


Strategic Resource Allocation


Eastern Washington University
January 17-18, 2023

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1



Why SRA?

- Most importantly, when carried out properly, it works
- It addresses all institutional resources
- It is not “one size fits all”
 - It is customizable to fit the institution’s unique situation and culture
- Previous actions can be considered when selecting recommendations to implement
- Fairness and transparency generate buy-in

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2

Dickeson Model

- First used at UNC in 1981
- Initially presented in *Prioritizing Academic Programs and Services* (Jossey-Bass, 1999)
 - Updated version published in 2010
- Successfully employed at hundreds of institutions and failed at others!
 1. Reduce and redirect resources
 2. Finance strategic plans
 3. Direct incremental resources
 4. Evaluate new program proposals

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3

3

Dickeson's Postulates (adapted)

1. Academic programs drive institutional costs
2. HE adds programs but rarely subtracts them
3. Too many “try to be all things to all people”
4. Insufficient resources to do everything well
5. Across-the-board cuts lead to mediocrity
6. Reallocation of resources is best option
7. Reallocation requires prioritization

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4

4

Dickeson Model Characteristics

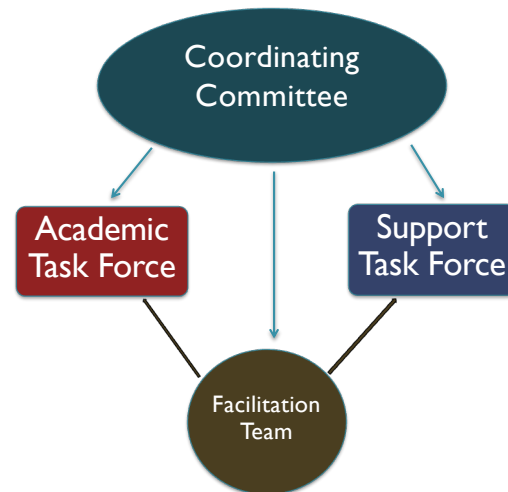
- Top down / bottom up
 - Carried out by those most affected by outcomes
- Data driven
 - Quantitative *and* qualitative
- Transparency with appropriate confidentiality
- Comprehensive
- Treats all activities fairly

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5

5



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6

6

Facilitation Team Members

- Jackie Coomes, Academic Affairs—co-chair
- Toni Habegger, Financial Services—co-chair
- Sam Armstrong Ash, Student Life
- Mark Baldwin, President's Office
- Brad Christ, Information Technology
- Deborah Danner, Human Resources
- Tessa Delbridge, Marketing & Communications
- Admir Djulovic, Financial Services
- Shawn King, Facilities & Planning
- Lance Kissler, Marketing & Communications
- Jake Morrison, Institutional Research
- Heather Veeder, Student Success, Planning & Policy

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7

Proven Approach

- Get organized
 - Identify coordinating committee
 - Identify facilitation group members
 - Appoint task forces
 - Agree on target (if applicable) and stratification goals
 - Target represents a specific financial or personnel amount to be reallocated

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8




Proven Approach *(Contd.)*

- Stratification refers to the specific categories in which programs and functions will be classified
- Based on extensive experience, the recommendation is for quintiles measured by amount invested

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9




Proven Approach *(Contd.)*

- Sample category labels
 - Invest (eligible for enhanced resources)
 - Maintain (continue with current resources)
 - Streamline (continue with reduced resources)
 - Transform (to improve effectiveness)
 - Disinvest (candidate for phase-out; subject to additional review by senior leadership)

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10




Proven Approach *(Contd.)*

- Develop communication plan
- Communicate with key stakeholders
- Educate the community / gather input
- Conduct kickoff training
 - Key decisions
 - Establish criteria and weights
 - Identify guiding resources
 - Agree on decision-making protocol

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11




Proven Approach *(Contd.)*

- Identify programs and functions
 - A common set of activities that can be discretely measured and consumes resources

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12




Proven Approach *(Contd.)*

- Resources include
 - People
 - Money
 - Space
 - Technology
 - Equipment
- Program / function illustration
- Assign programs and functions to respective task force

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13




Proven Approach *(Contd.)*

- Release lists for review / feedback
- Assemble relevant datasets
- Develop templates
- Test templates with pilot programs and functions
- Release template for review / feedback
- Establish schedule for template submissions
- Conduct template training

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14




Proven Approach *(Contd.)*

- Review and assess all submissions
- Categorize submissions in quintiles
- Produce report detailing recommendations
- Simultaneous review by institution leadership and stakeholders
- Feedback submitted to leadership
- Implementation overseen by leadership through governance process
 - Must adhere to all laws, contracts, policies, procedures, etc.
- Maintain system going forward

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15



Questions?

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16




Recommended Criteria

- For academic programs
 1. History, development, expectations
 2. External demand
 3. Internal demand
 4. Quality of inputs and processes
 5. Quality of outcomes

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17




Recommended Criteria *(Contd.)*

6. Size, scope, and productivity
7. Revenues / resources generated
8. Expenses / other costs incurred
9. Impact, justification, and overall essentiality
10. Opportunity analysis

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18




Recommended Criteria

- For support functions
 1. Impact, justification, and overall essentiality
 2. Internal demand
 3. Mandates and external demand
 4. Quality
 5. Cost effectiveness
 6. Opportunity analysis

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19




Why It Works When It Works

- Transparency
- Respected champions
- Credible participants, especially faculty
- Fairness
- Committed leadership
- Good—though not perfect—data
- Reasonable timeframe for completion
- Adequate support

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20




What Leads to Failure?

- Sacred cows
- Relying on “usual suspects”
- Token faculty participation
- Perceived inequities
- Leadership waffling / or unanticipated leadership turnover
- Corrupt data
- Rushing the process or taking too long
- Not pursuing recommendations

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21



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Questions, Comments, and Reactions?

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22