

# PAU's Path to Inclusive Excellence Strategic Plan 2021–2026

Mission, Vision, Strategic Pillars, Priorities & Goals



**Palo Alto**  
**University**  
Psychology | Counseling



## Message from President Maureen O'Connor

I am pleased to present PAU's five-year strategic plan blueprint, *Our Path to Inclusive*

*Excellence*. This work includes our new vision, mission, strategic pillars, priorities and goals that will propel the university through 2026. The planning unfolded with energy and focus throughout the 2021-2022 academic year and reflects the thoughtful collaboration of our trustees, faculty, staff, and students. I am deeply grateful for the commitment of time made by the planning participants – members of the Strategic Planning Steering Committee and subcommittees – during a year unlike any other in our history! Special thanks to Camille Watson for her excellent leadership of the Steering Committee and to our Board of Trustees for their thoughtful leadership of this process. (*Appendix 1: Strategic Planning Steering Committee Participants*)

We have developed PAU's five-year strategic blueprint during a time of significant institutional strength as well as great uncertainty as we navigate the unknowable influences of a post-COVID landscape. The vision, leadership, and dedication to prepare a bold path forward has been remarkable and was enriched with the generous input we received from students, faculty, staff, and alumni through surveys and conversations throughout the process.

The strategic pillars presented here are the direct result of the work conducted by the planning teams. The priorities they identified were remarkably aligned and provided confidence that not only did we have a clear focus on the future – but that our sense of direction was solid! As we prepare to celebrate our 50<sup>th</sup> anniversary in 2025, we know who we are as an institution, and we are clear about where we need to go as we move into our second half century!

PAU's Board of Trustees and Strategic Planning Steering Committee confirmed early in the process that our new plan would be centered within a framework of inclusive excellence. I am grateful to Drs. Teceta Tormala and Kristel Nazzal for their guidance and help to ensure we navigated our commitment rigorously.

Strategic plans are the roadmaps pointing institutions forward toward future strength, innovative thinking, and clear priorities. They require the discipline of carefully constructed and executed tactics, routine review, measurement and evaluation, and updates to ensure the desired goals are achieved. We will need every member of the PAU community to actively engage in the fulfillment of these priorities and goals and ensure PAU remains at the forefront of counseling and psychology.

## Inclusive Excellence Framework

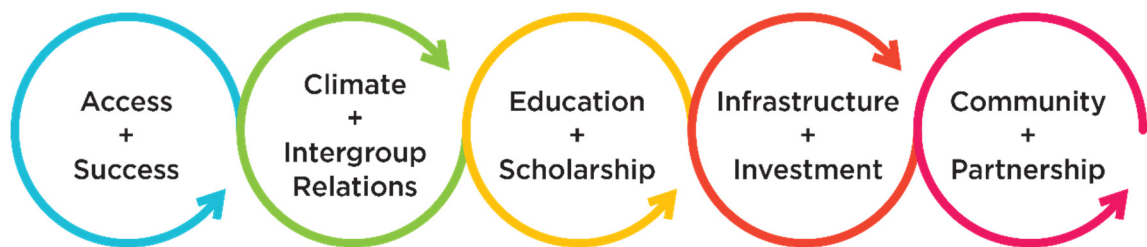
**PAU's commitment to fully achieving the priorities and goals of the 2021–2026**

**Strategic Plan** requires a resolute commitment to view solutions to current challenges through the lens of inclusive excellence. Using this lens to determine the best methods to achieve the goals and to evaluate the results for success means asking questions regarding how best to ensure broad and inclusive access, foster respect and appreciation for individual differences, cultivate a climate of belonging, and champion excellence in academic offerings and service to all PAU constituents. Using such a lens can also identify current practices, policies, and procedures that may have a disparate impact on students, staff, faculty, and community members who may be subjected to marginalization, and thus identify where change must occur to better meet the different and varying needs of all students, faculty, staff, and the broader PAU community.

*—Adapted from Academic and Student Affairs Committee Strategic Planning Report*

### INCLUSIVE EXCELLENCE

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## Introduction

**The development of the 2021–2026 Strategic Plan**, *PAU's Path to Inclusive Excellence*, has been a thoughtful, deliberate process beginning with a Strategic Visioning Process in 2016-2017 (Phase 1), then moving into a comprehensive branding process that defined and articulated the PAU brand during 2018–2020 (Phase 2). Phase 3 was launched immediately after the completion of the branding initiative, taking full advantage of the learnings and

3 / PAU's Path to Inclusive Excellence: Strategic Plan 2021–2026

insights gathered during that effort, and with a commitment to engaging PAU's key stakeholders in the planning process. This phase of work delivered PAU's strategic blueprint for 2021–2026. (*Appendix 2, Pathway*)

The strategic plan articulates PAU's future as it prepares to celebrate its 50<sup>th</sup> anniversary in 2025 and looks boldly toward building on significant areas of strength and deepening its reputation as a national leader in counseling and psychology.

This document presents the deliverables of Phase 3 Strategic Planning, including the development of:

- > New PAU Vision Statement
- > New PAU Mission Statement
- > Preliminary framework for PAU Values discussion (this will be completed by PAU faculty, students, and staff during Phase 4 planning)
- > Strategic Pillars
  - Priorities
    - Key Goals

**The planning process was designed with a commitment to engaging stakeholders** and gathering input and feedback from all PAU constituent groups – faculty, students, staff, board, and alumni. To oversee the process, a Strategic Planning Steering Committee was appointed, and four of PAU's board committees were designed as subcommittees with special areas of focus. (*Appendix 3: Strategic Planning Organizational Chart*)

Three surveys were conducted to gather input and feedback: one specifically targeted to board members and administrative leaders early in the process; a second survey was issued to all faculty and staff to gather additional input on priorities, strengths, challenges, and opportunities; a third survey was sent to a comprehensive list of faculty, students, staff, and alumni inviting feedback on vision, mission, and values.



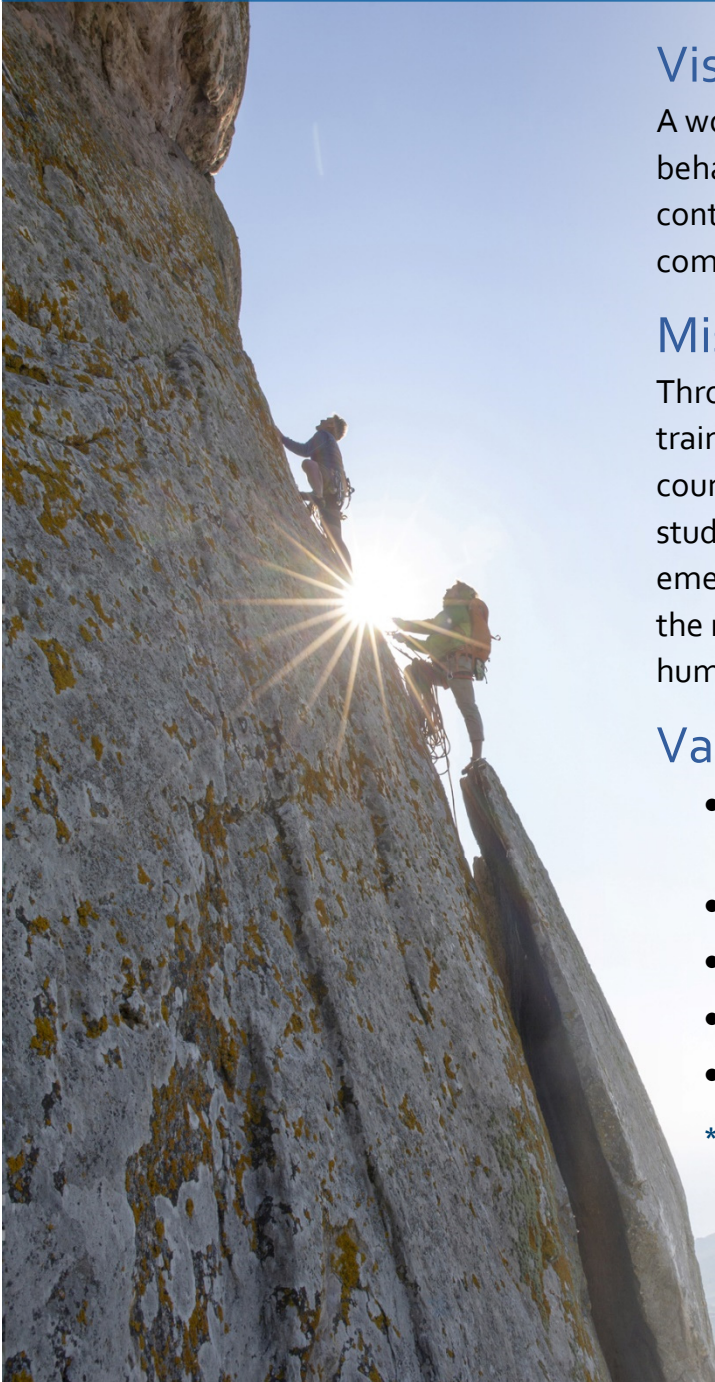
The timeline for completing Phase 3 (*Appendix 4: Timeline*) was managed through multiple checkpoints with the PAU Strategic Planning Steering Committee and PAU Board of Trustees.

The materials presented in this document reflect the excellent work of all planning participants, and the insightful feedback received from outreach through surveys, conversations, and small group discussions. The four planning subcommittees (Academic & Student Affairs; Innovation & Business Development; External Relations; Finance & Risk Management) presented their work to the Steering Committee in early April 2021. The overwhelming overlap, cross-connections, and symmetry between the subcommittee priorities yielded PAU's five strategic pillars and led to the priorities and goals.

In the next phase of the strategic planning process (Phase 4: July 2021 – June 2022 and annually thereafter for review, evaluation, and adjustment), each PAU Division and their constituent groups will be asked to examine how they can best contribute to achieving the strategic plan goals identified in Phase 3 and moving PAU toward the strategic pillars. Phase 3 produced a significant number of preliminary tactics; those tactics have been captured and will be shared with the appropriate committee and PAU Division as they launch the next phase of work to create the tactical plans.

We are grateful to the entire PAU community for their thoughtful participation, engagement, and insight leading to the successful completion of this phase of our strategic planning process.

# Palo Alto University Vision, Mission, and Values



## Vision

A world in which insight into human behavior improves well-being and contributes to just and inclusive communities.

## Mission

Through education, research, and training in psychology and counseling, PAU prepares its students to address pressing and emerging issues that equitably meet the needs of our ever-changing human condition.

## Values\*

- Equity, inclusion, and belonging
- Community
- Excellence
- Compassion
- Innovation

*\* PAU's values will be discussed and refined by the PAU community during Phase 4 of the strategic planning process.*

# Palo Alto University Five Strategic Pillars



## Strategic Pillar 1: Academic Excellence

*Prioritize academic excellence as the cornerstone for PAU distinctiveness.*

### Priority 1: Develop and enhance programs and curriculum.

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#### Priority 1 Goals

- Innovate and promote program development in undergraduate, graduate, and professional training that advances PAU's values, leverages existing faculty expertise and strengths, and builds upon current infrastructures and professional needs.
- Advance innovative programs and services that meet community needs and also serve PAU students and faculty.
- Ensure that DEIB principles are meaningfully integrated throughout the PAU curriculum.

### Priority 2: Invest and advance professional development.

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#### Priority 2 Goals

- Build community partnerships that enhance academic and skill development opportunities for both faculty and students.
- Strengthen faculty and staff capacity to seek, obtain, and manage external funding.
- Enhance faculty development opportunities – especially for supporting evidence-based teaching and engaging with and using research – to advance knowledge and practice in the behavioral health professions.

### Priority 3: Maintain excellence in psychology and counseling education.

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#### Priority 3 Goals

- Continue to develop and expand clinical training and service-learning opportunities for students across all programs.
- Continue to develop and provide cutting-edge and evidence-based professional development opportunities in pedagogy for faculty and graduate students.



## Strategic Pillar 2: Student Success

*Enhance the PAU culture for student-centered excellence.*

**Priority 1: Adopt best practices in providing support services to enhance student success.**

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### Priority 1 Goals

- Expand and communicate equitable access to PAU support systems and student services that promote academic success.
- Review, amend, and promote policies that clearly delineate PAU's expectations for systematic student assessment and evaluation processes in relation to recruitment, retention, referral, remediation, and dismissal.
- Strengthen routine use of data to inform decision-making processes that influence student success.

**Priority 2: Adopt student-centered financial policies and practices.**

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### Priority 2 Goals

- Examine current and develop new approaches to supporting students to ensure optimal use of financial assistance to students.

## Strategic Pillar 3: Operational Excellence

*Invest in operational excellence for innovation and high performance.*

### Priority 1: Strengthen organizational and technological infrastructures.

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#### Priority 1 Goals

- Ensure that PAU's current infrastructure, organizational structure, governance, and communication pathways are properly designed, understood, and resourced to meet the university's inclusive excellence goals.
- Evaluate, refine, build, and leverage university-wide systems, technology, processes, policies, and procedures to ensure maximum operational effectiveness and efficiency.

### Priority 2: Improve operational effectiveness and efficiencies, making the best use of all PAU resources.

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#### Priority 2 Goals

- Clearly articulate direction and goals for innovation.
- Prioritize institutional focus on high-impact initiatives.
- Support professional development and community engagement initiatives for staff.

## Strategic Pillar 4: Awareness

*Enhance PAU's regional and national identity and reputation.*

### Priority 1: Elevate the awareness and reputation of PAU.

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#### Priority 1 Goal

- Generate top-of-mind (unaided) awareness.

### Priority 2: Increase and strengthen engagement with key audiences.

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#### Priority 2 Goals

- Enhance the Alumni Engagement function to measurably increase university and alumni connection.
- Build partnerships with strategically-aligned businesses, agencies, non-profit and governmental organizations that can help PAU advance its educational mission and financial position.

## Strategic Pillar 5: Financial Strength

*Expand resources to support PAU Vision, Mission, and Values.*

**Priority 1: Assure continued strength of PAU's financial position by diversifying revenue sources.**

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### Priority 1 Goals

- Build fundraising capacity to achieve year-over-year growth and support institutional priorities.
- Expand revenue sources through skills-based and professional training that is best-in-class, promotes lifelong learning, and reaches diverse segments of health care and social service providers.
- Review tuition-setting philosophy and policies to best sustain all tuition-generating revenue streams.

**Priority 2: Develop and support initiatives that generate sustainable financial growth.**

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### Priority 2 Goals

- Cultivate corporate and institutional partnerships and sponsorships as a source of revenue – for example, for the Gronowski Center and other PAU clinics.
- Identify resources available to support investment in DEIB commitments, growth initiatives, and other strategic goals.



## Next Steps

### Phase 4 – July 2021 – June 2022

*The Strategic Plan will be reviewed, evaluated, and updated annually.*

DATE	ACTIVITY
<b>July – September 2021</b>	<ul style="list-style-type: none"> <li>Communicate Strategic Plan to PAU community</li> <li>Engage PAU community in Values discussion</li> <li>Review and refine preliminary tactics developed in Phase 3</li> <li>Identify and initiate research and/or outreach activities required for Phase 4 (recommended in Phase 3)</li> <li>Implement early action items</li> </ul>
<b>October – December 2021</b>	<ul style="list-style-type: none"> <li>Develop tactics to support goals</li> <li>Develop metrics for all strategic priorities</li> <li>Develop 5-year strategic timeline for full plan implementation</li> <li>Develop 5-year resource and budget needs</li> </ul>
<b>January – March 2022</b>	<ul style="list-style-type: none"> <li>Refine budget and resource requests and justifications</li> <li>Finalize and communicate PAU Values</li> <li>Develop PAU’s Strategic Planning KPI Dashboard</li> <li>Confirm ongoing plan evaluation, including role, responsibilities and reporting</li> </ul>
<b>April – June 2022</b>	<ul style="list-style-type: none"> <li>Finalize comprehensive PAU strategic plan</li> <li>Develop and launch communications</li> </ul>

## Appendix

- Appendix 1 Strategic Planning Steering Committee Participants
- Appendix 2 PAU's Planning Timeline: Phases 1 – 4
- Appendix 3 Strategic Planning Organizational Chart
- Appendix 4 2020 – 2021 Planning Timeline

## Appendix 1 Strategic Planning Steering Committee Participants

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### Steering Committee

- Carol Bobby, Ph.D.
- Jim Breckenridge, Ph.D.
- Risa Dickson, Ph.D.
- Martin Dodd, J.D.
- James Ioannidis
- June Klein, Ed.D.
- Dan Kostenbauder, J.D.
- Matt Levine
- Daniele Levy, Ph.D.
- Richard Lonergan
- Marilyn Manning, Ph.D.
- Maureen O'Connor, Ph.D., J.D.
- Sara Richter, J.D.
- Karen Scussel
- Thom Shepard, MA
- Donna Sheperis, Ph.D.
- **Camille Watson, MBA – Chair**
- Tom Yeh
- Patricia Zapf, Ph.D.

### Facilitation and Coordination

- Pat Bosse – MPK&D
- Melanie Morrison, MBA
- Mary Pat Seurkamp, Ph.D. – MPK&D

### Academic and Student Affairs Committee

- Mary Anderson, MS
- Jessica Ayres
- **Carol Bobby, Ph.D. – Chair**
- Risa Dickson, Ph.D.

- Amanda Fanniff, Ph.D.
- James Ioannidis
- Michael Kerner, Ph.D.
- Dan Kostenbauder, J.D.
- Maureen O'Connor, Ph.D., J.D.
- Kathryn Pryor, Ph.D.
- **Sara Richter, J.D. – Co-Chair**
- Karen Scussel
- Thom Shepard, MA
- Cristen Wathen, Ph.D.
- Jorge Wong, Ph.D.

### External Relations Committee

- Lisa Brown, Ph.D.
- Anne Farrah, Ph.D.
- Jeff Gee
- Cynthia James
- Dan Kostenbauder, J.D.
- **Matt Levine – Co-Chair**
- Rebecca Levy
- Maureen O'Connor, Ph.D., J.D.
- Sita Patel, Ph.D.
- Sara Richter, J.D.
- **Karen Scussel – Chair**
- Camille Watson, MBA
- Jorge Wong, Ph.D.

### Innovation and Business Development Committee

- Alinne Barrera, Ph.D.
- Jim Breckenridge, Ph.D.
- **James Ioannidis – Co-Chair**
- Dan Kostenbauder, J.D.
- **Daniele Levy, Ph.D. – Chair**
- Derek Minno, CFA
- Maureen O'Connor, Ph.D., J.D.
- Jorge Wong, Ph.D.
- Tom Yeh
- Patricia Zapf, Ph.D.



## Risk Management and Finance Committee

- Carol Bobby, Ph.D.
- Jim Breckenridge, Ph.D.
- Kelly Coker, Ph.D.
- Risa Dickson, Ph.D.
- **Martin Dodd, J.D. – Co-Chair**
- Anne Farrah
- Cynthia James
- June Klein, Ed.D.
- Dan Kostenbauder, J.D.
- **Richard Lonergan – Chair**
- Derek Minno, CFA
- Maureen O'Connor, Ph.D.
- Maya Ramakrishnan
- Tom Yeh

# Appendix 2

## PAU's Planning Timeline: Phases 1 – 4

**Historic Context:** The development of PAU's strategic pathway reaches back to 2002 and the introduction of the PGSP-Stanford Psy.D. Consortium. The Undergraduate Program was added in 2006, and in 2009 the name was officially changed from Pacific Graduate School of Psychology to Palo Alto University to reflect expansion. The M.A. in Mental Health Counseling was added in 2011.

### Phase 1: Fall 2016–Winter 2017 | Strategic Visioning Process

- Board appoints new president
- Intensive focus on structural and operational efficiency and effectiveness
- Purposeful steps toward a unified university
- Objective #1 of new strategic vision states: *“As a unified university, optimize the educational, research, and clinical training experiences of PAU students and faculty.”*

### Phase 2: Spring 2018–Summer 2020 | Defining the PAU Brand

- Multiple focus groups, Zoom sessions, interviews
- 658 completed surveys
- PAU's message platform: *“Palo Alto University is a culturally-conscious community dedicated to addressing pressing and emerging issues through research and training in psychology and counseling.”*
- Brand personality: compassionate, confident, courageous
- Brand book developed

### Phase 3: Fall 2020–Summer 2021 | Shaping PAU's 5 Year Strategic Plan

- Frame strategic pillars and institutional priorities and goals
- Identify resources required
- Recruit and onboard new Provost
- Determine key metrics / KPIs

#### Phase 3 Board Meeting Milestones

- February 24, 2021** – Board receives interim report
- May 12, 2021** – Board endorses strategic pillars, institutional priorities and goals

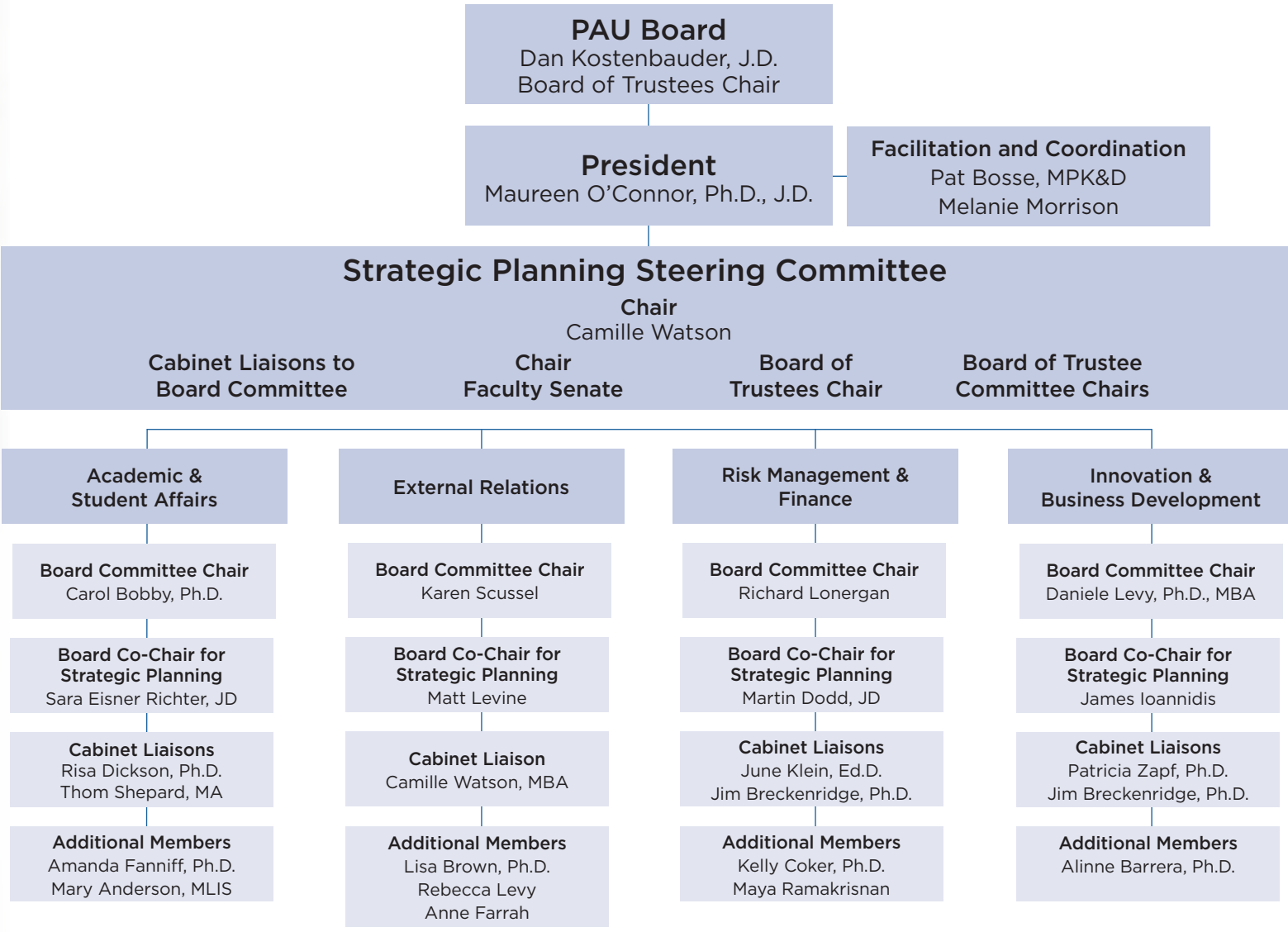
### Phase 4: Fall 2021–Summer 2022 | Building Operational Metrics

- Develop strategies and tactics
- Develop operational plans
- Determine key metrics / KPIs

#### Phase 4 Board Meeting Milestones

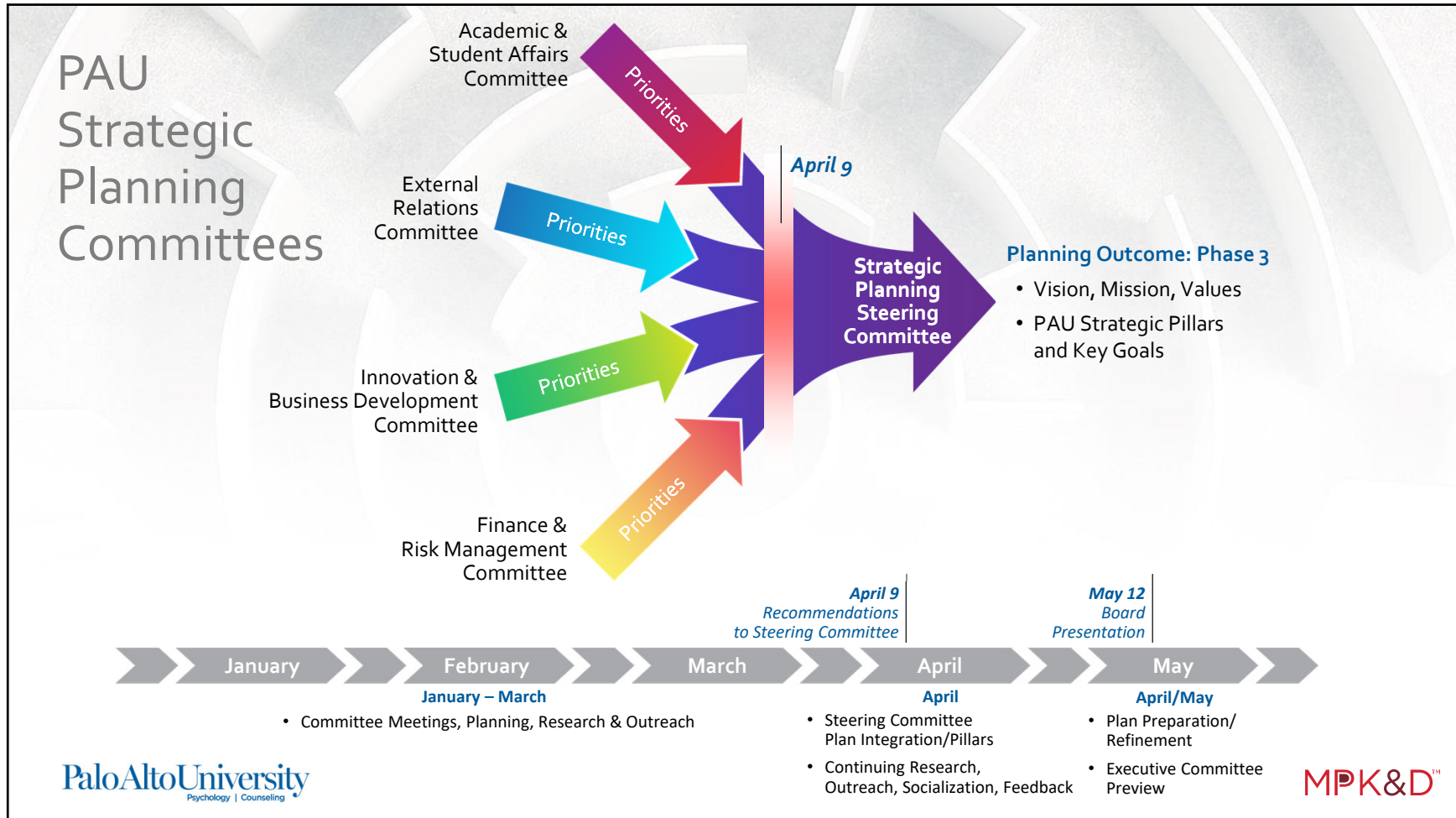
- October 2021** – Board receives interim report on development of strategies and tactics
- February 2022** – Board reviews early draft of comprehensive plan
- May 2022** – Board endorses comprehensive plan

# Appendix 3 Strategic Planning Organizational Chart



Research, focus groups, surveys and interviews will inform our work.  
Additional opportunities for PAU community engagement will be available in 2021.

# Appendix 4 2020 – 2021 Planning Timeline





# Appendix 4      2020 – 2021 Planning Timeline

## Phase 3 Key Milestones Winter/Spring 2021

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- |  |             |
|--|-------------|
| ▪ Strategic Planning Kick-Off Meeting #1                 | Jan 11      |
| ▪ Committee Meetings & Research                          | Jan/Feb     |
| ▪ Steering Committee Meeting #2                          | Feb         |
| ▪ Board Update & Vision Discussion                       | Feb 24      |
| ▪ Steering Committee Meeting #3                          | March 2     |
| ▪ Committee Planning, Research, Outreach                 | March/April |
| ▪ Recommendations to Steering Committee                  | April 9     |
| ▪ Steering Committee Meeting #4                          | April 13    |
| ▪ Continuing Research, Outreach, Socialization, Feedback | April       |
| ▪ Plan Integration, Preparation, Review, Refinement      | April/May   |
| ▪ Executive Committee/Steering Committee Preview         | May 3       |
| ▪ Board Presentation/Endorsement                         | May 12      |