

## **Identity and Mission: A Five-Phase Approach to Discovery in an ATS School**

Periodically, as part of an ATS member school's own strategic-visioning process, ATS Senior Director of Administration and CFO Chris Meinzer is asked to provide presentations to help place the school in the broader landscape of North American theological education. ATS is now seeking to offer these opportunities in a more systematic way to member schools.

Developed during his 20 years with ATS, Meinzer's five-phase approach is designed to complement the strategic planning process of a member school and help the school consider important issues of stewardship around mission & money. Each phase is intended to build upon the earlier phase, so it is assumed that the starting point is Phase 1. It does not assume, however, that a school needs to utilize all five phases. The five phases, briefly described, show how Meinzer works alongside school leadership. The goal is to develop a data-informed and institutionally-appropriate approach to helping the school discover a clear and compelling connection to identity and mission within the broader landscape of North American theological education.

- Phase 1** Meinzer will work with the CEO and other administrators to gain an understanding of the institution over the last decade. Using the ATS Strategic Information Report (SIR), the team will perform a SWOT analysis of the institution's resources. Cost of this phase would be \$0 and it would be facilitated as an e-meeting.
  
- Phase 2** Building off Phase 1, Meinzer will develop a presentation that places the institution in the broader context of theological education in North America. Using ATS-reported data, the presentation will show trends in broad industry context, peer subsets, and institution-specific ways. These trends will be considered around the issues of mission and money, with attention given to enrollment, admissions, completions, finance, development, and other areas that would enhance an understanding of the institution. The presentation in this phase would be given by Meinzer to the CEO and administration, and can be expanded to include faculty and staff, as deemed appropriate. Cost for this phase is \$1,000 (payable to ATS) plus any travel expenses.
  
- Phase 3** Progressing from Phase 2, Meinzer will work with the CEO and/or designees to adapt the presentation from Phase 2 so that it is appropriate for use and discussion by the institution's governing board. The presentation will be used to expand the board's understanding of the context of theological education, the distinctiveness of the particular institution, and the importance of stewardship of the mission and resources to fulfill the mission. The presentation will be offered by Meinzer to the CEO and board. Cost for this phase is \$500 (payable to ATS) plus any travel expenses.

**Phase 4** After setting the institution in a broader context, this phase shifts to moving the institution forward. Meinzer will facilitate conversations with the CEO, administration, and others to establish benchmarks and key performance indicators (KPIs) that measure success toward institutional strategic goals. The purpose would be to identify the most important five to ten measurements of success, how these KPIs would best be measured, and how the measurements would be analyzed as the institution moves forward. Cost for this phase is \$1000 (payable to ATS) plus any travel expenses.

**Phase 5** Along with staff from the institution, Meinzer will help develop and create a visual dashboard that would be utilized by the school going forward. Building off the strength of the SIR, the dashboard would be designed in Excel and would use input sheets that could be updated in a periodic fashion by the institution. Cost for this phase is \$500 (payable to ATS) and would be facilitated as an e-meeting.

**If you are interested in discussing or scheduling any of the phases, please email Chris Meinzer at [meinzer@ats.edu](mailto:meinzer@ats.edu) or call 412-788-6505, ext. 232.**