



**5 Year Strategic Plan  
2022/23 through 2027/28**

**Mission:**

Town & Gown is a support group that connects the community and the university, awards student scholarships and showcases outstanding faculty and student scholars

## **Strategic Planning Team**

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## Situation Analysis

This situation analysis was prepared for Chapman University Town & Gown Strategic Planning efforts. The trends outlined here are affecting higher education in general and to varying degrees Chapman University specifically. We are in a time of extraordinary and profound change. The pandemic is viewed by many as a disruption/interruption of business as usual. While it certainly is that, it also can be viewed as an accelerator of changes already underway.

### External -Trends affecting higher education

The need for student crisis support continues to escalate. Study shows increasing number of 18-24 year olds considering suicide and increasing substance abuse to cope combined with food and housing insecurity, unemployment and underemployment, being fearful of getting sick(or making a loved one sick) and other stressors create a perfect storm of mental health overload.

Online learning taking a larger piece of the higher education pie. On line education can magnify issues of equity. Traditional class schedules may be difficult if juggling family, academic and work responsibilities. Access to technology computers, internet etc can be unequal. Consumers/students have more say in how they acquire education. Increased competition with online platforms, certificate programs, three-year degrees etc.

Financial flux: Budgeting into the great unknown. During pandemic, states cut funding for public institutions. University business models are being looked at differently...ie revenue from room and board. Faculty faced with bigger class loads versus pay cuts. Student enrollment for fall 2020 plummeted.

Many adults and student learners question the value of a college degree. Conventional wisdom has been that a college degree helps in times of economic downturn. Fewer adults now think that. Degrees are declining in value in the labor market.

Student loan debt at an all time high. In 2020 student loan debt reached an all time high making it the second highest category of consumer debt with home mortgages the highest category.

Changes in higher education models. Typically community colleges see an increases when job market is poor. During the pandemic enrollment dropped 30% in community colleges. New competitors are entering he higher education space, particularly online. Shift from teaching to learning and from fixed-time degrees to fixed-outcome and competency based. There is discussion of three-year degrees and subscription fee structure versus credit hour.

Changes in how students connect - on the ground and online. Attending college under the specter of coronavirus means a loss of traditional campus life. Students are feeling isolated...unsure where to go for even most basic help.

The college experience takes a hit - will tuition costs follow?

The college experience has been greatly changed. Students cite inferior learning experiences, inability to access campus services. Many question the value behind the price tag.

Increasing globalization, diversity, equity and inclusion

The US is the number one place foreign students come for higher education. There is a high cost of foreign students staying away. In 20-21 academic year, new foreign student enrollment plummeted 43% due to both the pandemic and issues of immigration. US population is increasingly diverse. Number of children growing up in poverty in this country continues to increase. There are declining numbers of students graduating from high school which means fewer students enrolling in higher education

Faculty and staff are feeling the burn (out)

Converting to online literally overnight, university-wide budget cuts, fear of getting COVID plus mental and emotional stress of supporting student emotional and mental health needs and working long hours create perfect storm for burn-out among support staff and faculty.

*Excerpted from 12 Higher Ed Trends to Watch in 2021 by insidetrack, Insights 01/04/2021*

Internal - Chapman University

**Mission:** The Mission of Chapman University is to provide personalized education of distinction that leads to inspiring, ethical and productive lives of global citizens.

**Vision:** Chapman University will be a student-centered institution, recognized nationally and internationally as a center of academic and personal excellence that prepares our students to contribute to a global society.

**Strategic Priorities:**

- Fowler School of Engineering
- Changing Student Profile
- Expanding our Research Agenda
- Optimizing Our Campus Footprint
- Comprehensive Fundraising Campaign includes growing endowment and offering a wider variety of scholarships

Town & Gown at Chapman University was founded in 1968 to connect the campus (Gown) and the community (Town). As stated in the Bylaws, Chapman University Town & Gown is dedicated to the advancement of independent higher education in Orange County. It provides student scholarships and contributes financially to various needs of Chapman University through membership dues and contributions. It provides a liaison between the University and community by disseminating information about the University and providing programs of special interest. Initially, women were invited to join T&G. Twenty-five years later men were invited to join. Town & Gown brings together community residents, business leaders, alumni, parents and grandparents of Chapman students, current and former Chapman faculty and staff, as well as other friends of the university.

Our main goals are to:

- **SUPPORT** students through the Town & Gown Endowed Scholarship Fund
- **CONNECT** the community and the Chapman Family
- **LEARN** from outstanding faculty and academic leaders during Lunch at the Forum, our annual signature series of five mini master classes

We have proudly made contributions to several projects at Chapman University, including T&G Gardens at Elliott Alumni House, T&G Reading Alcove at Leatherby Libraries, and Gentle Springs Fountain.

Town & Gown has been a part of Chapman for over 54 years. The 50th year celebration was very successful. We grew our visibility, reputation, and impact. We reached and exceeded aggressive goals to grow the T&G Endowment. T&G will celebrate its 60th anniversary in 2028.

Membership: Town & Gown reached an all-time high of around 400 members and has been declining for a number of years. Our membership is predominately over 55 years of age. We lost seven long-time members in the past year.

Town & Gown Endowed Scholarship Fund: Established in 1987 with \$25,000, the Fund has grown to over \$1.3 million with a significant campaign as part of the T&G 50th anniversary year celebration, and two T&G Legacy Gifts realized. 52 Scholars have received scholarships.

Scholarships: We have granted between three to five scholarships annually. A total of 52 recipients have received scholarships. This year we gave five scholarships of \$3250 each. The scholarship conveys prestige to the recipient, who can cite the scholarship as recognition of his/her achievement. It appears the level of need continues to rise for the T&G applicants. Recipients report that the scholarship helps them possibly avoid a second or third job, or enables them to purchase books or other essentials to further their education. Recipients are recognized on our website and at Lunch at the Forum.

Lunch at the Forum: Since 1994 Town & Gown has brought the fantastic speaker series, **Lunch at the Forum**, to its members and friends. Featuring Chapman University's outstanding faculty members and academic leaders speaking on their research, studies, and experiences, Lunch at the Forum has been a highlight for T&G members, alumni, parents, faculty, staff, friends, and members of the community. LATF is our signature series of mini master classes and a key way that we connect the community, university and supporters. LATF attendance has been flat or slightly declining. LATF is held in high regard within the Chapman Community and amongst T&G members.

Members of the **Town & Gown Legacy Circle** have chosen to enhance their legacy by including Chapman University's Town & Gown in their estate plans. Whether it's a gift through one's will, living trust or by beneficiary designation, or perhaps a charitable trust, gift annuity or life insurance policy, legacy gifts are a powerful way to plan for the future while supporting the mission of Town & Gown.

The Town & Gown Board Room is in Beckman Hall, Room 401, on the fourth floor. The room houses our recognition wall.

## Strengths Weaknesses, Opportunities & Threats (SWOT) Analysis

The following input was gathered from Town & Gown members, board members and advisors.

Strengths	Weaknesses	Opportunities	Threats
Dedicated members and board	Lack of advertising/marketing/ PR	Focus on audience 65+	Too much going on at Chapman
Lunch at the Forum	Aging membership & lack of younger members	Attract younger members	Hard to reach young people
Success of 50 Year Celebration	Limited staff support	Focus on retiring faculty and administrators	Parking is difficult and then difficult to get to campus
Endowment over \$1 million	Membership declining	Identify, target, and strategize for different audiences	Getting lost in Chapman's bigness
Scholarships we give	Lack of excursions off campus	Excursions	Meeting Chapman's policies, procedures, and requirements
Focus on students	Problem filling leadership positions	Corporate membership	Some community members have a negative perception of Chapman
Excursions	Lack of clear, consistent communication with members	Student hosts for campus events	Assumption T&G is not open to all
Longevity of T&G	Need more Town members & more Gown members	Expand scholarships - pay it forward	Relevance to younger people and other demographic groups
Chapman Facilities & administration support	Lack of exposure in Orange, So Cal, and beyond	Reach out to alumni	COVID shut down, and restrictions constantly changing
Participation in awarding scholarships	Parking and cost of lunch	Send meeting reminder/agenda week ahead	Disinterest by those who are digitally oriented
Excellent staff support	Large board, lots of committees	Update T&G Website	
Strong organization	Difficulty filling board and leadership positions	Use of technology to draw globally	

Strengths	Weaknesses	Opportunities	Threats
Great leadership	Members not engaged	Access to Economic Forum for T & G Members	
Survived the pandemic	Perception of cliquish, inward-facing	Virtual LATF	
Friendly organization	T&G is not well known on campus	Provide parking for events	

**Mission Statement**

Town & Gown is a support group that connects the community and the university, awards student scholarships, and showcases outstanding faculty and student scholars

**Strategic Imperatives and Goals**

**A. Grow Town & Gown Legacy Circle**

Goal A1: Double the number of T&G Legacy Circle members in 5 years. Note 26 members by the end of 2026-27 academic year

**B. Increase scholarships**

Goal B1: Increase the amount of individual scholarships.  
 Note: Currently, scholarships are in the range of \$3,000 to \$5,000. We would like to see us move toward the higher end of the range. Chapman University notifies us of the total dollars we have available, and the scholarship committee selects the recipients and determines the amount of the scholarships. In recent years scholarships have been in the low end of our range.

Goal B2: Donate \$60,000 over five years to the Town & Gown Endowed Scholarship Fund.

**C. Grow attendance at Lunch at the Forum**

Goal C1: Expand Lunch at the Forum attendance to room capacity in 5 years.  
 Note: Annual Target is 800 participants – five LATFs times Room Capacity of 160 people

Goal C2: Develop online Masterclass Program.  
 Note: We want to develop quality online program such as we did with LATF during 2019-20 year. These can expand our outreach

**D. Increase recognition of Town & Gown brand**

Goal D1: Develop and implement a comprehensive communication marketing plan



## **E. Increase membership and member engagement**

Goal E1: Increase what is offered to T&G members. Develop and implement an annual calendar of activities/events for T & G members by April of each year.

Note: At least one activity per month, LATF is the activity for five of those months, include member recruitment activity in August, piggyback on happenings on campus with a reception of meet and greet. This should be published/distributed before the academic year begins and used to encourage members to renew and prospective members to join.

## **F. Organize the board to focus on the strategic plan and develop leadership.**

Goal F1: Align board and committee structure by implementing recommendations of Ad hoc Task Group by June 2022.

Note: Ad hoc task group is beginning work in December 2021

## **Recommendations**

To implement the new strategic plan, the following recommendations are proposed:

- Focus our efforts and resources on increasing offerings to, and communication with, Town & Gown members.
- Focus the board on the board's role.
- Increase planning to have more to offer to T & G members
- Simplify the board structure, reduce the number of standing committees, utilize ad hoc task groups as needed
- Utilize our limited staff support resources for marketing and communication with members