LVAIC STRATEGIC PLAN 2024-2027

Approved December 2023
Revised December 2025

Introduction

The purpose of LVAIC has always been to advance the success of its members through collaboration. LVAIC was founded in the late 1960s by the then presidents of the independent member institutions. It was the hope of those presidents that they could create a collaborative model that would provide their campuses with the same kinds of advantages that "systemness" provides to public institutions.

The needs of the member institutions are the underpinning of all LVAIC strategic thinking and planning. From there, we identify areas of collaborative opportunity and establish specific goals and initiatives aligning to and advancing the strategic priorities of the member institutions.

Table of Contents

- 2024-2027 Strategy Map and Strategic Plan
- 2023 Environmental Scan
- Planning Resources

2024-2027 STRATEGY MAP AND STRATEGIC PLAN

Mission

The Lehigh Valley Association of Independent Colleges is a community of independent colleges and universities growing stronger through collaboration.

Vision

LVAIC advances a culture of intentional and innovative collaboration that expands academic excellence, educational access, community engagement, and student experiences at each of its distinctive member institutions and positions the Lehigh Valley as a leading destination for higher education.

Guiding Principles
Adopted December 2020

LVAIC is the collective of the member campus communities and is committed to advancing the success of our students and the communities in which we live and work.

LVAIC collaboration is led by the presidents of our member campuses, who are committed to finding collective answers and opportunities and who are all actively involved in consortial decision making.

LVAIC leaders are committed to pushing the boundaries of collaboration and it is incorporated into their respective campus cultures.

LVAIC collaboration will focus on undertaking audacious initiatives that provide the greatest impact and resources will be prioritized based on number of campuses impacted.

LVAIC members are committed to collectively maximize the distinctiveness of each campus.

LVAIC members commit to candidly and respectfully raise and discuss areas of disagreement or competition.

LVAIC members acknowledge that while they compete in different ways, they are committed to undertake opportunities that, even if not advancing their individual success, will advance the collective success.

LVAIC nurtures and advances collaboration across all the members of its community through both peer groups and cross-functional groups.

LVAIC collaborative decisions will be data based, including return on investment or cost benefit analysis, and the data needed to make those decisions will be readily shared.

LVAIC collaborative initiatives will be intentional and aligned to consortial priorities as established in strategic plans.

Essential Elements of LVAIC Collaboration

Essential Elements	Connecting	Cooperating	Coordinating	Collaborating
Vision & Relationships	▪ Basis for networking is between individuals. ▪ Priorities are primarily individual and/or social. ▪ Interaction is limited to specific events.	▪ Basis for cooperation is usually between individuals but may be mandated by institutions. ▪ Institutional mission and goals unlikely to be considered but departmental priorities may be considered. ▪ Interaction is on an as needed basis/no time limit.	▪ Individual relationships are supported by the institutions. ▪ Both institutional mission and goals and departmental priorities are reviewed for compatibility. ▪ Interaction usually around one specific project or task.	▪ Commitment of the institutions is fully behind each individual. ▪ Common, new goals and objectives are created. ▪ One of more projects are undertaken for longer-term outcomes.
Structure, Responsibilities, & Communications	▪ Relationships may not yet be clearly established. ▪ No shared planning is required. ▪ No formal information exchange mechanisms established.	▪ Relationships are established but informal, each institution functions separately. ▪ Minimal shared planning is required. ▪ Information is conveyed or exchanged as needed.	▪ Institutions assume needed roles but still function separately. ▪ Some project-specific planning is required. ▪ Communication roles are established and channels for interaction have been developed.	▪ New structure and/or formal division of labor is created. ▪ Comprehensive planning is required, including outcomes/measures of success. ▪ Many levels of communication and channels for interaction have been developed.
Authority & Accountability	▪ Leadership and authority rest solely with individual institutions.	▪ Authority rests solely with individual institutions. ▪ Leadership is unilateral and control is central. ▪ All authority and accountability rests with each institution.	▪ Authority rests on each institution but there is coordination of decision making. ▪ Some sharing of leadership and control exists. ▪ Some shared risk is assumed, but most authority and accountability rests with institutions	▪ Authority is determined collectively by the group to balance ownership. ▪ Leadership is dispersed and control is shared and mutual. ▪ Equal risk is assumed and shared by each institution.
Resources & Rewards	▪ Resources are separate. ▪ Minimal reward, likely individual.	▪ Resources are separate but may be shared on occasion. ▪ Minimal reward, may be mutual.	▪ Resources are identified more clearly and can be made available for a specific purpose or project. ▪ Rewards are mutually acknowledged.	▪ Resources are pooled or jointly secured for long-term projects/efforts. ▪ Institutions share in the products and recognize that more is accomplished together than individually.
Trust	▪ Very low	▪ Low	▪ Moderate	▪ High

Adapted from Collaboration: What Makes It Work (Mattessich et al., 2001, p.61) and from works of M. Blank, S. Kagan, A. Melaville, and K. Ray.

Strategic Priority
Optimized Resources

Goal	Desired Outcome	Initiatives
Administrative Operating Efficiency	Operating costs savings resulting from streamlined administrative processes and systems	• LVAIC Health Insurance Consortium • Shared payroll contracts and staff • Shared HRIS and staff
Administrative Cost Savings	Operating cost savings resulting from leveraged procurement	• Intentional consortial sourcing • Leveraged insurance buying
Operational Innovation	Re-deployable resources resulting from redesigned processes and operations	• Shared library storage
Expanded Student Opportunities	Increased student access to expertise and opportunities through shared intellectual and physical resources	• Coordinated course scheduling • Strategically planned shared courses • Shared Faculty/Adjuncts • PA Basic Needs Network

Strategic Priority
People Excellence

Goal	Desired Outcome	Initiatives
Lehigh Valley reputation attracts and retains talent	The reputation of the Lehigh Valley higher education community is a competitive advantage in recruiting and retaining talented faculty and staff.	• VITAL faculty network • Recruitment of dual career employees
Employee engagement and community connection	High levels of employee engagement increase retention and enhance recruiting.	• Lifecycle programming • Annual higher ed issues symposium • Optimize Communities of Practice • Shared FT positions to meet PT needs
Inclusive higher education community	The LVAIC community welcomes and embraces the diversity of identities and cultures of its members.	• Affinity Groups • Collaborative Programming for Inclusive Excellence • Community and Belonging Certificate Program for Employees
Ongoing growth and development for all employees	Cost-effective employee growth and development opportunities improve performance and teaching, increase engagement and satisfaction and enhance recruiting and retention.	• Faculty development • Management & leadership development • LVAIC wide groups specific professional development programs

Strategic Priority
Impactful Presence

Goal	Desired Outcome	Initiatives
Lehigh Valley reputation attracts and retains students	Increased regional and statewide visibility of the higher education resources in the Lehigh Valley	• PA Transfer Pathways project • Multi-campus high school guidance counselor tour
Strong community relationships	Increased local and community visibility and accessibility to the LVAIC institutions	• Shared pre-college education and advising

LVAIC 2024-2027 Strategy Map

Mission: The Lehigh Valley Association of Independent Colleges is a community of independent colleges and universities growing stronger through collaboration.

Vision: LVAIC advances a culture of innovative and intentional collaboration that expands academic excellence, educational access, community engagement, and the student experience at each of its distinctive member institutions and positions the Lehigh Valley as a leading destination for higher education.

Strategic Priority	Optimized Resources				People Excellence				Impactful Presence	
Goals	Administrative Operating efficiency	Administrative Cost Savings	Operational Innovation	Expanded Student Opportunities	LV reputation attracts and retains talent	Employee engagement and community connection	Inclusive higher education community	Ongoing growth and development for all employees	LV reputation attracts and retains students	Strong community relationships
Maintain at current level Year 1	LVAIC HIC			PA Basic Needs Network	VITAL faculty network to build adjunct engagement	Lifecycle Programming		Faculty development including summer workshop	Transfer Pathways statewide project	
								Management and leadership development (Mgmt certificate, HE Leadership Institute, Dept Chair)	Multi-campus high school counselor tour	
Grow or explore Year 1	Shared Payroll contracting	Intentional consortial sourcing and contracting including licensing (supported by spending analysis)	Shared library storage/archive and technical services and supporting courier(planning)			Annual or semiannual LVAIC wide HE issues symposium or series	Maintain and expand Affinity Groups			
						Optimal leveraging of Communities of Practice	Shared DEIB programming			
Grow or explore Year 2	Shared payroll staff	Leveraged procurement of liability and general insurance		Coordinated scheduling of low enrollment courses, shared faculty/adjuncts, and strategically planned and developed shared courses	Collaborative recruitment efforts for dual career/ coordination with LINC	Grow offerings of Lifecycle Programming	DEIB certificate program for staff	Centralized professional development program for target groups (ie Mgrs, dept chairs, etc)	Multi-campus high school counselor tour	Shared pre-college education and advising in local middle and high schools including financial planning and college applications
	LVAIC HIC					Shared full time hires to meet part-time needs		Expanded capacity Management and leadership development (Mgmt certificate, HE Leadership Institute, Dept Chair)		
Grow or explore Year 3	Shared HRIS system and administrative employees							Faculty development including summer workshop		
Potential for future			Shared outsourced 24/7 mental mental health services					Certification and licensing education for skilled trades		
								Shared platform for online training and compliance		

Proposed Schedule and Resource Requirements

Optimized Resources

Goal: Administrative Operating Efficiency

Initiative	Target	Actions	Resources
LVAIC HIC	Cost trend line at or below national average	Y1 – Maintain Y3- Explore stop loss restructure, growth	• Existing LVAIC • Existing consultant
Shared Payroll Contracts and staff	Align processes to streamline staffing requirements	Y1 – Explore Y2 – Implement Y3 - Following implementation of shared payroll contract	• Existing LVAIC • HR, Controllers • Redeployed shared resource
Shared HRIS and staff	Increased capabilities at same or reduced cost	Y3 – Compile baseline and explore options to align system	• HR • Consultant • Duplicated effort to bring online

Goal: Operational Innovation

Initiative	Target	Actions	Resources
Shared Library Storage	Redeployment of existing Library SF	Y1 – Collection analysis to determine potential size of storage facility, storage facility requirements and costs and resulting SF for redeployment	• Library Directors • Consultant (estimated $50K)

Goal: Administrative Cost Savings

Initiative	Target	Actions	Resources
Intentional Consortial Sourcing	$25M in shared contracting with 10%+ savings/ cost avoidance	• Y1 Ongoing spending analysis • Contract expiration analysis • Y2 Spending policies	• Existing LVAIC resource • CIO, CFO, Facilities, Purchasing engagement
Leveraged Insurance Buying	Premium increases at or below national trend	Y2 – Compile contract expirations, coverage levels, and costs Y3 – Leveraged buy	• CFOs • New LVAIC resource or consultant

Goal: Expanded Student Opportunities

Initiative	Target	Actions	Resources
PA Basic Needs Network	Accessing available state resources	Y1 Maintain current engagement with PA MASLOW program	LVAIC Existing
Coordinated Course Scheduling	Reduce low enrollment courses on schedules	Y1 – Identify potential courses for consideration Y2 – Coordinate course schedules and teaching loads	• Existing LVAIC • Provosts • Registrars
Strategic Shared Courses	Reduce low enrollment courses on schedules	Y1 – Identify potential courses for consideration Y2 – Provide incentives for shared course development Y3 – Coordinate course scheduling	Provosts
Share Faculty/ Adjuncts	Improve adjunct retention and engagement with FT employment	Y2 – Identify aligned needs. Create shared positions.	Provosts

People Excellence

Goal: Inclusive Higher Education Community

Initiative	Target	Actions	Resources
Affinity Groups	Improve employee recruiting, engagement and retention	Y1 - Expand opportunities for identity communities such as LGBTQ+, new Employees, etc. to network	• CDOs
Collaborative Programming for Inclusive Excellence	Program cost savings through coordinated programming and block booking	Y1 – Share plans to identify opportunities to coordinate schedules and contracting	• CDOs
Community and Belonging Certificate Program for Employees	Multi-module EE engagement program to expand understanding of Community and Belonging	Y2 – Develop program proposal for multi-campus approval. Y3 Implement	• CDOs

Goal: Ongoing Growth & Development for all Employees

Initiative	Target	Actions	Resources
Faculty Development	Cost-effective development opportunities for faculty	Y1 - Maintain ongoing program level with 2-3 programs annually Y3 – Increase program level to 3+ programs annually	• Additional LVAIC time • Speaker fees • Event funding
Mgmt & Leadership Development	Improved mgmt & leadership pipelines through increased program capacity and advances learning opportunities	Y1 – Maintain existing programming capacity with Mgmt Dev Level 1, 2, HELI Y2 – Increase capacity by adding Level 3 Mgmt Dev program, Advanced HELI	• Additional LVAIC time • Event and material costs +$25K annually
LVAIC-wide groups specific Prof Dev programs	Expanded, cost-effective employee opportunities for engagement and growth	Y2 – Inventory existing, LVAIC & campus based professional development needs & programs, prioritize groups for program development & Implementation	• Additional LVAIC time • HR time • Subject Matter Experts fees

Goal: LV Reputation Attracts & Retains Talent

Initiative	Target	Actions	Resources
VITAL Faculty Network	Build Adjunct and NTT engagement and teaching	Maintain current	• Existing LVAIC • Teaching and Learning Ctrs
Recruitment of Dual Career Employees	Align processes to streamline staffing requirements	Y2 – Coordinate openings before candidates are recruited, work with LINC to revisit dual career services	• HR, Provosts

Goal: Employee Engagement & Community Connection

Initiative	Target	Actions	Resources
Lifecycle Programming	Employee engagement and morale	Y1 -Maintain current slate of Health and wellness offerings Y2 – Increase existing programming and add financial wellness	• LVAIC Staff • Vendors
Annual HE issues symposium	Community wide engagement in broad issues impacting higher ed	Y1-Establish annual LVAIC-wide speaker program with networking opportunity	• LVAIC staff • Speaker fees • $20K/yr
Optimize Communities of Practice	Increase pipeline of strategic collaborative initiatives to manage costs or expand student opportunities	Y1 – Facilitate more formal COP structure and create incentive fund to explore collaborative initiatives	• Additional LVAIC time • Start up funds $15K annually
Shared FT positions to meet PT needs	Improve employee recruiting, engagement and retention with full time employment	Y2 – Analyze outsourcing and current PT positions to identify opportunities. Develop sharing structure – either LVAIC hire or campus	• HR • LVAIC or HR Analyst

Impactful Presence

Goal: LV Reputation Attracts and Retains Students

Initiative	Target	Actions	Resources
PA Transfer Pathways Project	Increased community college transfer students	Y1 – Maintain existing participation in Teagle funded PA Transfer Pathways project	• Existing LVAIC time
Multi-campus HS guidance Counselor Tour	Increased exposure and high school student applications	Y1 – Maintain existing 4 campus program for 50 Y2 – Evaluate options to increase capacity with additional programs and participating campuses	• Existing LVAIC and campus time • Y2 – additional LVAIC and campus time • Additional tour +$25K

Goal: Strong Community Relationships

Initiative	Target	Actions	Resources
Shared Pre-College Education and Advising	Increased community understanding of local higher education options and processes	Y2 – Conduct information sessions for parents and students working through existing or new relationship with 3 city school districts and local community organizations	• Additional LVAIC and campus resources to develop and deliver

Estimated Additional Resources

Year	Initiative	Additional Time	Additional Dollars
Year 1	Annual Higher Ed Symposium	+.1 FTE LVAIC staff to develop and coordinate	$20K Event and speaker costs
	Optimize Communities of Practice	+.2 FTE LVAIC staff to coordinate	$15K annually Pilot funds
Year 2	Increased Mgmt & Leadership Development	+.5 FTE LVAIC staff to develop and coordinate	$25K annually Materials and food
	Group Specific Professional Development	+.2 FTE LVAIC staff to develop and coordinate	TBD Subject Matter Expert fees
	Grow Lehigh Valley Counselor Tour	+.2 FTE LVAIC staff to develop and coordinate Campus staff to implement	$25K Program and Event Costs/ additional program
	Pre-college Education and Advising	+.5 FTE LVAIC or Campus staff to develop and deliver	
Year 3	Shared HRIS	+.25 FTE Development Redeployed Implementation staff	$40K Consultant
	Shared Library Storage	+ __Library staff to work with consultant	$50K Study Consultant
	Increased Faculty Development	+.2 FTE LVAIC staff to develop and coordinate	$10k Additional speakers, events, and materials annually

ENVIRONMENTAL SCAN

March 2023

LVAIC today

LVAIC Overview

- Members
  - Cedar Crest College
  - DeSales University
  - Lafayette College
  - Lehigh University
  - Moravian University
  - Muhlenberg College
- Target Audiences
  1. Faculty and staff
  2. Students

- Key Collaborations
  - Resource sharing
  - Sourcing
  - Organizational, professional, and faculty development
  - Health plan
  - Cross registration
- Structure
  - 501(c)(3) Founded in 1969
  - Consortial Staff
    - 4 Full time
    - 3 Part time

2020 – 2024 Strategy Map

Adopted December 2020

Mission: The Lehigh Valley Association of Independent Colleges is a community of independent colleges and universities growing stronger through collaboration.

Vision: A pioneering collective of distinctive colleges and universities serving the larger community through impactful collaboration, life-long learning and academic excellence.

Strategic Priorities

Enabling Technology

- Classrooms
- Cyber Security
- Infrastructure
- Support
- Licensing
- Technology enabled processes

Shared Resources

- Health Insurance
- Risk Management
- Sourcing
- Administrative processes
- Cross registration
- Libraries
- Contracted services
- Contingent Faculty

Organizational Enrichment

- Teaching and Learning
- Professional development
- Organizational development
- Process redesign

Equity and Inclusion

- Inclusive LVAIC Community
- Connection to local inclusion efforts
- Pipeline relationships for enrollment and employment
- Inclusive curriculum
- Supportive structural resources

Culture of Collaboration and Community Commitment

Guiding Principles

Vision Statement - A pioneering collective of distinctive colleges and universities serving a larger community through impactful collaboration, life-long learning, and academic excellence.

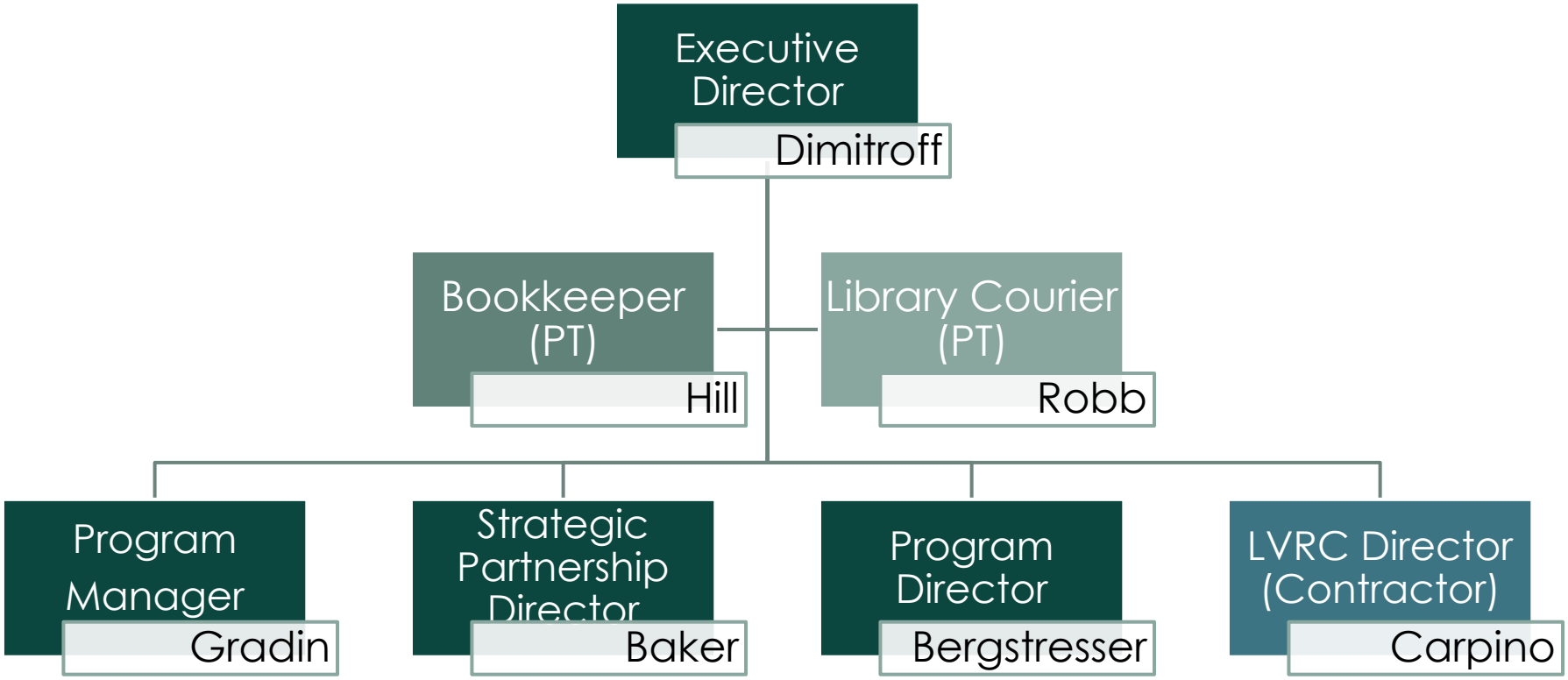
- LVAIC is the collective of the member campus communities and is committed to advancing the success of our students and the communities in which we live and work.
- LVAIC collaboration is led by the presidents of our member campuses, who are committed to finding collective answers and opportunities and who are all actively involved in consortial decision making.
- LVAIC leaders are committed to pushing the boundaries of collaboration and it is incorporated into their respective campus cultures.
- LVAIC collaboration will focus on undertaking audacious initiatives that provide the greatest impact and resources will be prioritized based on number of campuses impacted.
- LVAIC members are committed to collectively maximize the distinctiveness of each campus.
- LVAIC members commit to candidly and respectfully raise and discuss areas of disagreement or competition.
- LVAIC members acknowledge that while they compete in different ways, they are committed to undertake opportunities that, even if not advancing their individual success, will advance the collective success.
- LVAIC nurtures and advances collaboration across all the members of its community through both peer groups and cross-functional groups.
- LVAIC collaborative decisions will be data based, including return on investment or cost benefit analysis, and the data needed to make those decisions will be readily shared.
- LVAIC collaborative initiatives will be intentional and aligned to consortial priorities as established in strategic plans.

Adopted December 2020

2022-23 Business Model

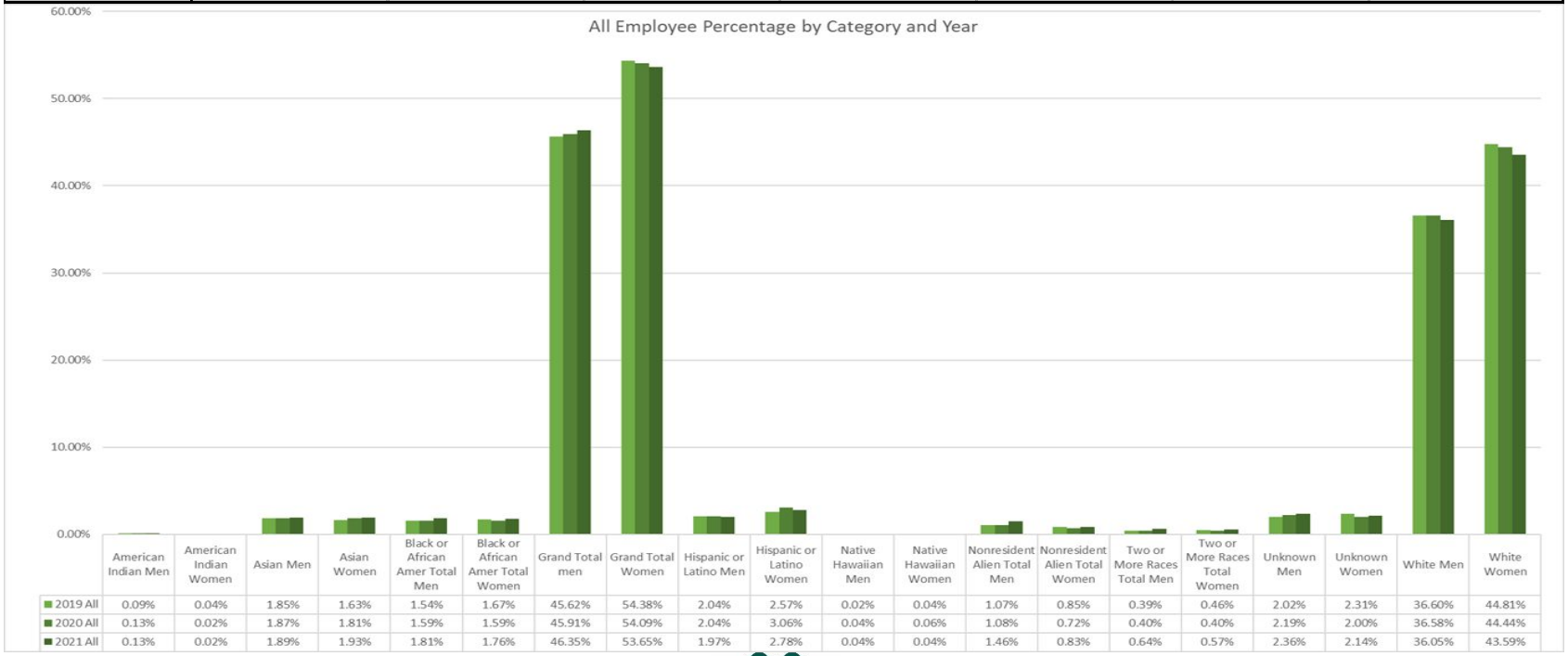
Scope	Includes	Could Explore	Does NOT include
Geographic service area	• Lehigh Valley, Eastern Pa	• NJ, all of PA	• Extra-regional areas
Customers served	• Private, nonprofit higher education institutions and their communities • Community colleges only to the degree they benefit the primary members	• Broader engagement of community colleges • High schools/school districts • Local nonprofits • Community groups	• For profit HE institutions • Public HE institutions • Institutions outside the greater Lehigh Valley
Programs/ services offered	• Shared resources and programs • Self-funded health plan • Organizational and professional development • Collaborative sourcing • Cost saving activities for 2 or more institutions • Collaborative research • Shared subject matter expertise, facilitation, and consulting • Cross registration	• Shared employees/faculty • Shared administrative operations • Shared academic classes, programs, majors, & minors • Shared major systems such as LMS or HRIS • Federated ID • Messaging and thought leadership	• Offer degrees • Enroll students • Campus fundraising • Campus or program specific advertising
Funding sources	• Dues • Member Reimbursements • Vendor rebates • Research contracts • Grants • Program specific sponsorships	• New grant channels • Cash sales of programs and services to new audiences • New members • External sponsorships	• Grants that would be competitive to our members • Political endorsements

LVAIC Staff


Executive Director
Dimitroff
Bookkeeper (PT)
Hill
Library Courier (PT)
Robb
Program Manager
Gradin
Strategic Partnership Director
Baker
Program Director
Bergstresser
LVRC Director (Contractor)
Carpino

LVAIC Community 2022

Group	Cedar Crest	DeSales	Lafayette	Lehigh	Moravian	Muhlenberg	Total
Faculty FT	75	134	255	555	159	186	1,364
Faculty PT	126	237	51	107	159	152	832
Staff FT	138	283	544	1,193	259	372	2,789
Staff PT	30	54	59	17	70	77	307
Student FTE	1,216	2,645	2,715	6,477	2,267	2,262	17,582
							22,874



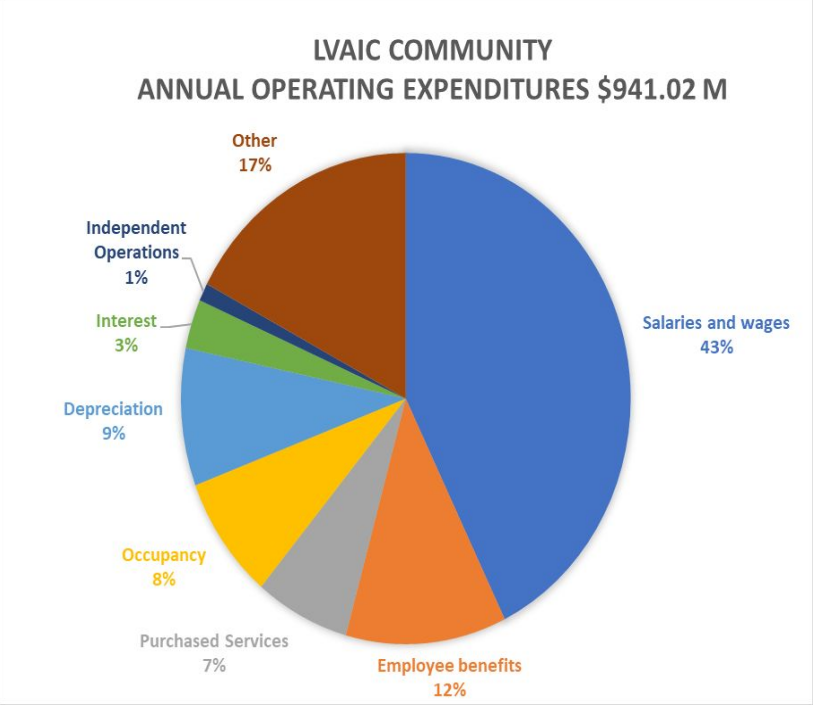
	American Indian Men	American Indian Women	Asian Men	Asian Women	Black or African Amer Total Men	Black or African Amer Total Women	Grand Total men	Grand Total Women	Hispanic or Latino Men	Hispanic or Latino Women	Native Hawaiian Men	Native Hawaiian Women	Nonresident Alien Total Men	Nonresident Alien Total Women	Two or More Races Total Men	Two or More Races Total Women	Unknown Men	Unknown Women	White Men	White Women
2019 All	0.09%	0.04%	1.85%	1.63%	1.54%	1.67%	45.62%	54.38%	2.04%	2.57%	0.02%	0.04%	1.07%	0.85%	0.39%	0.46%	2.02%	2.31%	36.60%	44.81%
2020 All	0.13%	0.02%	1.87%	1.81%	1.59%	1.59%	45.91%	54.09%	2.04%	3.06%	0.04%	0.06%	1.08%	0.72%	0.40%	0.40%	2.19%	2.00%	36.58%	44.44%
2021 All	0.13%	0.02%	1.89%	1.93%	1.81%	1.76%	46.35%	53.65%	1.97%	2.78%	0.04%	0.04%	1.46%	0.83%	0.64%	0.57%	2.36%	2.14%	36.05%	43.59%

Student data source - 2022 Fall Census
Faculty/staff data source – IPEDS

March 2023

Financial Resources and Impact
LVAIC Community

Annual Operating Expenditures



Source - FY22 Audited Financial Statements

Regional Economic Impact of Higher Education

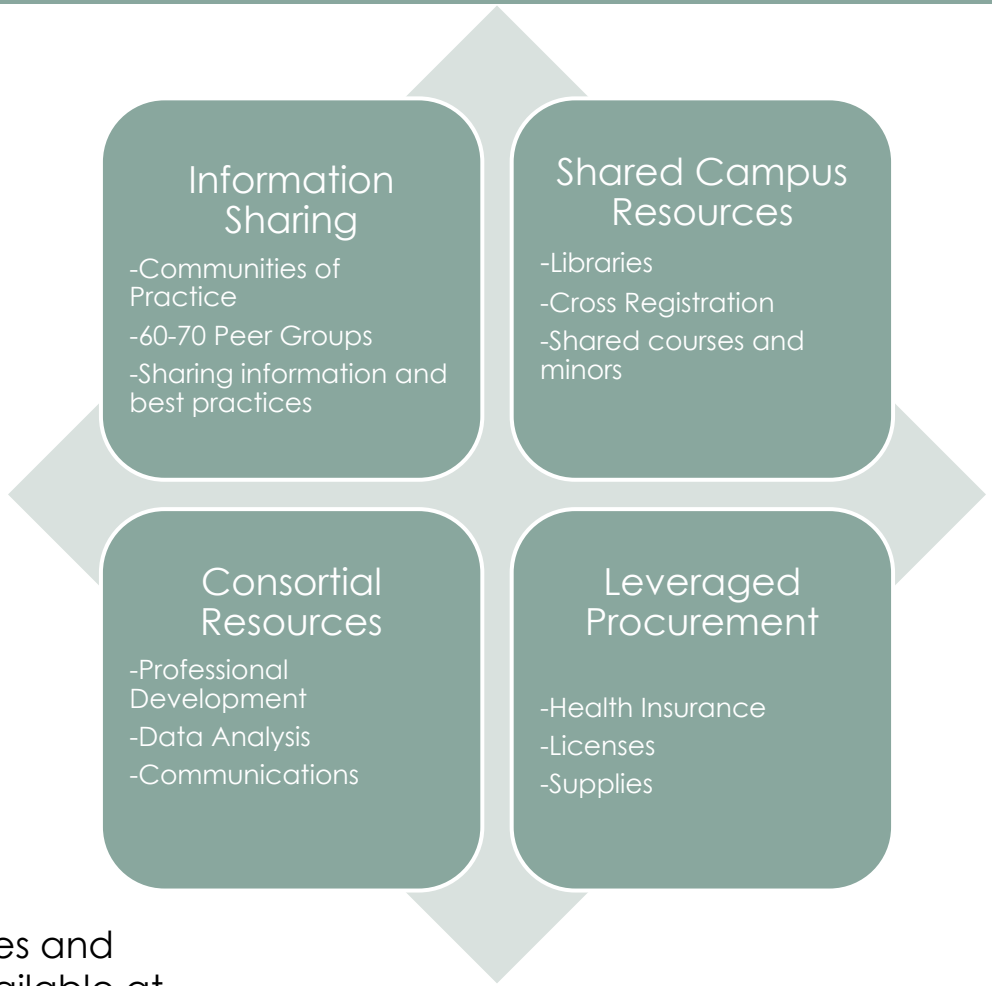
Allentown/ Bethlehem/ Easton

- 25 Institutions
- 8,500 direct jobs
- $453.4M income
- $175.5M operational spending
- $101M capital spending
- Source – Anchor Economy Initiative, Philadelphia Federal Reserve

Lehigh Valley (including Reading)

- 8 Institutions
- 16,119 direct and indirect jobs
- $95,505,006 in state and local tax revenue
- Source – AICUP 2022 Economic Impact Report

LVAIC Collaboration Today



Additional examples and information are available at www.lvaic.org

LVAIC Collaborations – Yesterday and Today

Essential Elements of LVAIC Collaboration

Essential Elements	Connecting	Cooperating	Coordinating	Collaborating
Vision & Relationships	Basis for networking is between individuals Priorities are primarily individual and/or social Interaction is limited to specific events	Basis for cooperation is usually between individuals but may be mandated by institutions Institutional mission and goals unlikely to be considered, but departmental priorities may be Interaction is on an as needed basis/no time limit	Individual relationships are supported by their institutions Both institutional mission and goals and departmanal priorities are reviewed for compatibility Interaction ususally around one specific project or task	Commitment of the institutions is fully behind each individual Common, new goals and objectives are created that directly contribute to larger institutional goals One of more projects are undertaken for longer-term outcomes
Structure, Responsibilities & Communication	Relationships may not yet be clearly established No shared planning is required No formal information exchange mechanisms established	Relationships are established but informal, each institution functions separately Minimal shared planning is required Information is conveyed or exchanged as needed	Institutions assume needed roles but still function separately Some project-specific planning is required Communication roles are established and a channel for interaction have been developed	New structure and/or formal division of labor is created Comprehensive planning is required, including outcomes/measures of success Many levels of communication and channels for interaction have been developed
Authority & Accountability	Leadership is unilateral and control is central	Authority rests solely with individual institutions Leadership is unilateral and control is central All authority and accountability rests with each institution	Authority rests on each institution but there is coordination of decision making Some sharing of leadership and control exists Some shared risk is assumed, but most authority and accountability rests with institutions	Authority is determined by the collectively by the group to balance ownership Leadership is dispersed and control is shared and mutual Equal risk is assumed and shared by each institution
Resources & Rewards	Resources are separate Miminal reward, likely individual	Resources are separate, but may be shared on occasion Miminal reward, may be mutual	Resources are identified more clearly and can be made available for a specific purpose or project Rewards are mutually acknowledged	Resources are pooled or jointly secured for long-term priorities/efforts Insitutions share in the products and recognize that more is accomplished together than individually
Trust	very low	low	moderate	high

Adapted from Collaboration: What Makes It Work (Mattessich et al., 2001, p.61) and from works of M. Blank, S. Kagan, A. Melaville, and K. Ray.

Essential Elements of LVAIC Collaboration

Shared vision of success

- If you don't know where you are going, any road can take you there…

Consortial priorities are aligned to member goals

- Collaboration is a way to achieve member priorities, not additional work.

Environment of trust to support risk taking and change

- Collaboration is fundamentally a change initiative – doing something together means doing something new or differently.

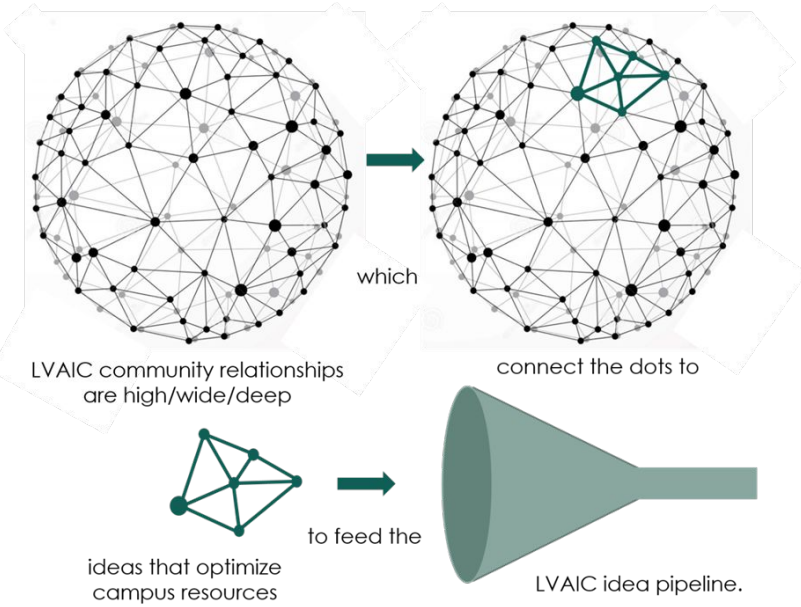
Relationships that create a foundation of trust

- Collaboration moves at the speed of trust.

Commitment of resources needed to identify and implement collaborative initiatives

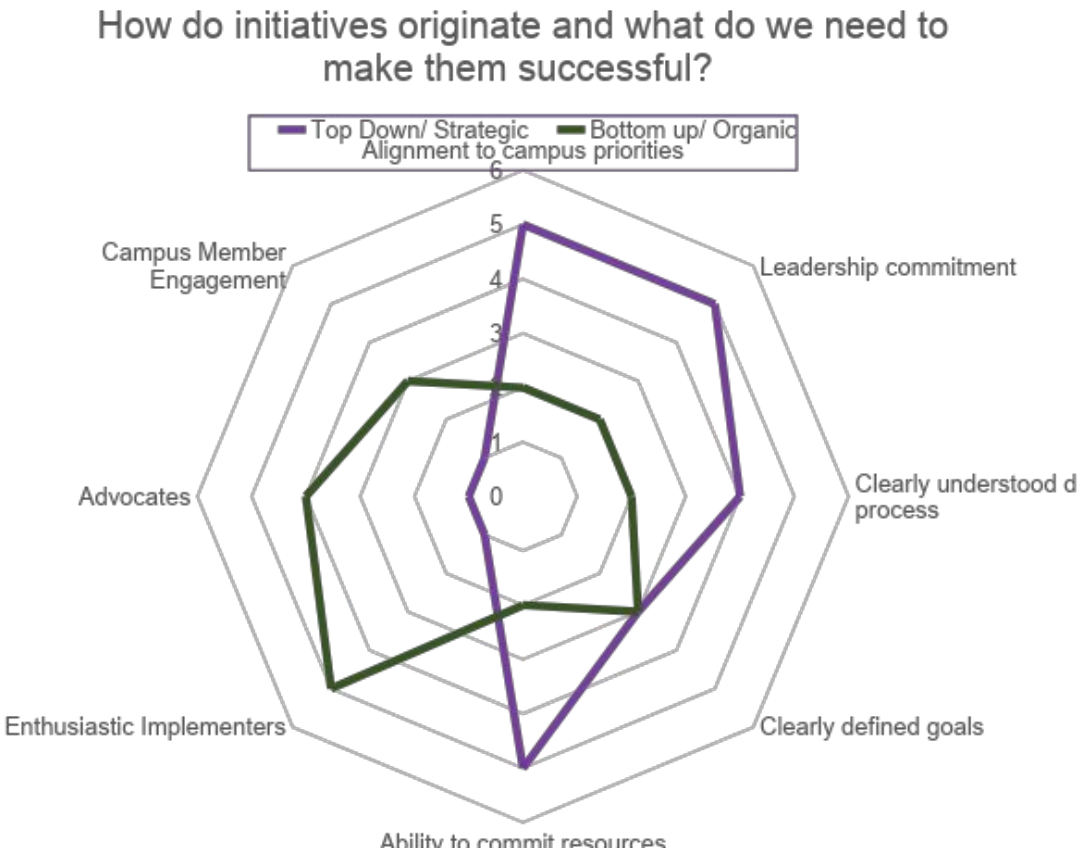
- This includes time, talent, and treasure.

Whole Systems Thinking



Essential Elements of LVAIC Collaboration

Successful collaborations incorporate all these characteristics. This chart is used as a planning tool to understand the starting point of a project and identify the gaps that must be addressed with the project plan.



- Alignment to campus priorities
- Leadership commitment
- Clearly understood decision process
- Clearly defined goals
- Ability to commit resources
- Enthusiastic implementers
- Campus member engagement
- Advocates

Campus Strategic Plans

Strategic Plan Summaries

Cedar Crest College

Open the Door to What's Next 2023-2026

- **Deliver Distinctive Academic Experiences**
  - The Learning Commons: Center for Teaching and Learning
  - Accelerating Student Success: 3+1 Bachelor's/Master's Degree
  - Programs Advancing New Health Science Programs
- **Unlock Student Potential**
  - Laptops for all students
  - Fully Fund the Carmen Twillie Ambar Sophomore Expedition
  - Enhance Athletic Programs
  - Expanded Access to Paid Internships
  - Textbooks Included with Tuition
- **Support Community Well-being**
  - Employee Wellness Program
  - Student Wellness Program
  - Campus Renovations
  - Improvements in Student Accessibility
- **Build Change for Our Common Good**
  - School of Nursing Health-care Clinic
  - Increase Cedar Crest Fund
  - Increase Endowment
  - Center for Community Engagement through the Arts and Humanities

Cedar Crest College is a caring and inclusive community in which individuals flourish through exploration and learning.

We nurture the heart, mind and soul by fostering a life of curiosity, critical thinking and creativity.

DeSales University

Connect to Our Future 2022-2025

Strategic Pillars

1. Academic Excellence and Innovation – propelled by the solid and successful outcomes of its educational programs, DeSales commits to growing its reputation for academic excellence through innovative methods and organizational structures.
2. Student Experience – DeSales provides intentional experimental opportunities designed to inspire and nurture the full development of undergraduate and graduate students.
3. Visibility and Growth – As the nation's only Salesian, Catholic university, DeSales will leverage the new brand platform to advance our distinctive value and positively position DeSales as the top choice destination to work and learn.
4. Stewardship – DeSales remains on solid financial footing and seeks to advance its mission by identifying and embracing new opportunities while continuing to navigate market uncertainty and challenges.

DeSales is a Catholic , Salesian university that inspires transformative learning through the liberal arts and professional studies by energizing students to be who they are and be that well.

Lafayette College

Strategic planning in process

Affordability and Distinction through Growth 2016 – 2026

- Increasing affordability
  - Provide greater access to a Lafayette education for talented students regardless of family finances.
  - Increase the student body by about 50 students per year over eight years, providing additional revenue that can be devoted to financial aid.
- Enhancing Distinction
  - Recruit 40 new faculty over an eight-year period.
  - Recruit scholars who deepen existing disciplines as well as those who work in emerging fields or areas that transcend traditional academic boundaries and enhance faculty diversity.
- Managing Growth
  - Create housing for 400 additional students, with facilities that will include ground-level retail options available to residents of the broader community.
  - Construct a $75 million signature academic building—the Integrated Sciences Center—and renovate existing classrooms and other academic facilities.
  - Raise the financial aid goal through within the ongoing Live Connected, Lead Change campaign, including the issuing of a President's Challenge for Financial Aid that extends beyond the current campaign.

In an environment that fosters the free exchange of ideas, Lafayette College seeks to nurture the inquiring mind and to integrate intellectual, social, and personal growth. The College strives to develop students' skills of critical thinking, verbal communication, and quantitative reasoning and their capacity for creative endeavor; it encourages students to examine the traditions of their own culture and those of others, to develop systems of values that include an understanding of personal, social, and professional responsibility, and to regard education as an indispensable, life-long process.

Lehigh University

Strategic planning in process

Strategic Planning in Process

Themes

1. Education With Purpose
2. Lehigh User Experience
3. Research for Impact
4. Smart Growth

Through-lines

1. Diversity and Inclusion
2. Environmental and Fiscal Stability
3. Operational Excellence
4. Place
5. Global

To advance learning through the integration of teaching, research, and service to others.

Moravian University

2021-2024

Aligning for Growth

- Next Generation Academic Programming
- Investments in Enrollment
- Compelling Marketing and Storytelling

United in Learning

- Universal Skills & Career Success
- Next Level Advising
- Connecting the Curriculum

Together Towards Equity

- Equity as a Core Value
- Increasing Access
- Enhancing Transparency & Accountability

Building a New Legacy

- Designing for the Future
- Investing in People
- Leveraging Technology & Integrating Data
- Adaptive and Vibrant Spaces

Mission

Moravian University's liberal arts education prepares each individual for a reflective life, fulfilling careers. And transformative leadership in a world of change

Vision

A Moravian education is one of action and doing. It is hands on, where students learn through experiential means in order to be producers of new knowledge. Moravian students work together practicing leadership, teamwork, community support, and reflection in order to significantly contribute to a more equitable and just future society.

Website: moravian.edu/about/strategic-plan

January 2023

Muhlenberg College

Strategic Plan 2017-2022

- Strengthen our Value and Distinctiveness
  - Deepen Engaged Liberal Arts Learning and Scholarship
  - Prioritize Diversity, Equity, and Inclusion
  - Support a Vibrant Residential Life
  - Enable Students to Achieve Powerful outcomes
  - Engage the Muhlenberg Network
- Fortify our Operating Model
  - Strengthen Enrollment Management
  - Optimize Physical Resources
  - Broaden and Deepen Alumni Engagement and Support
  - Expand the Division of Graduate and Continuing Education to Generate Additional Revenue
  - Develop New Revenue Sources

Muhlenberg College aims to develop independent critical thinkers who are intellectually agile, characterized by a zest for reasoned and civil debate, committed to understanding the diversity of the human experience, able to express ideas with clarity and grace, committed to life-long learning, equipped with ethical and civic values and prepared for lives of leadership and service. The College is committed to providing an intellectually rigorous education within the context of an inclusive and diverse campus; we strongly believe that diversity is essential to learning and to our success as a pluralistic community. Our curriculum integrates the traditional liberal arts with selected pre-professional studies. Our faculty are passionate about teaching, value close relationships with students, and are committed to the pedagogical and intellectual importance of research. All members of our community are committed to educating the whole person through experiences within and beyond the classroom. Honoring its historical heritage from the Lutheran Church and its continuing connection with the Evangelical Lutheran Church in America, Muhlenberg encourages, welcomes and celebrates a variety of faith traditions and spiritual perspectives.

External Environment

Who and what competes with LVAIC?

While it was difficult to identify many head-to-head competitors, there are many organizations providing at least some portion of the benefits provided by LVAIC.

	Solo action	Other HE Consortia & Leagues	HE Associations	Local & Business Organizations	Group Purchasing Orgs.	Outsourcing	Consultants
Examples	Member campuses	• LVECH • NACU • Patriot League	• AICUP • CIC • NACUBO • AAC&U	• LVEDC • LINC • LVBCH • GLVCC	• E&I • PAISBOA • EAST	• Study abroad providers • Bookstore operators	• EY • McKinsey • Baker Tilly
Advantages	• Direct mission alignment • Internal expertise and perspective	• Institutional peers	• Functional peers	• Local focus • Cross industry • Community relationships	• Volume	• Brand awareness • Credentials • Quality programs	• Credibility • Specific expertise
Challenges	• Competition • Lack of volume and leverage • Only internal expertise and perspective	• Primary mission not op efficiency • Member competition • Building relationships	• Specific areas of focus	• Service models not aligned to HE	• Broad not specific solutions • Lack of control	• Expensive • Limited area of focus • Mission misalignment • Lack of control	• Expensive • Short term • Lack of long-term accountability
Competitor Type	**Substitute**	**Existing and New Competitors**	**Existing and New Competitors**	**Substitute**	**Existing and New Competitors**	**Substitute**	**Substitute**

What is LVAIC's market position?

	Today	Changing
Existing LVAIC Competitors	• Price gap with public institutions shifting • Small institutions looking to partner/collaborate for operating cost savings • Program offerings increasing faster than student enrollments • Many institutions "doubling down" on historic enrollment practices, markets, and business models	• Potential system-wide restructuring of PA public institutions to drive operating cost efficiencies • Admissions practices becoming more aggressive • Small institutions increasingly looking for partnerships and mergers
New LVAIC Competitors	• Many new grant-funded consortia in last five years looking for academic sharing opportunities • Growth of online providers	• New alliances and partnerships emerging with new business models focused on cost effectiveness
Substitutes for LVAIC collaboration	• Professional associations – crowded market with overlapping offerings • Rapid growth in higher education consultant offerings	• Rapidly increasing outsourcing opportunities for administrative services and functions
Influence of inputs	• Software and app licensing leverage opportunities • Integrated solutions vs one-time buys • Increasing reliance on the internet of things	• Rapidly changing educational and administrative technologies demanding nimble actions and new skills • Cyber security demands increasing
Influence of Members	• Individual institutional buying power decreasing in consolidating markets, such as health care and licensing • Increasing student/parent expectations require member redeployment of existing resources • Rapidly shifting job market demands new skills and programs requiring redeployment of existing resources	• Changing public perception of rising cost of higher education increasing urgency for operating efficiencies • Increasing demand to adapt and automate processes to both meet student/parent expectations and find efficiencies and leverage

Other Models of Higher Education Collaboration

- Shared Administrative Services
  - Claremont College Services – more than 30 shared services such as facilities, security, library, IT staff and infrastructure
  - The Boston Consortium – cost savings focused activities such as shared risk management and employee health insurance
- Shared Single Services
  - Boston Library Consortium – shared library licensing
  - E&I Cooperative Services – joint purchasing
- Student Services
  - Colleges of the Fenway – shared student programming, international and travel away student administration, cross registration
- Community/Campus Relationships
  - Pittsburgh Council of Higher Education - community inclusion and access, law enforcement relationships, regional workforce development
- Collaborative Research
  - Big Ten Academic Alliance – large-scale, multi-institutional research projects, library resources, and leadership development programs
- Professional Development
  - Associated Colleges of the Midwest – Institute on College Futures, Visiting Faculty and Faculty travel funding
  - Liberal Arts Collaborative for Digital Innovation – faculty development in curricular innovation
- Academic Programs
  - Five Colleges – Shared faculty appointments, more than 10 collaborative majors and minors, and approximately 3,000 student cross-registrations per year (down from more than 5,500 five years ago)

2020 LVAIC Strategic Plan

2023 progress and status

2020 Strategic Plan Progress

Mission: The Lehigh Valley Association of Independent Colleges is a community of independent colleges and universities growing stronger through collaboration.

Vision: A pioneering collective of distinctive colleges and universities serving the larger community through impactful collaboration, life-long learning and academic excellence.

Strategic Priorities

Enabling Technology

- Classrooms
- Cyber Security
- Infrastructure
- Support
- Licensing
- Technology enabled processes

Shared Resources

- Health Insurance
- Risk Management
- Sourcing
- Administrative processes
- Cross registration
- Libraries
- Contracted services
- Contingent Faculty

Organizational Enrichment

- Teaching and Learning
- Professional development
- Organizational development
- Process redesign

Equity and Inclusion

- Inclusive LVAIC Community
- Connection to local inclusion efforts
- Pipeline relationships for enrollment and employment
- Inclusive curriculum
- Supportive structural resources

Culture of Collaboration and Community Commitment

2020 Strategic Plan Status Summary

What did we accomplish?

- Intentional organizational development
- Shared licensing
- Shared adjunct pilot
- New HIC model and significant savings
- Regional relationships

What didn't we accomplish?

- Shared back-office operations
- Significant shared licensing
- The next shared minor
- Pipeline community relationships
- Intentional academic program sharing and cross registration

What things got in the way?

- Lack of commitment to guiding principles
- Continued to act opportunistically rather than intentionally (licensing, shared adjunct)
- Covid – bunker mentality
- Many transitions – leadership and staff
- Lack of specific goals
- Limited capacity to evaluate new approaches and options

Enabling Technology

	Achievements/ progress	Little or no progress	Challenges
Classroom Technology		• Common platform	• Supply chain issues delayed deliveries and installations • During the pandemic each campus went alone in different directions
Cyber Security	• Active intercampus information sharing • Explored a consortial consulting contract • Shared community education		• Rapidly evolving and limited expertise
Infrastructure Support		• Shared helpdesks	• Remains an area of significant opportunity
Licensing/ Technology enabled processes	• Some success with Amazon, DocuSign • Working to create a road map of major opportunities • New 5 yr. FMIS multi-campus contract	• Major system ($$) joint licensing • Common LMS	• Major campus systems investments made without considering collaborative options (IE HRIS, LMS) • System and processes are interconnected

Shared Resources

	Achievements/ progress	Little or no progress	Challenges
Health Insurance	• Significant new campus level savings FY22 from new contract relationships and stop loss structure		
Risk Management		• Exploration of joint liability coverage	• Existing relationships • Staff capacity
Sourcing	• Spending analysis driving leveraged sourcing opportunities • Consortial contracts with Amazon and E&I for savings and data reporting • Consortial contracts $8m annual spending (not including Health)	• Corralling "cash"	• Procurement not centralized • No consequences for poor procurement choices (travel, "cash")
Cross Registration and Academic programs	• Joint LANTA contract to enable transportation– LEH, LAF, CCC, MUH • Process redesign underway for F/S cross registration • Evaluation of low enrollment class opportunities for shared scheduling and adjuncts	• Intentional course scheduling to drive cross registration • Next shared minor	• Imperatives not well understood (low enrollment classes) • Success outside faculty incentive and reward structure
Administrative Processes		• Shared backroom operations	• Urgency • Integrated with systems • Lack of capacity to evaluate options
Libraries	• Updated courier program and analysis of delivery options		
Contracted Services			
Contingent Faculty	• Shared Adjunct pilot	• Permanent shared adjunct	

Organizational Enrichment

	Achievements/ Progress	Little or no progress	Challenges
Teaching and Learning	• Collaborative programming for curricular development • Annual group book reads • Topic specific workshops		
Professional Development	• Low cost, easily accessible offerings • Management Development Certificate Program including Crucial Conversations and Emotional Intelligence • Redesigned Higher Education Leadership Institute • Cyber Security Awareness Month annual programming • Health and Wellness Series • Department Chair programs	• Administrative staff skill building	• LVAIC staff capacity
Organizational Development	• Departmental and campus specific team building and coaching • Affinity group networking connections and events • Project specific coaching		
Process Redesign	• F/S cross registration as a benefit	• Teaching process redesign skills	• Limited awareness of need • Limited capacity for change

Equity and Inclusion

	Achievements/ progress	Little or no progress	Challenges
Inclusive LVAIC Community	• DEI book reads – safe spaces for learning • F/S of Color Coffee Hours	• Coordinated programming (i.e. Black History Month)	• Actions but not momentum • We struggle because the campuses struggle. • So much turnover.
Connection to local inclusion efforts	• LINC DEI Advisory Committee		
Pipeline relationships for enrollment and employment		• School district relationships • Local employment connections	• DEI leaders and programs tend to be more focused on students than F/S
Inclusive curriculum	• Well attended Inclusive curriculum faculty workshops and book reads		• One off programs rather than ongoing conversations
Supportive structural resources	• Preliminary DEI purchasing reporting	• LVAIC wide DEI Steering Committee	• Organizational structures continue to evolve. • LVAIC DEI leaders want to meet and work together but can rarely meet due to heavy schedules

PLANNING RESOURCES

From your perspective how would you answer the following question: What is LVAIC?
LVAIC serves as the conduit and impetus for collaborative activities that include, but are not limited to: thinking (affinity group meetings) operating functions (purchasing, shared positions) access (to education at other institutions for students, faculty or staff and programming for faculty and staff)
LVAIC is a regional consortium of independent colleges and universities that is dedicated to supporting the missions of its member institutions through the development and delivery of programs, processes, and at times core functions that are more efficiently done or more impactful when conducted in a collaborative manner.
From my perspective, LVAIC represents a collaborative relationship between private colleges' and universities' administration in the Lehigh Valley to discuss, share and help to promote an educational resource for its students and employees.
A consortium of like schools sharing resources and information for mutual benefit. The LVAIC team/structure strive to provide and facilitate effective ways for the schools to leverage differences and commonalities thus helping all of us progress toward our goals, both shared and unique.
A consortium of the Lehigh Valley 4 year colleges that promotes and provides avenues for active collaboration in order to make each individual college stronger.
A regional consortium that helps to align its partners to help answer the pressing questions facing higher education. The consortium provides the ability to have groups of people with like roles to meet (Presidents, CIO, etc) and collaborate. Additionally, LVAIC helps with joint purchasing and sharing of resources.
LVAIC is a consortium of partners who through their work together engage in dialogue, share information pertinent to the industry, collectively participate in cost sharing efforts and put forth best practices to better serve students.

How can collaboration best advance the strategic priorities of your campus?

1. Create efficiencies that provide for reallocating resources to strategic priorities... spend less on the things we are already doing to allow us to do new things.
2. Find overlap in our strategic plans, looking for ways to collaborate on things we may not be able to afford on our own.
3. Provide centralized professional development opportunities for our employees. We NEED to continue with workforce development, and this line item is always vulnerable in our budgets.
4. Continuing to learn from each other through our affinity groups... including the affinity groups of others (Provosts, CIOs, etc.)

This is a very difficult question to address. I do not want to give a canned answer on collaboration and it's benefits. I am not sure if campus leadership, at all levels, embraces the goals of LVAIC collaboration. Until we truly understand benefits of collaboration, it is impossible to see the how it can advance each campus strategic priorities.

If students had easy access to opportunities facilitated by each college, such as courses, athletics, internships, study abroad, clubs, parties, etc. it would widen the scope of what we can all provide individually. To start we should work together to make the changes and develop the processes and systems needed to make cross-registration user-friendly and to communicate it to each of our campuses.

One of the objectives of our most recent SP is to create a Center for Community Engagement through the Arts and Humanities. This will provide an opportunity for Cedar Crest College to become a center for our community to highlight the expertise and academic accomplishments of our employees and students. Through collaboration CCC can help to expand it's footprint within the LVAIC community, and vice versa.

We are in the early stages of building our next strategic plan. While it is a wide-open conversation at this stage, it is quite likely that operational efficiencies that LVAIC can support, including in terms of back office activity and even in terms of student-facing activity, will help advance our strategic priorities.

Cost sharing (both monetary and personnel).
More thought partners typically leads to a better final outcome.

Collaboration best advances the strategic priorities of DeSales by helping to create efficiencies and reduce costs. An example would be finding opportunities for shared services to reduce the costs by sharing implementation and operational costs and also having opportunities to create a center of knowledge on a product or service that makes implementation more efficient. A specific example would be look at what courses are being taught at all campus and identify the courses that could be reduced to just one or two campuses and leverage cross registration for the students.

Shared resources and increased cost sharing will go a long way toward ensuring that all of our institutions can provide the necessary initiatives to be successful. In addition, from a reputational standpoint, when we think about working to recruit excellent faculty and staff, the more we can work together, the more attractive it will make this entire area to top talent.

It's the key to all things in terms of moving higher education forward. We can be more efficient and effective in allocating resources, both financial and intellectual capital. For students that come to one LVAIC campus but would benefit from programs or services that another campus offers. In terms of teaching and learning, we could leverage professors for classes that need multiple campuses to enroll a specific course (stats, R programing, etc).

March 29 Working Session Vision

- Group developed Snow Globes
- https://docs.google.com/presentation/d/1-blxShkSHGIHZfKffULk-JMgjE4rRbIlkUKnrD2UXJo/edit?usp=sharing

Provide one word that summarizes your take-away from the Working Session on March 29.

- Action
- Benefit
- Collabatition
- collaboration
- Collaborative
- Completoaloration
- connections
- Connections
- coopertation!
- Coopetition
- Coopetition!
- Engaged
- Good starting point
- Hope
- Hopeful
- Hopeful
- Hopeful
- Ideas
- Inspired
- Intentional
- Interested
- Opportunity
- Optimism
- Optimistic
- optimistic
- Optimistic
- Possibilities
- possibilities
- Productive
- Reconnected
- Support
- There are many new(er) employees and we should not take for granted that they know what LVAIC is or does. I think this is important to note.
- trust
- uncertain but hopeful
- Unrealized-potential

March 29 Working Session Ideation Session

- 250+ ideas shared
- Affinity Diagram
- https://docs.google.com/spreadsheets/d/1bI_kZjOtW931PkGcNeUsj1NcsgG3lzLJz-XWfnGQ2O4/edit?usp=sharing

March 29 Working Session
How to/ Culture of Collaboration

- A centralized group to implement
- A centralized group to operationalize and implement
- Affinity groups for all levels of the organization
- Attention to processes needed to make what we already decided reality
- Better communication across (Slack, etc)
- Build collaboration into institutional and individual goals
- Calendaring & communication (programming)
- Charge LVAIC collaborative groups with refining top ideas (e.g. HR=professional development)
- Collaboration that is based on true buy-in
- Collaborative leadership that leads to power in the valley
- Create a "report back" expectation to this group? Presidents & Provosts?
- Create highly efficient remote teams
- Create/fund LVAIC position to project manage priorities
- Cross-functional leadership group
- Empowering communities of practice towards collective action
- Evergreen planning
- Expand LVAIC communities of practice to include more
- Functional LVAIC groups w/a directed shared purpose i.e. VPSA get together or OIT. We share what working on but what if we had collab. tasks to do together
- Help each institution with a systematic approach to change mgmt with our faculty
- Honest set of standards and scale
- Incentivize collaborative projects that fulfill LVAIC vision & goals
- Include set of tickets/seats at performances at each institution
- Inter-institutional events
- Joint meetings with employers to learn needs
- LVAIC 5K or 1/2 marathon
- LVAIC Iron Pigs game
- LVAIC service events
- LVAIC swag
- Make LVAIC focused work part of people's jobs
- Map/identify areas of collaboration vs competition
- More collaboration & conversation between leadership groups
- networking/community building events
- Overlay of support structures
- Prioritizing collaboration over competition
- Proactive prompting to continue position based meetings
- Promote special events across all campuses with easy RSVP/sign-up
- Shared communities of practice for faculty
- Shared community outreach event
- Shared resource/ infrastructure between campus resource parties (or maybe partners)
- Slack channel for all LVAIC
- Social events at different campuses every semester (had yes written on it)
- Social for all LVAIC after graduation
- Visible collaborations