

# CONSULTANTS' REPORT ON THE FOLLOW UP PHASE FOR STRATEGIC PLANNING AT SANT'ANSELMO

## Introduction

The Strategic Planning Process fell into two separate and distinct phases and associated funded projects. The first phase had as its principal outcome the development and drafting of the plan and it began in May 2011, culminating in its presentation to the Abbott's Congress in September of 2012. The second phase, a follow-up project, started one year later in September 2013 and focused on the implementation of the plan over a two-year period that would lead up to the Abbott's Congress in September 2016.

The purpose of this report is to review the follow-up phase, assess what has been achieved to date, and propose areas of focus for the coming years to ensure a successful delivery of the strategic objectives that Sant'Anselmo has set itself.

## Project Objectives

The follow-up project identified a number of key outcomes:

*At the end of the first year of implementation [of the strategic planning process], it is necessary to consider the progress Sant'Anselmo has made towards achieving the goals it set itself, the issues that have arisen, and to consider revising the objectives set out in the plan in the light of this experience. This project will enable it to deliver these objectives.*

*Specifically, this project will achieve the following objectives:*

- [ The development of a review process and associated infrastructure to enable Sant'Anselmo to monitor the implementation of its strategic plan over an extended period;*
- [ The provision of external expertise offering an independent perspective on Sant'Anselmo's performance towards delivering the objectives set out in the strategic plan appropriate advice on specific issues arising.*

In addition, it specified that that the following outcomes would be delivered by the end of the project:

- [ The establishment of an enduring process for the management of strategic planning within Sant'Anselmo;*
- [ Revised Sant'Anselmo strategic planning action plans for 2014, 2015 and 2016 based on self-assessment, external analysis and informed discussion and decision.*

In the period between November 2013 and November 2015, the consultants met on five separate occasions, with one-day meetings taking place every 6 months in November and May. It was our practice, usually a month or so in advance of our meetings, to ask colleagues at Sant'Anselmo to provide an update on overall progress towards the objectives identified in the plan, both in table

format and in a report, and to identify items that would form the focus of the meetings. We would point out that these meetings have usually been very well attended by members of the Core Group and we have impressed by the level of engagement therein.

After each meeting, the consultants provided the Core Group with a written report summarising the principal points that had emerged and providing additional documentation, where requested or required. The latter often took the form of specific tools to enable Sant'Anselmo to deliver its objectives in specific areas of the plan.

### **Meeting agendas**

The key agenda points of the five meetings are summarised below.

#### ***Meeting 1 - November 2013***

The first meeting focussed on the following points:

- [ A review of the strategic plan to amend the objectives, the associated action plan and the timetable of delivery.
- [ A review of Sant'Anselmo's Academic Portfolio
- [ Marketing Activities
- [ Training and Incentives
- [ Communication and Management of the delivery of Sant'Anselmo's Strategic Plan

We highlighted that the underlying principle of the strategic plan is that all activities are dependent on the effective management and delivery of the items identified in Section B – Academic Activities – and that without significant progress here, all other actions become disconnected and lack focus. We indicated that those items relating to the development and delivery of an effective academic portfolio were the most important for Sant'Anselmo, and delivering these should be an overriding priority. The revised version of the strategic plan indicates the high level of focus that was indeed placed in this section of the plan, particularly in B.4 and B.5 throughout the follow-up phase.

Our principal recommendations for marketing were to focus on identifying the areas and activities to be marketed, and that these normally emerge from the pursuit and delivery of the objectives identified in Section B. Once these have been clearly articulated, the Core Group members should engage with the Director of Marketing to consider how best to promote them, to develop a clear timetable for delivery, and identify the resources available for effective marketing activities. We stressed the importance of a realistic marketing strategy, understood by all parties to ensure any mismatch in terms of expectations and timescales. The actions undertaken to develop a more strategic approach to Marketing during the follow-up phase are indicated in Chapter C.11 of the plan.

These discussions were linked to the need for the setting up of ongoing professional development as specific needs emerged through the pursuit and delivery of the objectives identified in Section B.

However, this has not been followed through in this round of strategic planning (Chapter D.15 Human Resources).

In order to ensure that implementation and monitoring of the strategic plan became central to its operation, we recommended that the strategic plan should become the principal agenda item for all meetings of the Rector's Council and that the individual members should be identified as being responsible for delivery of specific actions within the strategic plan. A communication process should be set up via the Strategic Planning Co-ordinator to ensure that support services and resource management areas were informed in a timely manner and given the opportunity to present questions and issues. This point became one that we returned to throughout the follow-up phase. Limited resources made it difficult for Sant'Anselmo to identify named individuals to take responsibility for the different sections and chapters of the plan.

### ***Meeting 2 - May 2014***

- [ Recruitment Targets and their relationship to the Mission and Vision of Sant'Anselmo
- [ Communication and Management of the Delivery of Sant'Anselmo's Strategic Plan
- [ Managing (Accelerating) the Delivery of Strategic Plan Objectives
- [ Development of the Sant'Anselmo Teaching and Learning Strategy

We were especially impressed with the developments highlighted under Chapters 4 Academic Profile and Chapter 5 Academic Portfolio as we had stressed the importance of these chapters in providing a basis for the implementation of Sections C and D. The student profile had been revised and recruitment targets lowered to what were considered to be more realistic numbers. We highlighted the importance of considering whether these revised targets would provide sufficient income for Sant'Anselmo to implement its strategic goals. These two chapters received ongoing attention and have been further revised in the new version of the plan.

While we were pleased to note that the Rector's Council has become the principal focus of management activities within Sant'Anselmo, implementation and monitoring of the strategic plan had not yet become central to its operations. In order to manage and accelerate delivery of the objectives, we recommended developing 6-month action plans that would form the basis of our future meetings.

We also discussed the Teaching and Learning strategy and considered the value of employing an external consultant to assist in its development. Our view was that this document, which will describe how the delivery of the academic portfolio (Chapter 5) will be supported by the practical application of Benedictine pedagogy towards the development of the Sant'Anselmo graduate characteristics (Chapter 4) is so central to Sant'Anselmo that it ought to be produced by those most familiar with that pedagogy – namely the academic faculty of Sant'Anselmo through the Core Group. While little progress has been made on this point, we are pleased to see that it is indicated as a key objective in the revised version of the plan.

### ***Meeting 3 -November 2014***

- [ Development of Teaching and Learning Strategy

- [ Communication and Management of the Strategic Plan
- [ Managing (Accelerating) the Delivery of Strategic Plan Objectives

We were pleased to see progress in revising the curriculum and we were especially pleased to see the progress that has been made in achieving targets for the recruitment of students. We also encouraged Sant'Anselmo to use the current draft of its Teaching and Learning Strategy as a first step in the process of defining its unique teaching and learning model. As previously mentioned, this has been identified as the key objective of Chapter B.5 in the revised version of the plan.

Most of the points considered during this meeting had been raised at our previous encounters. In particular, the need for the Core Group to stay engaged in the management of the specific issues which comprise the plan. We stressed the importance of identifying key actions that would be the focus of the institution's report to the Abbot's Congress in September 2016.

Sant'Anselmo raised the issue of finding sufficient capacity to deliver the actions identified. It had been an ongoing concern that the sheer volume of actions identified in the plan overstretched Core Group members and, as a consequence, several of the items identified in the plan had not been given to a responsible person or office. Progress had necessarily been limited or non-existent as a result.

We welcomed the conclusion reached at the end of the meeting - to widen understanding and ownership of the plan through a meeting to which all staff would be invited and to seek to identify those who would be given the responsibility of delivering the actions under the oversight of the Core Group and the Rector's Council. We warmly commended the Core Group in this course of action, although we later learnt that the initiative had not met with the planned outcomes.

#### **Meeting 4 - May 2015**

- [ Managing (Accelerating) the Delivery of Strategic Plan Objectives – towards an action plan for the next 6 months
- [ Development of a Sant'Anselmo Marketing Plan - towards an action plan for the next 6 months.

The principal focus was again on developing action plans and several models were presented that could be adapted to Sant'Anselmo's needs. We highlighted the importance of utilizing action plans as a means to achieve objectives and give credibility to those undertaking the tasks, to enable better organisation of time, resources and energy, thus leading to greater efficiency, and finally to help create stronger motivation for people to do what needs to be done, thus creating more accountability.

Since marketing was again identified as a key issue and it was taken as an example to develop an action plan.

Sant'Anselmo had a good sense of the activities it wanted to market – essentially the academic activities and that it also had a relatively clear understanding of the people and organisations to whom they wish to market their academic activities. These included monasteries and other Benedictine and Catholic organisations around the world.

Our belief was that Sant'Anselmo could use assistance in terms of identifying the appropriate methods through which it will market its activities, beyond the website . We stressed that it was important to recognise that the website is part of a wider marketing strategy which might also include publications, visits and events management. We recommended a clear plan of marketing activities to market the academic activities to its key partners and customers as identified and agreed by the Core Group; indicative resources to deliver them - including personnel, equipment and funding; a timetable for their delivery. Significant work was undertaken in the following 6 month period to develop a more strategic approach to marketing and this is highlighted in Chapter C.11 of the revised version of the plan.

### **Meeting 5 - November 2015**

#### **[ Managing the Strategic Plan**

Based on the key issues raised over the previous four meetings, this last meeting was used to highlight the importance of embedding the plan in Sant'Anselmo's day-to day activities through its management structures and processes, and to make the distinction between operational and strategic management. The points made during this meeting are listed in the section below.

#### **Key themes emerging from the follow-up phase**

During this follow-up phase, it was clear that some key themes emerged and were raised at a number of meetings. The first was the importance the Core Group placed on the development of Sant'Anselmo's marketing activities. The fruits of this work are becoming increasingly clear. Sant'Anselmo has upgraded its website and it now reflects both current activities in the Ateneo and serves as a window on upcoming developments. It is particularly encouraging to see the extent to which faculties are able to provide content on a systematic basis.

A second clear theme Sant'Anselmo's Teaching and Learning strategy. An initial document was developed, but little else was undertaken in this phase to enable this strategy to be implemented and make a meaningful impact on the delivery of academic courses. This has been recognised in the revised version of the Strategic Plan which identifies a Teaching and Learning Strategy as a key objective (Chapter B.6).

This is an example that brings us to the third theme, which has been perhaps the principal focus of our attention – the management of the strategic plan, the extent to which it has been embedded in the day-to-day life of Sant'Anselmo and how this is reflected in the management activities of the Rector's Council and other key management bodies.

During our time at Sant'Anselmo, we suggested various tools to ensure that the plan is more successfully embedded and used to guide management decisions. One tool suggested was a project management approach as well as a coordinated series of meetings through which work could be delegated to sub committees of the Rector's Council. Our final meeting was an exercise which

sought to demonstrate how this might work in practice, with the leaders of each of these sub-groups serving on the Rector's Council and providing a means through which strategic decisions can be taken and then communicated to those responsible for their delivery at the operational level. We sincerely hope Sant'Anselmo will engage with these tools and adapt them in a way that they can work effectively within their own institutional context.

### **Evaluation of project objectives**

In reviewing the initial project objectives, we feel that through the provision of regularly updated action plans, the project has succeeded in developing within Sant'Anselmo:

- [ *a review process and associated infrastructure to enable Sant'Anselmo to monitor the implementation of its strategic plan over an extended period;*

In themselves these reports have led to:

- [ *Revised Sant'Anselmo strategic planning action plans for 2014, 2015 and 2016 based on self-assessment, external analysis and informed discussion and decision.*

These have enabled us to deliver a third objective namely the provision of :

- [ *external expertise offering an independent perspective on Sant'Anselmo's performance towards delivering the objectives set out in the strategic plan appropriate advice on specific issues arising.*

The outcome is that Sant'Anselmo has been well placed to provide a detailed update of the plan that was presented to the Abbots' Congress in 2012 and to produce a revised document that builds on the achievements, recognises what remains undelivered and takes into account the new issues that have emerged.

The final outcome:

- [ *The establishment of an enduring process for the management of strategic planning within Sant'Anselmo;*

is worth further consideration. While the Core Group has overseen progress towards the plan, and has produced reports in preparation for these meetings, we consider that it would be worthwhile to undertake further efforts to ensure that this work leads to an 'enduring process'.

While we are pleased to see that the plan has been updated to highlight what has been achieved in this first round of strategic planning, it is also apparent that there are areas of the plan, most noticeably those in sections C and D, (for example, the provisions related to Human Resources) that remain largely untouched. While this is partly related to the ambition of the plan and the limited level of resources available, it is noticeable that these areas have not been assigned to a named person responsible for moving them forward, (in marked contrast for example to the sections under Marketing). Since most of the focus of the plan has been on Section B (Academic Activities), consequently Sections C (Support Activities) and D (Resource Management) have not been considered to any great extent.

Throughout our time at Sant'Anselmo, we have invited the Core Group to consider organisational issues, both the Ateneo's academic and management structures as well as the allocation of responsibilities within the plan to named persons. In our last session in November 2015, we sought to demonstrate how the plan could be effectively managed through a slight modification of the membership of the Rector's Council and the creation of sub groups that were largely aligned to the chapter headings within each section.

While Sant'Anselmo needs to consider the extent to which these alignments can be accommodated within the context of its history and its existing statutes, it is our view that the extent to which the strategic plan can be managed, still more 'embedded' in its day-to-day operations, remains dependent on the extent to which the senior management team is willing to consider and ultimately implement structural and organisation changes that place the delivery of the strategic plan as the primary task of its management activities.

While this would reflect a significant change in the current management of Sant'Anselmo, our shared experience over the last four and a half years is proof that colleagues at Sant'Anselmo are both willing and able to adopt and implement effective change - to the benefit of their students, faculty and colleagues and the whole institution and the community it serves.

We would like to end this report by extending our thanks to embrace the entirety of our work together. It has been a most enjoyable time and we wish Sant'Anselmo every success as it moves into a new round of strategic planning. We hope Sant'Anselmo will remain in touch and we look forward to hearing of its future endeavours.

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