



## Strategic Thinking in Uncertain Times **Partnership, Programs, & People**

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# Meet the Presenter



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# Learning Outcomes

1. Distinguish between institutional planning and strategic planning.
2. Identify sources of external data to inform the planning process.
3. Describe visioning, prioritization, and implementation.



# Higher Ed Strategic Planning

## The Typical Process

Internal  
data/peer data

Stakeholder  
engagement

Refine & set  
goals

### *Subtext*

- *What do we do well?*
- *What can we do better?*
- *What is everyone else doing that we're not doing?*

- *What problems do we agree on?*
- *What do people think is important?*
- *What do people want to do?*

- *Which problems are solvable?*
- *Which solutions are compelling?*
- *Which KPIs will indicate that we have improved?*

# Higher Education Strategic Plans

## Common Themes

Student  
Experience/Success

Research

Financial Sustainability

Data/Infrastructure

*A lot of overlap  
between  
institutions ...  
why?*

# Higher Ed “Strategic” Planning

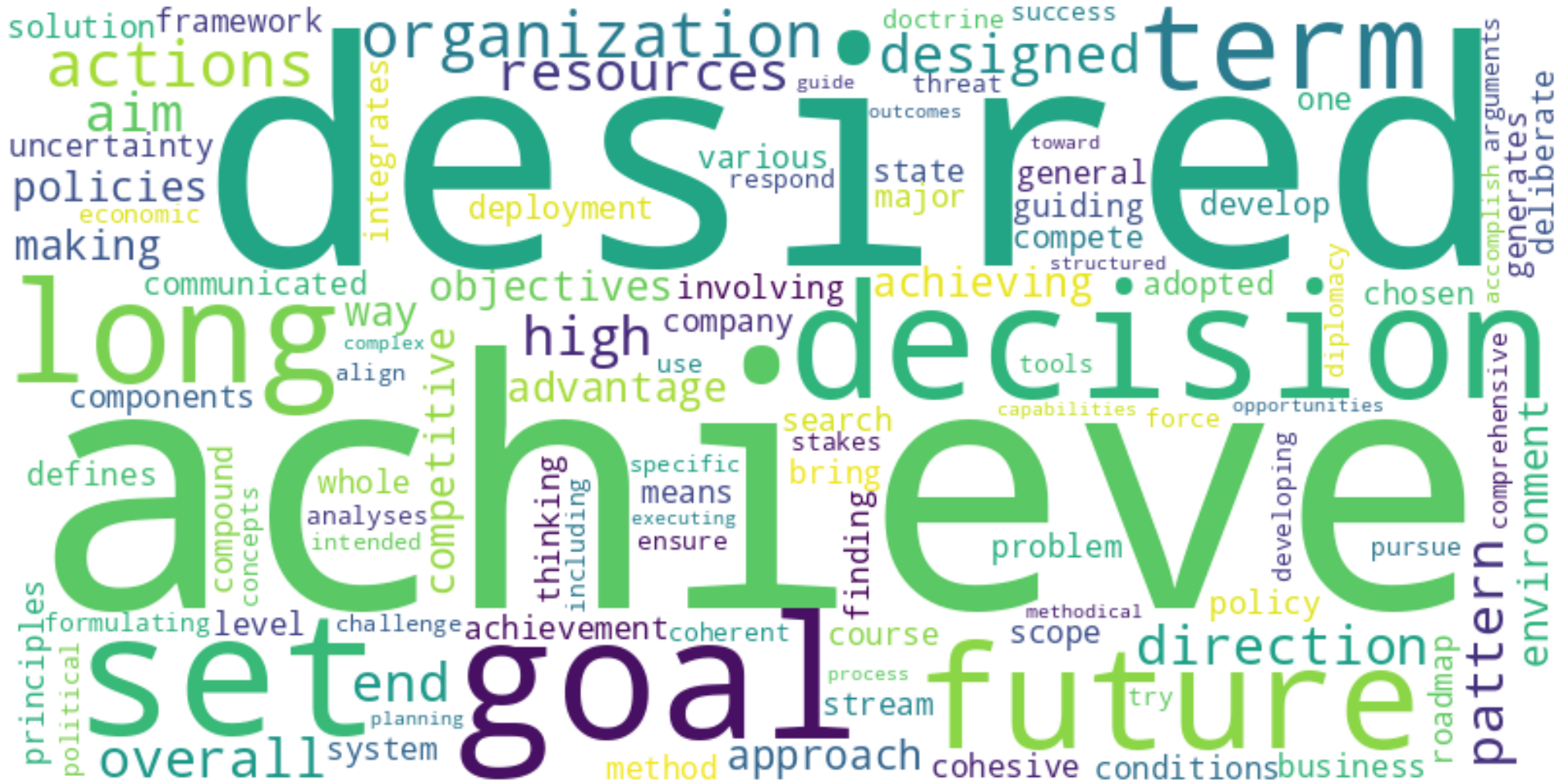
## Why All Plans Look the Same

### Most institutions are ...

- Trying to solve the same problems/have the same pain points
- Looking at the same “peers” or aspirant institutions
- Thinking quantitatively, not qualitatively
- Looking to address institutional weaknesses or build on institutional strengths (internal)
- Uncomfortable with risk or paradigm shifts
- Struggling to prioritize strategic goals
- For some ... they’re not the real strategy!

# Strategic Planning

## What's a Strategy?



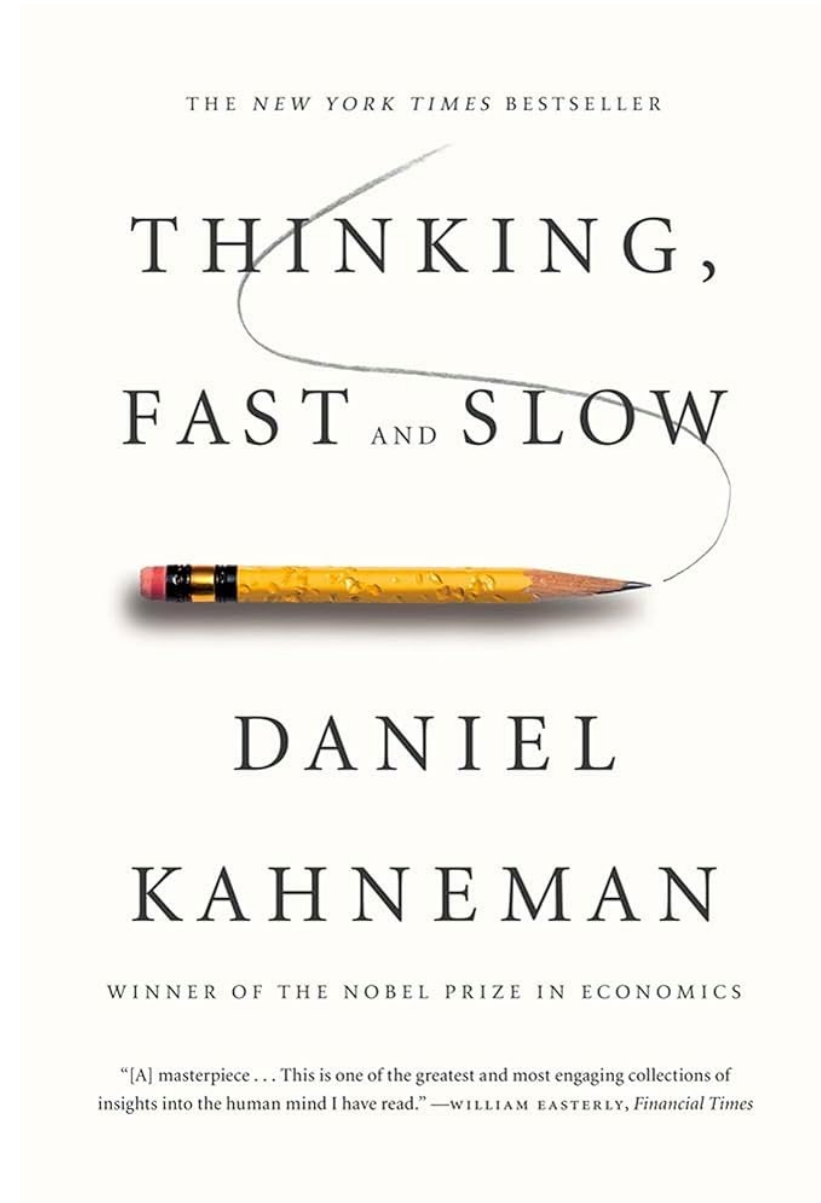


# Strategic Thinking Is Hard!

## Thinking, Fast and Slow

Strategic thinking requires us to:

- **Think slowly**
  - Intuition  $\neq$  sophistication
  - Biases provide an illusion of reliability and confidence
- **Look externally**
  - Not just at what others are doing
  - But at the environment
- **Anticipate the future**
  - Not make assumptions based on past performance
  - Especially difficult in uncertain times





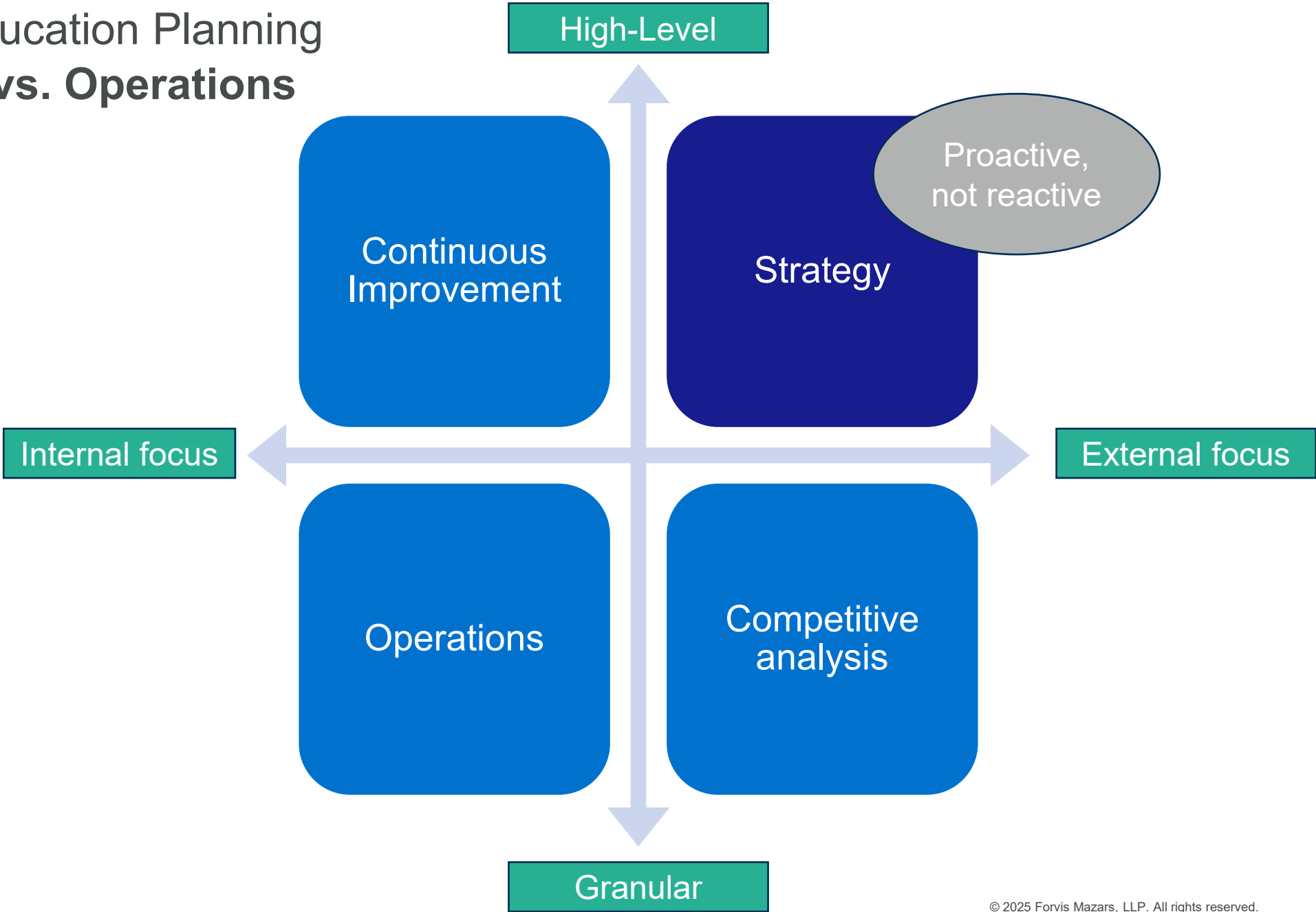
# The Departed

## Organized Crime Can Be Strategic!!



- ✓ Counterintuitive
- ✓ Looks outside the organization
- ✓ Long-term advantage

# Higher Education Planning Strategy vs. Operations



# Strategic Thinking

## The S.W.O.T. Analysis

Should we grow our nursing program?

Internal	
<b>Strengths:</b> strong pass rate on national licensing exam	
<b>Weaknesses:</b> limited awareness of university brand	

# Strategic Thinking

## The S.W.O.T. Analysis

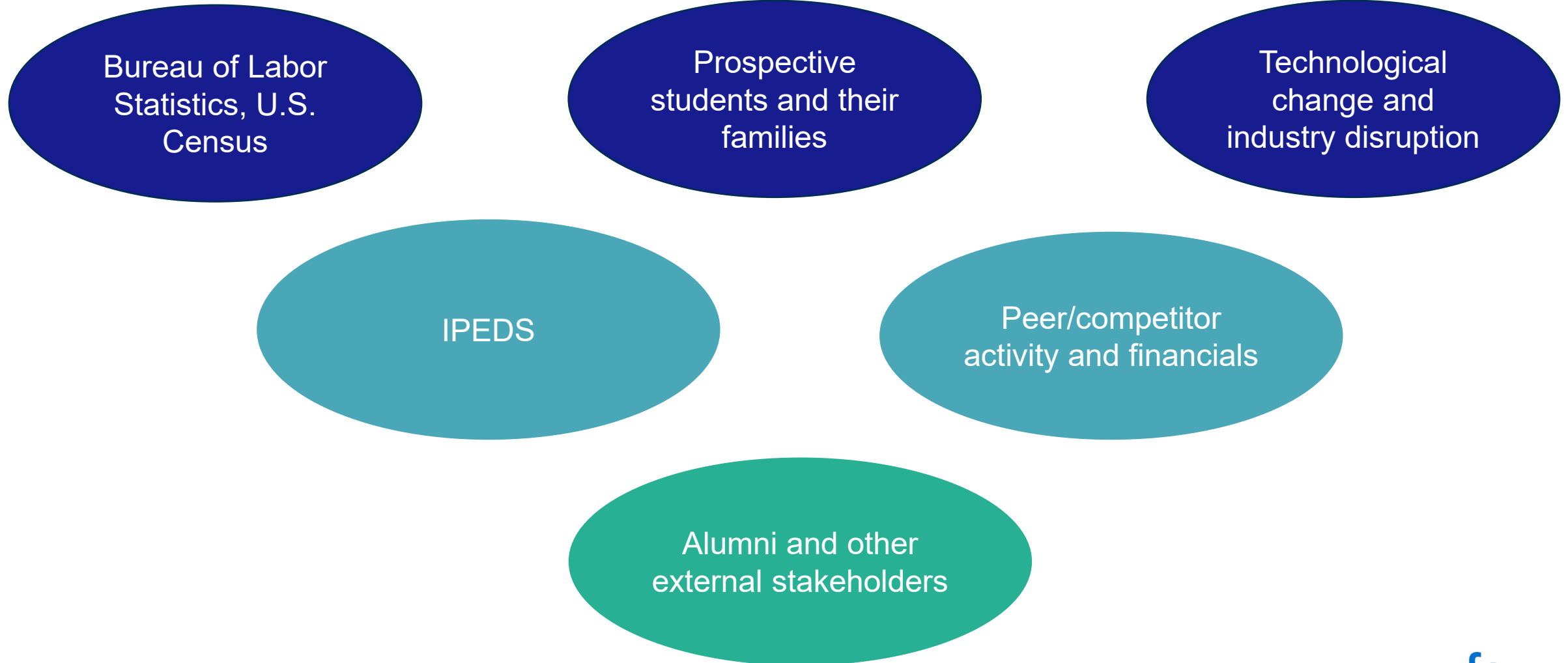
How can we diversify our revenue?

Internal	
<b>Strength:</b> located in a major urban area for the last 100 years	
<b>Weaknesses:</b> not a lot of capital to dedicate to new projects	



# Understanding the Environment

## External Data Sources



# Predicting the Future

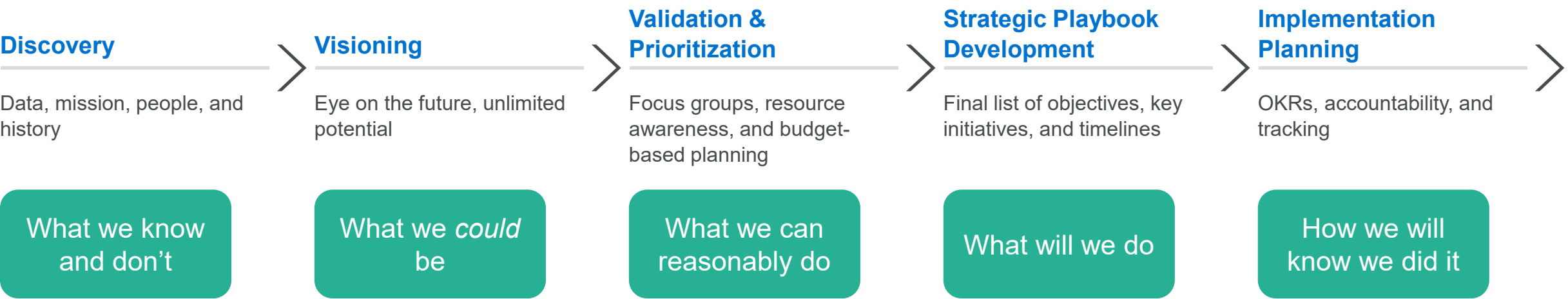
## Using the Right Data

Good external data are:

- Forward-looking or prospective, not retrospective
- A little uncertain, not always a sure thing
  - Use multiple sources to corroborate trends
- Not overly attached to or dependent on the organization/internal environment
- Sometimes qualitative or narrative

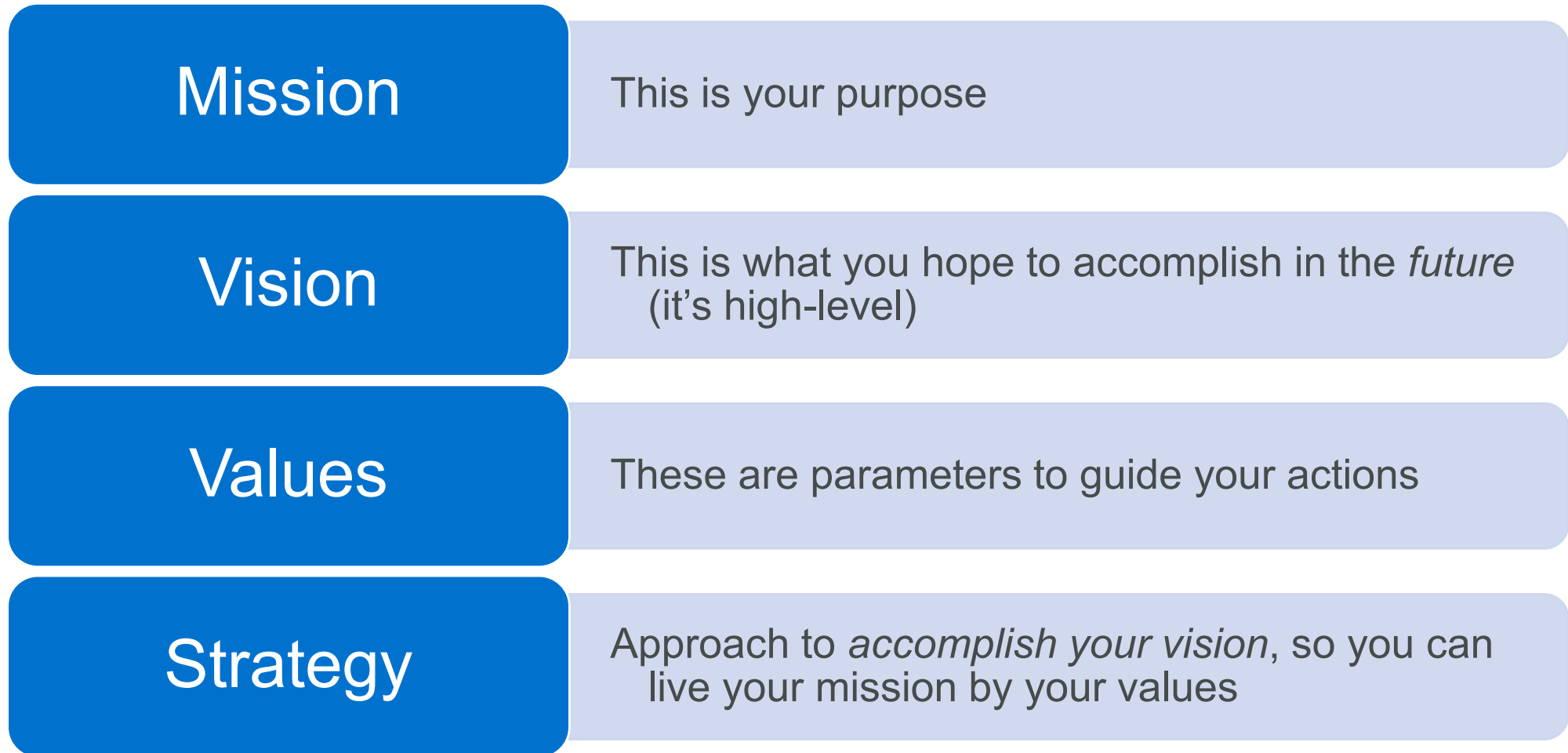
# Strategic Planning

## Basic Process



# Visioning

## Mission, Vision, Values, & Strategy





# Higher Ed Vision Statements

## Do They Inspire Strategy?



# Visioning

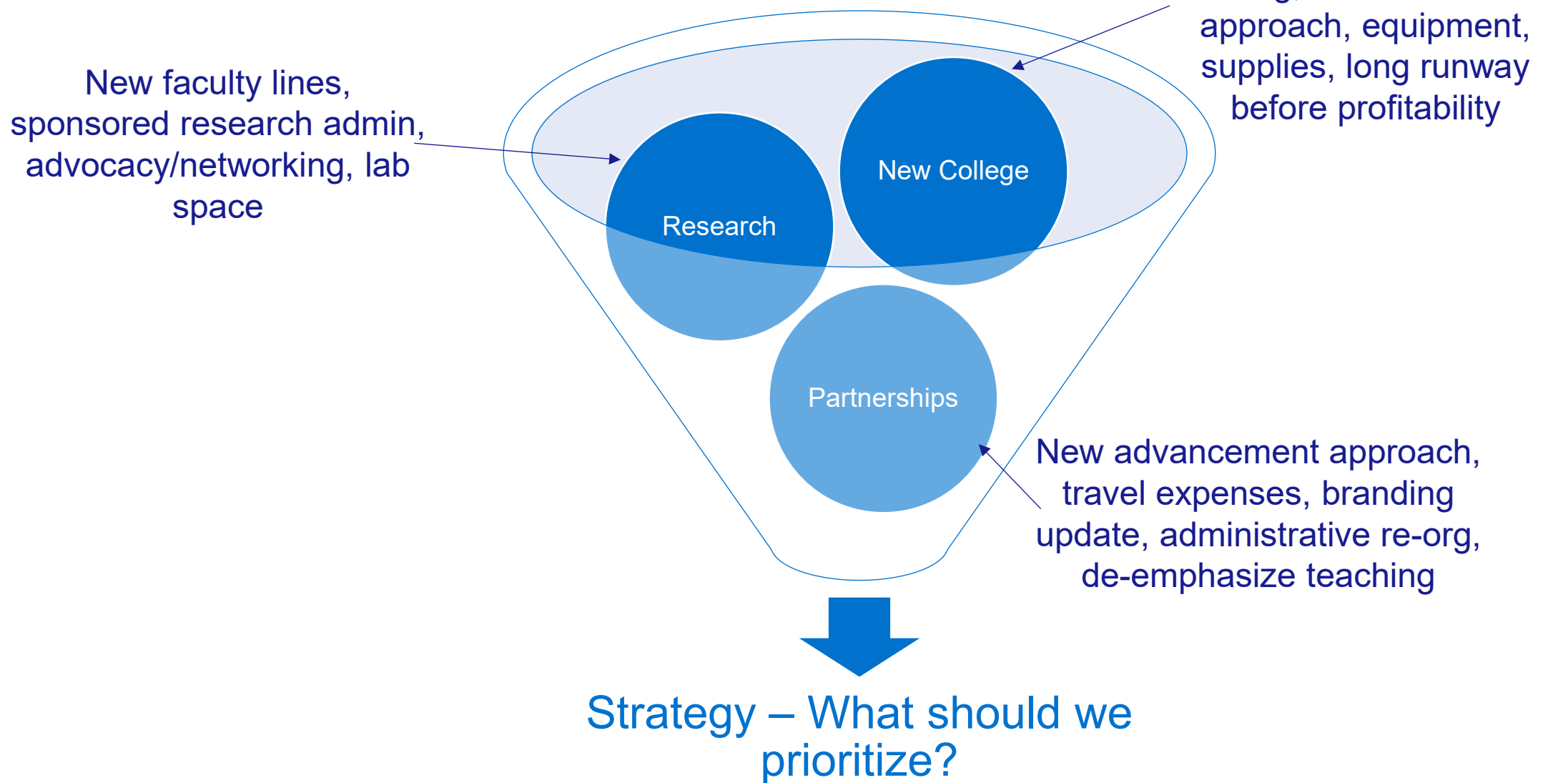
## It's About the Future

A strong visioning process will:

- Arrive at a vision that helps you achieve your mission (assuming your mission doesn't need revisiting)
- Challenge assumptions/rules
- Encourage creative “sandbox” thinking
- Leave biases about the organization and its potential at the door
- Examine your institution's place in the overall ecosystem
- Use external data to inform future trends

# Coming Down From “The Blue Sky”

## Narrow the Funnel, Prioritize Activities



# Prioritizing Key Activities

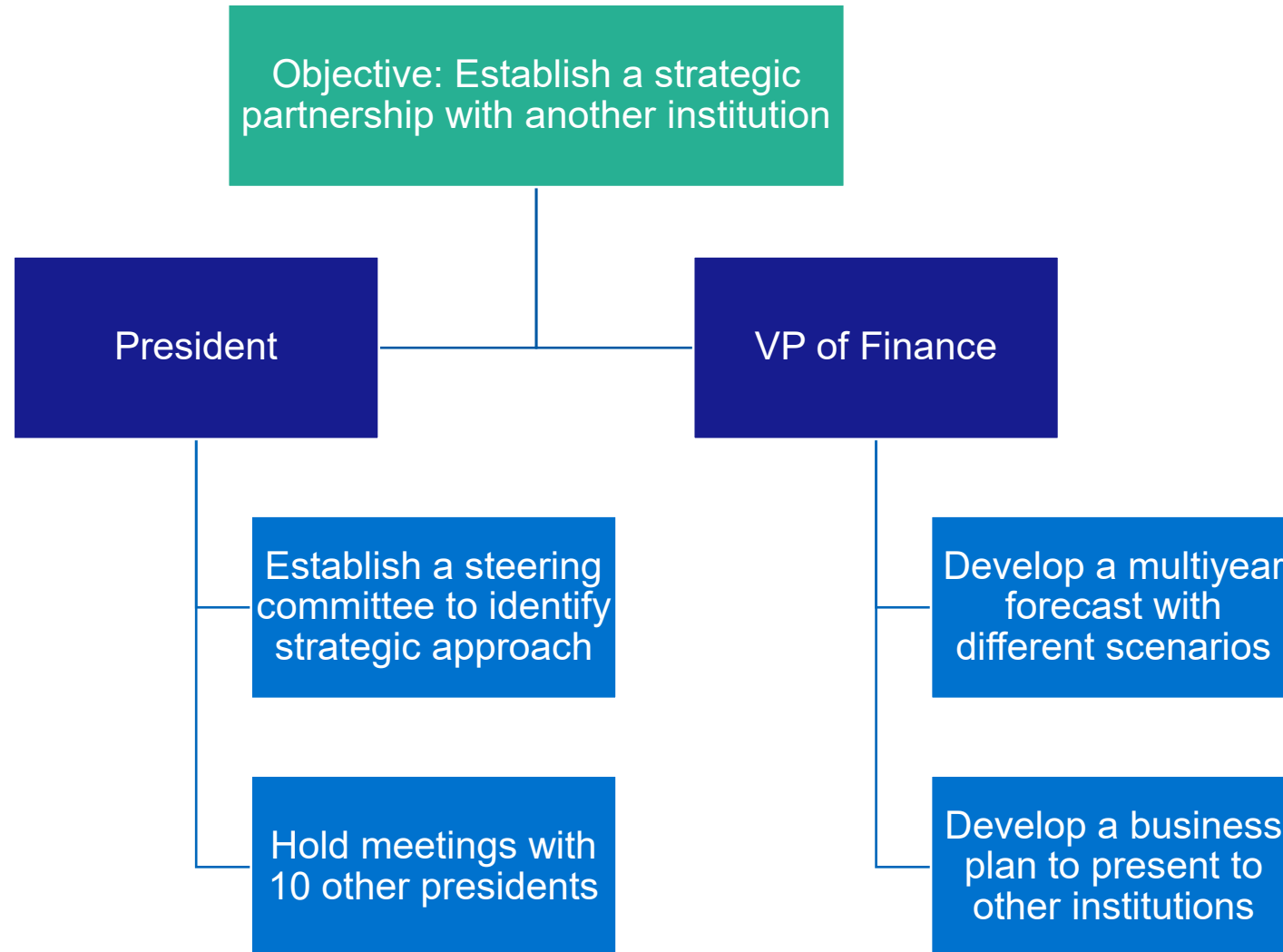
## Prioritized strategic plans:

- Don't try to do everything!
- Have identified needs and costs associated with major initiatives
- Are grounded in institutional resources
- Add value to the institution *in the future*
- Are actionable



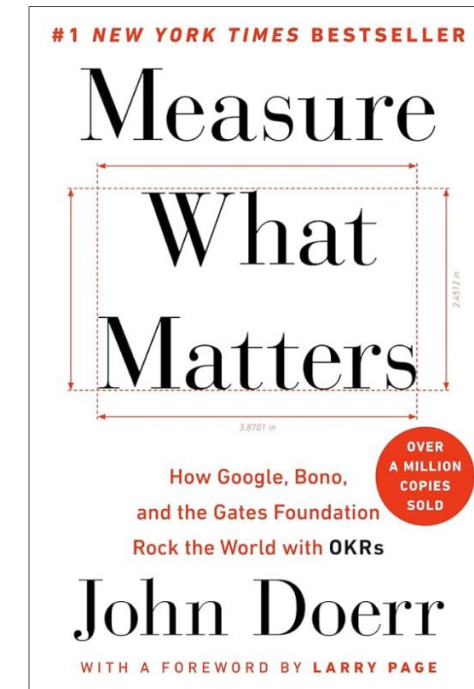
# Implementation

## Measure What Matters



### Implementation Plan Must-Haves

- ✓ Timelines
- ✓ Accountability/champion/key personnel
- ✓ Allocated resources
- ✓ Measurable outcomes
- ✓ Specific action items
- ✓ A system for tracking progress against goals



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# Strategic Thinking In Uncertain Times

Some strategic issues on our minds here at Forvis Mazars' Higher Education Consulting team

## Partnerships

- Consolidation/saturation
- Appetite for private-public?
- Grant money may not look the same

## Programs

- GenAI's impact on credentialing/skills needed
- Workforce of the future
- Demographic shifts for higher ed *and employers*

## People

- Placing and supporting strategic leaders
- Faculty and staff with skills and interest in students of the future
- What will students want in 10 years?

# Tips from the Field

## Higher Ed Strategic Planning

- Avoid the temptation to “double down” on what you’ve always done
- Disruptions are constant; they just differ in scale
- Strategy is dynamic/living; refresh constantly
- Biases are real; consider an outside perspective
- Don’t let it sit; allocate resources to planning and implementation

# Contact

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