planning committee. There is something comforting and powerful in knowing that a similar strategic planning process has shepherded Elon’s success for more than five decades.

Much of the next 18 months will be spent on conceptualizing the vision for Elon in 2030 and beyond. One challenge with any strategic planning process is keeping focused on the “big picture” vision before getting mired in details or action steps. Therefore, in the pages that follow, we have offered several exercises that provide methods to keep the conversation at the visioning level. In January 2020, after the plan has been drafted, reviewed by the campus, completed, and adopted by the Board of Trustees, we will establish working groups that will help develop a ladder of tactical steps to achieving the vision mapped out by our community.

Thank you for taking time during this academic year to think about what’s next for Elon University. I remain enormously proud of our shared sense of ownership in this university. Let’s work together to ensure Elon’s continued advancement and bright future for the generations to come.

In gratitude for your service,

**Connie Ledoux Book**  
President



## Table of Contents

Timeline & How to Get Involved	2
Key Ideas Form	4
Optional Exercises	5
Department, Program, or Unit Reviews	9
Appendix	
.....	
Strategic Planning at Elon	10
Elon Dashboard	12
Strategic Planning Committee	13

# Timeline & How to Get Involved

Elon's 18-month planning process will be fueled by the ideas of students, faculty, staff, alumni, parents, and friends and will result in a new strategic plan beginning January 2020.

**We invite all members of the Elon family to participate in the development of our next plan.**

**Here's what the process will look like . . .**



**And here's what will occur and how you can be involved in each phase.**

## **Fall 2018** Phase I: Invitation to Participate

- President Book announces strategic planning process, how to get involved, committee membership/charge, and community working groups
- Strategic plan website, email account, and handbook released
- On- and off-campus meetings begin with Elon constituents to gather input on next plan
- Unit, department, and program-level strategic conversations begin

### **Entire Elon family is invited to:**

- Attend sessions & discussions (<https://www.elon.edu/u/administration/president/strategic-plan-2030/>)
- Answer questions on white boards across campus starting in October
- Take all Elon constituent survey in November
- Submit ideas to [strategicplan@elon.edu](mailto:strategicplan@elon.edu)

### **Units, departments, and groups are invited to:**

- Invite Strategic Planning Committee members to attend meetings, discuss the process, or lead unit-level planning discussions
- Think about the next institutional plan and how departments can link to that plan
- Compile and analyze what departments have completed and how they have engaged in or supported the Elon Commitment strategic plan
- Engage in unit level planning. Feel free to use optional activities listed later in this guidebook.

## Spring 2019

## Phase 2: Generative Phase

- Committee shares survey results and feedback and engages Elon family in generating plan themes
- Unit, department, and program-level conversations continue
- Strategic plan committee retreat with working groups, and invited guests in January 2019

### Entire Elon family is invited to:

- Attend sessions & discussions to review survey data  
(<https://www.elon.edu/u/administration/president/strategic-plan-2030/>)
- Brainstorm plan themes
- Provide feedback on plan themes as they are generated
- Answer questions on white boards across campus
- Submit ideas to [strategicplan@elon.edu](mailto:strategicplan@elon.edu)

### Units, departments, and groups are invited to:

- Invite Strategic Planning Committee members to attend meetings, generate potential plan themes, or lead unit-level planning discussions
- Continue unit level planning
- Consider institutional plan themes and how departments can link to those themes

## Summer/Fall 2019

## Phase 3: Drafting and Fine Tuning

- Committee begins to draft plan based on community feedback
- Committee shares draft plan broadly for feedback from all Elon constituents
- Unit, department, and program-level conversations continue
- Committee brings draft plan to Trustees for approval in October 2019

### Entire Elon family is invited to:

- Attend sessions & discussions to provide feedback on draft plan
- Submit ideas to [strategicplan@elon.edu](mailto:strategicplan@elon.edu)

### Units, departments, and groups are invited to:

- Invite Strategic Planning Committee members to attend meetings, review draft plan, or lead unit-level planning discussions
- Continue unit level planning

## Spring 2020

## Implementation

- Working groups formed on key initiatives of new strategic plan
- Implementation, assessment, and reporting processes begin
- Unit, department, and program-level conversations continue

### How should units, departments, and other groups engage in the process?

#### All departments, units, and groups are encouraged to:

- Envision the future of Elon,
- Consider how departments can link to and support the next strategic plan,
- Review progress on current unit plans, and
- Engage in unit-level planning for 2030.

Departments, units, and groups can invite Strategic Planning Committee members to lead discussions or choose from the optional activities and exercises (one activity per semester) from the following pages.

Please submit key ideas and takeaways to the Strategic Planning Committee ([strategicplan@elon.edu](mailto:strategicplan@elon.edu)).

# Elon University Strategic Planning Key Ideas Form

Unit/Department: \_\_\_\_\_ Date: \_\_\_\_\_

Person we can contact with questions: \_\_\_\_\_

**Description of exercise:** \_\_\_\_\_

Great ideas from our discussion: \_\_\_\_\_

Comments: \_\_\_\_\_

**Submit to: [strategicplan@elon.edu](mailto:strategicplan@elon.edu)**

# Optional Exercises for Institutional Planning

To be completed by individual departments, programs, or units, or facilitated by members of the Strategic Planning Committee.

## Discussion Prompts

1. **Imagining Elon:** If you had all the money in the world and you were tasked with designing a brand new Elon, from the ground up . . .
  - a. What kind of institution would you design?
  - b. What values or priorities would you ensure undergirded the institution?
  - c. What would you include from the current university? What would you change?
  - d. How would you design change if you were functioning with a restrictive budget?
  - e. How would you prepare for emerging trends and threats to higher education?
2. **Teaching and Learning at Elon: What will teaching and learning at Elon look like in 2030?**
  - a. In 2030, what current learning outcomes, skills, competencies will remain central to teaching and learning at Elon? What will change?
  - b. What will the Elon curriculum look like in 2030? 2050? 2075?
  - c. How will technology, interdisciplinarity, STEM, artificial intelligence, data analytics, or other issues influence teaching and learning?
  - d. In 2030, what will people say about an Elon education
3. **Case Scenario:** If a competitor college or university were to move to Burlington, what might that institution look like? How might such a competitor structure their institution to best compete with Elon?
4. **Elon in 2030, 2050, and 2075:** What do you imagine Elon or your department, will look like in 2030?
  - a. What will be the primary goals?
  - b. What will be markers of success?
  - c. How will work be organized or prioritized?
  - d. What do you hope will be stay the same as today?
  - e. What do you hope will change or evolve?
  - f. What about in 2050? What about in 2075?
5. **The Elon Experiences:** Elon is considered a national expert in engaged and experiential learning. For decades, students have participated in the five Elon Experiences (study abroad, service learning, undergraduate research, internships/co-ops, and leadership).
  - a. In 2030, will we have the same five Elon Experiences?
  - b. Will we have additional experiences? Fewer experiences?
  - c. How will each of the five Elon Experiences be advanced in the next strategic plan?
  - d. What is next for Elon's mastery of engaged learning?
6. **Professional Development:**
  - a. What would most improve your experience as a faculty or staff member?
  - b. What would most enhance your professional development as a faculty or staff member?
  - c. Demographers tell us the American workforce will soon host five generations simultaneously. How can we better meet the needs of five generations working at Elon, and how can we help those generations to work well together?
  - d. What additional benefits would be worth considering for faculty and staff? If new benefits could only be added by trading off with existing benefits, what current benefits would you consider trading away?



# Start - Stop – Continue

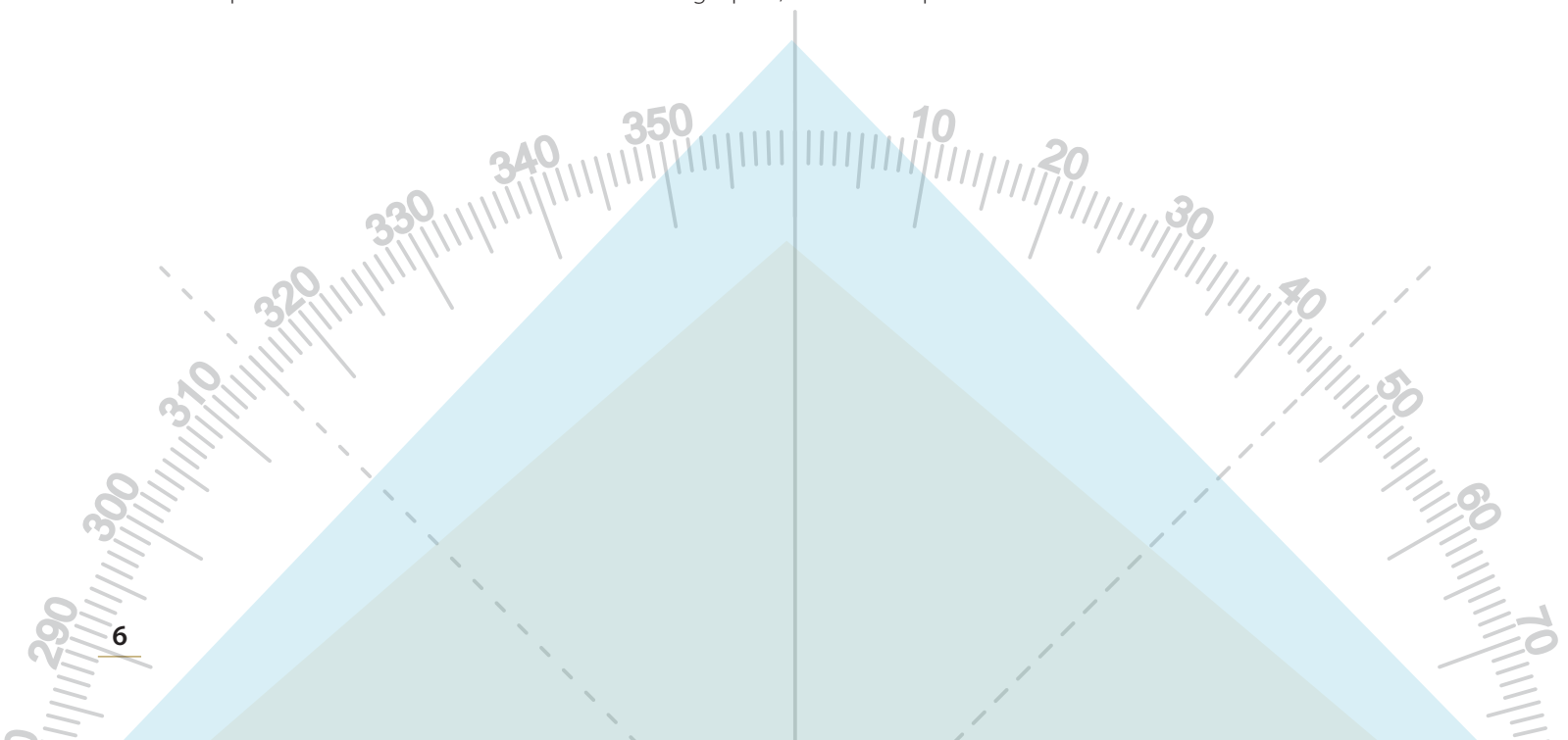
Effectively balancing all the initiatives and priorities of a university is an evolving process. This simple exercise to evaluate progress, effectiveness, and changing priorities can provide a fresh perspective on the vision for the future.

**IMPORTANT NOTE:** While it is easy to become focused on specific actions or tasks, this exercise is designed for thinking about higher level departmental initiatives or goals. At these early stages of the strategic planning process, thinking “at the 30,000 foot level” about larger goals and vision is most productive.

1. Set up three marker boards or flip charts (Start, Stop, and Continue). Participants take 5-10 minutes to brainstorm and then write their ideas on marker boards or flip charts to answer the following questions.

Start	Stop	Continue
<p><b><i>What should we start doing?</i></b></p> <p>List initiatives or ideas that:</p> <ul style="list-style-type: none"><li>• The department or university is not doing, but you think should be done.</li><li>• New ideas that have or have not been considered before.</li><li>• Ideas to address emerging trends, achieve important outcomes, or improve results.</li></ul>	<p><b><i>What should we stop doing?</i></b></p> <p>List initiatives or ideas that:</p> <ul style="list-style-type: none"><li>• Are not working or achieving desired outcomes for the department or university.</li><li>• No longer align with departmental or university mission or goals.</li><li>• Are no longer effective or valued.</li></ul>	<p><b><i>What should we continue doing?</i></b></p> <p>List initiatives or ideas that:</p> <ul style="list-style-type: none"><li>• Are working well for the department or university.</li><li>• Are successful or effective.</li><li>• Align well with mission and values of the department or university.</li></ul>

2. Each participant receives three sticky dots and votes by placing their dots next to the ideas they like best on the flip charts. They can put all three dots on one idea or distribute their dots on three different ideas.
3. Discuss which ideas receive the most and least votes. Consider, as a group, the ideas with the most votes, the implications of those ideas for the next strategic plan, and how to proceed with those ideas.





# Elon's Purpose Today and in 2030

In describing the purpose of the institution, the Elon University mission statement (printed below) makes certain commitments.

## Mission Statement

Elon University embraces its founders' vision of an academic community that transforms mind, body, and spirit and encourages freedom of thought and liberty of conscience.

To fulfill this vision, Elon University acts upon these commitments:

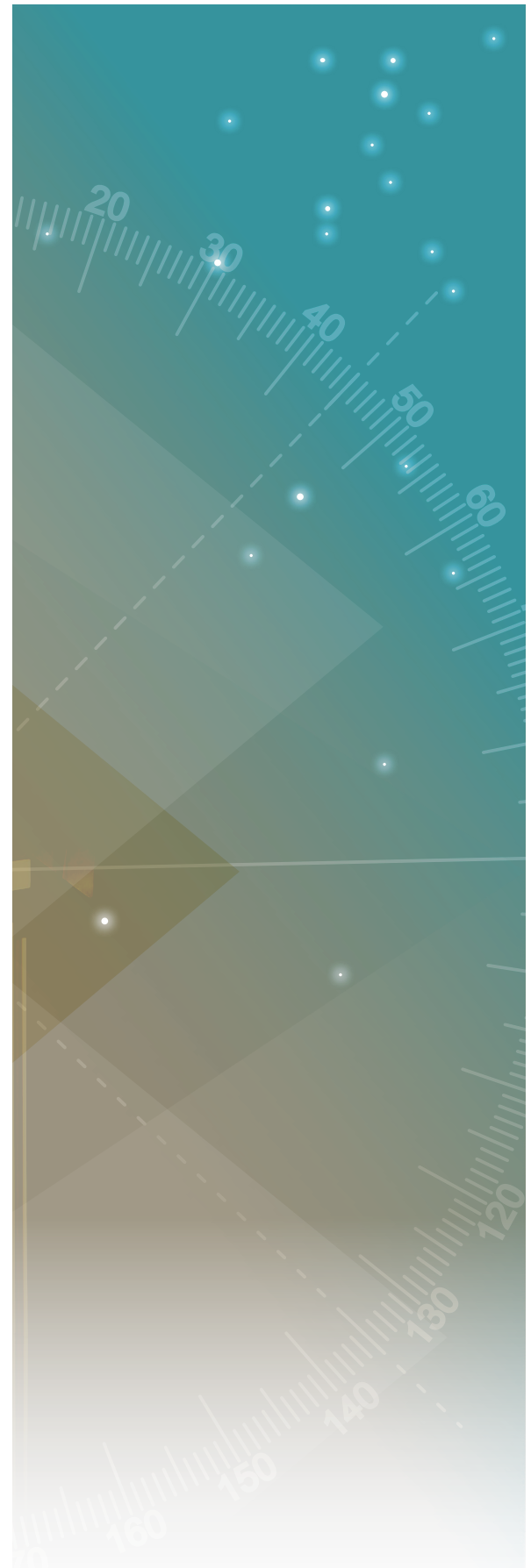
- a. We nurture a rich intellectual community characterized by active student engagement with a faculty dedicated to excellent teaching and scholarly accomplishment.
- b. We provide a dynamic and challenging undergraduate curriculum grounded in the traditional liberal arts and sciences and complemented by distinctive professional and graduate programs.
- c. We integrate learning across the disciplines and put knowledge into practice, thus preparing students to be global citizens and informed leaders motivated by concern for the common good.
- d. We foster respect for human differences, passion for a life of learning, personal integrity, and an ethic of work and service.

*Unanimously approved by the Elon faculty February 4, 2000 and the Elon Board of Trustees March 14, 2000*

*Unanimously amended by the Elon faculty December 3, 2010 and the Elon Board of Trustees January 5, 2011*

**Instructions:** Use the chart on the next page to determine and discuss the following questions:

1. What does each of these commitments look like or include currently?
2. What might each of these commitments look like in 2030?
3. How or why will the commitments be different in 2030?



Commitment	Describe Currently	Describe in 2030	Difference
Academic or intellectual community			
Transformation of mind, body, and spirit			
Freedom of thought and liberty of conscience			
Student engagement			
Excellence in teaching and scholarship			
Arts and sciences curriculum complemented by distinctive professional and graduate programs			
Putting knowledge into practice			
Preparing students to be global citizens			
Informed leaders motivated by concern for the common good			
Respect for human differences			
Passion for a life of learning			
Personal integrity			
An ethic of work and service			

# Department, Program, or Unit Reviews

## 1. Discussion questions for departments, units, or groups

- a. How well has our unit supported or met the goals outlined in the Elon Commitment?
- b. How well has our unit met departmental strategic goals?
- c. What are the emerging areas and best practices in our discipline/area? How might we engage those practices in order to advance Elon?
- d. How can we advance the overall mission of the university?

## SWOT Analysis

SWOT analyses help to prepare for a strategic plan, to better understand a unit's current status, or to strategically set future goals and objectives.

Participants are encouraged to brainstorm thoughts in each of the categories below. Groups then discuss each category, consolidating thoughts, and deciding on the most promising ideas and future directions.

FOCUS: INTERNAL	
<b>Strengths</b> <ul style="list-style-type: none"><li>• Capabilities and resources that enable your department to perform well,</li><li>• Tangible and intangible assets or abilities</li><li>• Core competencies or central features</li></ul>	<b>Weaknesses</b> <ul style="list-style-type: none"><li>• Disadvantages compared to competitors</li><li>• Something your department lacks or does poorly</li><li>• Tangible and intangible deficiencies</li></ul>
<b>Ideas for building on strengths:</b>	<b>Ideas for reducing weaknesses:</b>
<hr/> <hr/> <hr/> <hr/>	<hr/> <hr/> <hr/> <hr/>

FOCUS: EXTERNAL	
<b>Opportunities</b> <ul style="list-style-type: none"><li>• Emerging trends, issues, or changes that your department could act on or engage,</li><li>• Broad national or international opportunities or more singular issues or needs that impact your department</li></ul>	<b>Threats</b> <ul style="list-style-type: none"><li>• Events, issues, challenges, changes, demands, or pressures that could negatively affect your department</li></ul>
<b>Ideas for engaging opportunities:</b>	<b>Ideas for minimizing threats:</b>
<hr/> <hr/> <hr/> <hr/>	<hr/> <hr/> <hr/> <hr/>

## Strategic Planning at Elon: A Brief History

*Elon's emergence as a national university is the result of a series of four successive long-range strategic plans that were carefully created with broad community input and implemented with attention to measurable goals and accountability. The vision statements and goals of the plans form a timeline of Elon's impressive trajectory.*

### Plan for the 90s (1991-1993)

To ensure that Elon College is one of the best institutions of its type on the Eastern Seaboard.

Following completion of the Centennial Plan that coincided with Elon's 100th anniversary in 1989, trustees created the Plan for the 1990s, which was adopted in 1991. This plan had two primary goals: to achieve a higher level of quality in academic programs and to develop programs that provide a special identity and meaning to an Elon education.

The major accomplishments of this plan included the following:

- Revision of the General Studies curriculum
- Strengthening of business, education, communications, grad programs
- Enhancement of cultural awareness and programs in study abroad
- Investments in campus technologies
- Investments in faculty salaries and resources
- Creation of the Elon Experiences
- New facilities included Moseley Center, upgrades in the library and facilities for science and communications, and construction of Koury Center and renovation of Alumni Gymnasium

### Elon Vision (1994-1999)

To be, and be recognized as, one of the top private undergraduate institutions on the Eastern Seaboard.

The Elon Vision was a 17-point blueprint to reposition Elon on the higher education landscape – to move beyond the college's regional identity and prepare for the transition from college to university. The main goals were organized under four headings and included the following:

#### Academics

- Achieve excellence in the sciences and construct the McMichael Science Center
- Construct Belk Library and repurpose the previous facility (McEwen Building) for communications programs
- Advance many premier academic programs and strengthen graduate programs, including addition of the physical therapy program
- Enhance technology resources

#### Students

- Increased student quality, more selective admissions with higher test scores
- Establish the Fellows programs and increase financial aid
- Increase retention and graduation rate
- Increase school spirit with construction of Rhodes Stadium and transition to NCAA Division I athletics

#### Faculty/staff

- Higher faculty credentials, increased salaries, and advancing Elon's rankings in major college guides

**Increase available resources by building the endowment and expanding the annual fund**

## NewCentury@Elon (2000-2009)

*To be a national model of engaged learning, founded upon our traditions of innovation and community.*

NewCentury@Elon was carried out in two phases and had three overarching objectives: Enhance academic excellence, provide facilities to support excellence and provide resources to support excellence.

### Phase I accomplishments included the following:

- AACSB International accreditation for the Martha and Spencer Love School of Business
- ACEJMC accreditation for the School of Communications
- Addressed criteria for hosting a Phi Beta Kappa chapter
- Construction of the Ernest A. Koury, Sr. Business Center
- Development of the Academic Village for the Arts and Sciences
- Establishment of the Elon University School of Law
- Creation of the Center for the Advancement of Teaching and Learning
- Strengthening of the honors and fellows programs
- Increased participation in the Elon Experiences
- Major investments in library and technology resources
- Expansion of faculty development and sabbatical opportunities
- Targeted salary initiatives for faculty and staff
- Construction of Belk Track/White Field and continued progress in NCAA Division I competition
- Acquisition of South Campus property

### Phase II accomplishments included the following:

- Received approval to shelter a chapter of Phi Beta Kappa
- Academic Summit leads to increase in academic challenge
- Completion of the Academic Village
- Expansion of residential facilities, including The Oaks and first buildings in The Colonnades
- Expanded programs to attract and retain a diverse student body, faculty and staff
- Awarded innovation and creativity grants to students, faculty and staff to promote engaged teaching and learning
- Created additional international study centers similar to Elon's current centers in London and Costa Rica
- Established national program sites in several major U.S. cities
- Developed a premier program in career services and renamed the office the Student Professional Development Center.
- Broadened connections between the university and Alamance County governments, agencies and organizations
- Developed an environmental sustainability plan for the Elon campus
- Expanded partnerships with local school systems and established the Elon Academy
- Significantly increased the endowment, providing additional support for scholarships, academic programs, faculty development and other priorities

## The Elon Commitment (2010-2019)

*Engaged minds. Inspired leaders. Global citizens.*

In December 2009 trustees adopted **The Elon Commitment**, a 10-year plan with eight themes. See [www.elon.edu/eloncommitment](http://www.elon.edu/eloncommitment) for details about progress on completing the plan.

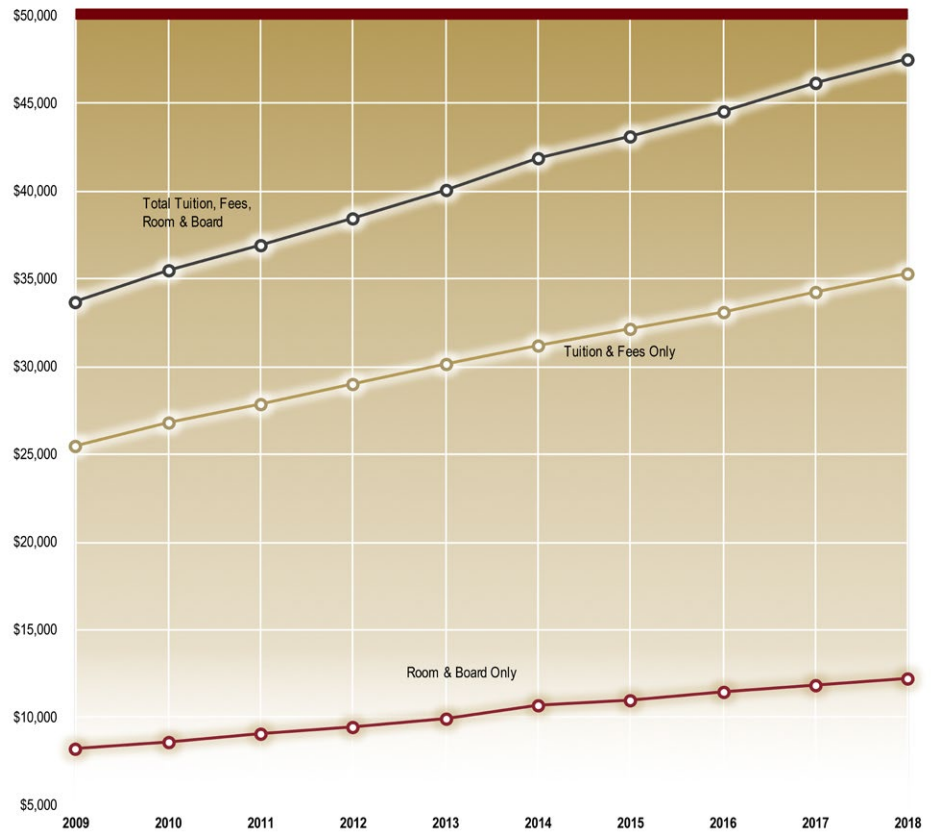
- An unprecedented university commitment to diversity and global engagement
- Supporting a world-class faculty and staff
- Attaining the highest levels of achievement across our academic programs
- Launching strategic and innovative pathways in undergraduate and graduate education
- Stewarding Elon's commitment to remain a best-value university
- Developing innovative alumni programs to advance and support the Elon graduate
- Establishing a national tournament tradition of athletics success along with the highest academic standards for Phoenix athletics
- Significantly enhancing Elon's campus with premier new academic and residential facilities and a commitment to protecting our environment

# Elon Dashboard

## TUITION AND FEES, ROOM AND BOARD 2009-2018

This graph shows the increase in tuition and fees, and room/board rates over a ten-year period.

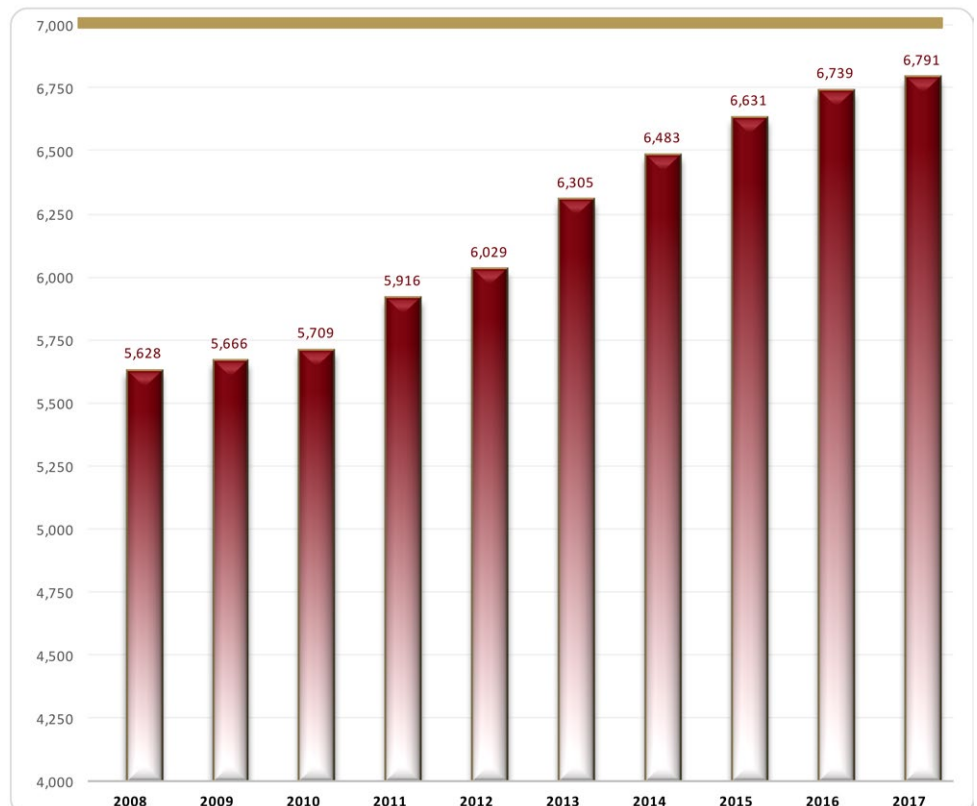
FALL	TUITION	FEES	ROOM	BOARD
2009	\$25,159	\$330	\$3,992	\$4,244
2010	\$26,480	\$347	\$4,192	\$4,456
2011	\$27,534	\$347	\$4,440	\$4,650
2012	\$28,633	\$347	\$4,690	\$4,790
2013	\$29,750	\$399	\$4,953	\$4,944
2014	\$30,848	\$399	\$5,231	\$5,436
2015	\$31,773	\$399	\$5,399	\$5,599
2016	\$32,685	\$419	\$5,728	\$5,767
2017	\$33,829	\$444	\$5,900	\$5,969
2018	\$34,850	\$469	\$6,020	\$6,210



## STUDENT ENROLLMENT 2008-2017

This graph shows a 10-year trend of total enrollment on a head-count basis. Enrollment has grown because of larger first-year classes, continuing improved retention, and the addition of new graduate

YEAR	UNDERGRADUATE	GRADUATE	TOTAL
2008	4,992	636	5,628
2009	4,995	671	5,666
2010	5,032	677	5,709
2011	5,225	691	5,916
2012	5,357	672	6,029
2013	5,599	706	6,305
2014	5,782	701	6,483
2015	5,903	728	6,631
2016	6,008	731	6,739
2017	6,045	746	6,791





## Committee Roster and Invitation to Contact Members

The following members of the Strategic Planning Committee have been tasked with considering all aspects of the university and its future. We encourage all members of the Elon family to feel free to contact committee members with ideas, suggestions, or questions or to email [strategicplan@elon.edu](mailto:strategicplan@elon.edu).

### Strategic Planning Committee

**Noel Allen '69 P '07**  
Trustee

**Amy Allocco**  
Associate Professor of  
Religious Studies

**Crista Arangala**  
Professor of Mathematics and Chair  
of the Department of Mathematics  
and Statistics

**Enrique Armijo**  
Associate Dean for Academic Affairs  
and Associate Professor of Law

**Brooke Barnett**  
Associate Provost, Academic and  
Inclusive Excellence, and Professor of  
Communications

**Emma Battle**  
Love School of Business Advisory  
Board Member

**Lauren Brown '17**  
Trustee

**Jeff Carpenter**  
Associate Professor of Education and  
Director of Teaching Fellows Program

**Shefali Christopher**  
Assistant Professor of Physical  
Therapy Education

**Cindy Citrone P'17**  
Trustee

**Charles Clohan '98**  
Trustee

**Caroline Dean '18**  
MHE Graduate Class of 2020,  
Trustee

**Louis DeJoy**  
Trustee

**Steve DeLoach**  
Professor of Economics and Chair of  
the Department of Economics

**Jon Dooley**  
Vice President for Student Life and  
Associate Professor of Education

**Wes Elingburg P '11**  
Trustee

**Ben Evans**  
Associate Professor of Physics

**Brian Feeley '03**  
Director of Alumni Engagement

**Mary Jo Festle**  
M.S. Powell Professor, Professor  
of History, and Associate Director,  
Center for the Advancement of  
Teaching and Learning

**Seth Fuller**  
Class of 2021

**Jason Husser**  
Associate Professor of Political  
Science and Policy Studies and  
Director of the Elon Poll

**Lauren Kearns**  
Professor of Dance and Chair of the  
Department of Performing Arts

**Deandra Little**  
Director, Center for the  
Advancement of Teaching and  
Learning and Associate  
Professor of English

**Buffie Longmire-Avital**  
Associate Professor of Psychology

**Lucia Lozano Robledo**  
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**Derrick Luster**  
Class of 2020

**Taylor Paradoski**  
Class of 2020

**Tim Peeples**  
Senior Associate Provost for Faculty  
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**Jim Piatt**  
Vice President for University  
Advancement

**Kelly Reimer '00**  
Director of Teaching and Learning  
Technologies

**Bob Shea**  
Associate Vice President for Business,  
Finance, and Technology

**Myrta Santana**  
Class of 2021

**Gabie Smith**  
Dean of Elon College, The College of  
Arts and Sciences and Professor of  
Psychology

**Jay Tiemann**  
Class of 2021

**Chris Tarpley**  
Class of 2017, Law School  
Class of 2019

**Mike Ward**  
Deputy Director of Athletics

**Randy Williams**  
Associate Vice President for Campus  
Engagement and Assistant Professor  
of Education

**Qian Xu**  
Associate Professor of  
Communications and Associate  
Director of Undergraduate Research

**Greg Zaiser '90**  
Vice President for Enrollment

**Co-Chairs**  
**Kerri Anderson '79**  
Trustee

**Jeff Stein**  
Associate Vice President, Chief  
of Staff, Secretary to the Board  
of Trustees, Assistant Professor  
of English

**Ex Officio**  
**Connie Book**  
President

**Ed Doherty**  
Chair, Board of Trustees

**Support Faculty & Staff**  
**Haya Ajjan**  
Associate Professor of Management  
Information Systems, Faculty  
Administrative Fellow for Innovation,  
Special Assistant to the President

**Dan Anderson**  
Vice President of University  
Communications

**Rob Springer**  
Executive Director of Institutional  
Effectiveness

**Presidential Support**  
**Gerald Whittington**  
Senior Vice President for Business,  
Finance and Technology,  
Associate Professor



