

2009 Consulting Highlights

Dear Colleagues and Friends,

2009 was a challenging year for every segment of higher education:

- **The slow-recovering national economy**
- **The ongoing shrinkage of state government investment in public higher education**
- **Rising discounts at private institutions in order to keep market share and support families as they deal with their own economic situations**
- **Institutional budget deficits leading to frozen enrollments, unfilled vacant positions, and layoffs**
- **The continued explosion of community college enrollments, testing capacity limits**
- **Tighter credit markets making facilities financing more complex and more expensive**
- **Many small colleges struggling to survive**

Institutions that understand their program and business models and the different lines of academic business they operate...

- *Focus on core student markets*
- *Communicate with students and parents using appropriate channels and tools*
- *Know who their real competitors are and what they are doing*
- *Offer attractive academic programs*
- *Embrace a multi-year financial strategy, including cost containment or reduction with service improvements*
- *Provide quality academic and student support resources*
- *Deploy technology strategically*
- *Maximize cost-effectiveness*

...are best able to succeed in this sea of uncertainty.

Our continuing mission: to foster the improvement of strategic thinking, planning, realignment, and management in higher education through our cadre of senior, higher education-experienced consultants.

We see our role as helping clients remain focused on the future while grappling with current financial and demographic realities — to help them gain and sustain competitive advantage.

*Inside, you will find examples of our capabilities. If there is perhaps one unifying theme across our work it is this: **To get the right answers, you have to ask the right questions; to get the desired results, you have to harvest the best ideas.** Kaludis Consulting's value emerges from this nexus.*

GEORGE KALUDIS, PH.D.
Chairman and President



KALUDIS consulting

Institutions that understand their program and business models are best able to succeed.

Rollins College

Strategic Review of Adult Learner Programs

Rollins College's President engaged Kaludis Consulting to examine the strategic position of the Hamilton Holt School in serving the adult market. In particular, Rollins was interested in identifying opportunities for improving HHS's competitive advantage. The project included examination of HHS's vision and role within the Rollins College mission, customer base, market opportunities in Central Florida, relationships with 2-year colleges, competitor market, academic program offerings, faculty model, pricing strategy, delivery approach, and business model/financial performance.

Georgetown University

Student Information System Implementation

Kaludis Consulting continued its work with the SIS Executive Committee overseeing the highly successful SIS implementation.

Grand View University

Financial Strategy; Financial Modeling and Forecasting

Grand View University contracted with Kaludis Consulting to provide a financial planning model and initial set of forecasts to assist them in setting strategic and financial planning parameters for its changing future. The engagement dealt with issues related to enrollments, capital planning and budgeting, faculty planning, and overall financial health.

Moravian College and Theological Seminary

Information Technology Strategic Planning

Kaludis Consulting reviewed the Information Technology environment and campus requirements, and existing and planned projects. This input supported a joint effort between Moravian's technology strategic planning committee and Kaludis Consulting to produce a multi-year strategic technology plan.

Fox Chase Cancer Center

Financial Analysis of Research Enterprise

Kaludis Consulting was engaged to assist FCCC in identifying approaches for improving the financial performance of its Research Enterprise. Financial targets for reducing the level of institutional support for research were set through the end of FY2011. We identified FCCC's expense-reduction and revenue-enhancement challenges and opportunities, and developed a pathway for performance improvement and analyzed the financial impact of recommendation actions.

Dominican University

Enrollment Management Strategy and Financial Modeling

Dominican University's President engaged Kaludis Consulting to develop enrollment plans and models for the University. The models were expected to recognize the new complexity of an organization that includes an undergraduate program under the umbrella of one college, but having majors in three colleges; and five graduate schools in various stages of development, with multiple delivery sites and an array of degree and certificate programs. The models included tuition-revenue forecasting by academic unit.

King Faisal University–Dammam

Strategic Plan and Implementation Planning

As a follow on to our conceptual design work to position KFU-D as an economic engine serving national and Eastern Province economic development and strategic workforce needs, Kaludis Consulting produced the Strategic Plan that supported KFU-D's review by the National Commission for Academic Accreditation and Assessment (NCAAA) and prepared a (1) set of implementation plans for the 11 Strategic Goals in the Plan linked to the NCAAA Standards, (2) Strategic Management Plan, (3) Data and Analytical Capacity Plan and (4) Plan for Continuous Planning.

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Bridgewater State College

Financial Modeling and Forecasting

Bridgewater State College contracted with Kaludis Consulting to provide a financial planning model and initial set of forecasts to assist them in setting strategic and financial planning parameters for its changing future. The engagement dealt with issues related to enrollments, capital planning and budgeting, faculty planning, and overall financial health.

University of North Carolina – Charlotte

Admissions and Registrar

Business Process Improvement

Kaludis Consulting reviewed Undergraduate Admissions, Graduate School Admissions and University Registrar processes. We identified policy and organizational issues, recommended process improvements, and provided implementation strategies to reduce paper dependencies, improve operational efficiencies, and develop an integrated digital imaging solution.

Franklin College of Switzerland

Board Strategic Planning; Board Leadership and President Succession Planning

In its fourth set of projects for Franklin College, Kaludis Consulting supported the Board of Trustee, the Board Chair, and the President in reviewing the institution's strategic plan, developing leadership succession plans for both the Board Chair and the President, and creating a concept for the full self-assessment of the Board. The work included facilitating a 3-day planning retreat, where the Board approved a general plan for all of the areas covered.

Humber College

Enterprise System Planning and Selection

Kaludis Consulting developed a foundation for an enterprise resource system (ERP) selection process. This work included a campus needs analysis, systems capability assessment, RFP development, and advice on product selection.

Lake Forest Graduate School of Management

Student Information System Selection

Kaludis Consulting reviewed SIS functional and technical requirements, helped develop SIS vendor/project evaluation criteria, and provide contract and implementation recommendations.

Eckerd College

Update Financial Forecast and Strategy;

Adult Learning and Special Programs Evaluation

Eckerd College has been a long-term financial strategy and planning client of Kaludis Consulting. The financial plan review in this engagement focused on further integration of capital, debt, and fund raising issues within the existing financial planning model and forecast. Using its model and associated plan, Eckerd has made major strides toward rebuilding its financial health.

Eckerd has an active adult learning environment including both credit and non-credit activities, including operation out of on-campus dedicated facilities and rented off-campus facilities. We performed an evaluation that focused on addressing critical issues, including opportunity costs to the College and financial margins of the adult programs.

Messiah College

Information Technology Services Assessment

Kaludis Consulting reviewed the College's information technology environment and IT Service (ITS) Department. This effort included gathering information from the campus community about IT and ITS, comparative analysis (and benchmarking), and recommendations for organizational development, structural, and service improvements.

We provide the perspective and guidance that enable clients to frame, discuss, make, and evaluate decisions and assess performance.

Kaludis Consulting

Kaludis Consulting has been a trusted source of strategic advice for colleges and universities for more than 30 years. We operate at the edge of change, helping colleges and universities develop focus, set direction and achieve alignment — gaining Strategic Traction® in their thinking, planning, decision-making and management.

We provide the analysis, perspective and guidance that enable clients to anticipate the next wave of opportunities and challenges and create the strategic context in which to frame, discuss, make, and evaluate decisions and assess performance.

Our service portfolio includes:

- **Strategic and Business Planning**
- **Institutional Economics and Financial Modeling**
- **Deep Strategy™ Analysis and Resource Alignment**
- **Technology Planning and Enhancement**
- **Executive Transition Support**



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