

Association of Governing Boards of Universities and Colleges

"Alignment, Transparency, and Accountability"

How an innovative, inclusive approach to strategic planning helped AGB set an inspiring North Star and a clear path to success.

40,000+

Members invited to shape the plan

20+

Team members working in the plan

85%+

Year-One goal achievement

THE CHALLENGE

The right moment — and 40,000 voices to hear

With new leadership in place, AGB's board and executive team recognized the moment for what it was: the right time to build a new strategic plan to align the board, leadership team, and organization on a clear vision for the future. In the past, goal setting was mostly operational and department-specific, and teams couldn't necessarily see how their work connected to a larger whole. The team wanted to change that.

"

We don't want to operate in a vacuum. We want to make sure that we are hearing from our members, taking that information into consideration, and not making any decisions without data.

"

— Christina Jacobs, AGB

Planning at AGB comes with a challenge most organizations don't face because of the scale and diversity of AGB's membership: the association serves more than 40,000 members across 2,000 institutions of higher education — and leadership wanted them to have the opportunity to help shaping the plan.

THE SOLUTION

A consultant to synthesize, a platform to scale

AGB partnered with Angela Paik of Cause and Effect Strategies, working on the StratSimple platform, to run an AI-supported listening process open to the full membership, and to turn input at that scale into something a board could act on.

"

It was really helpful to synthesize all of the information that we gathered — and to get us to those overarching objectives, or pillars, that encompass all of the information that's been synthesized.

"

— Christina Jacobs, AGB

AT A GLANCE

ORGANIZATION

AGB — Association of Governing Boards of Universities and Colleges (AGB.org)

MISSION

Serving the governing boards and leaders of higher education institutions and foundations

PROJECT

3-year strategic plan with annual implementation planning

CONSULTANT

Cause and Effect Strategies
Angela Paik



Christina Jacobs

VP of Marketing & Strategic
Planning Lead, AGB

All quotes in this case study are from Christina.

The result was a three-year strategy organized around four pillars, paired with year-by-year implementation plans rather than a static multi-year document.

Why AGB Chose This Approach

Every member, invited to contribute

The plan reflects member priorities — not assumptions made in a vacuum.

Synthesis, not just data

Strategic pillars the board and the whole organization can champion.

Adaptive, not static

Annual implementation plans let AGB adjust every year.

Accountability built in

Named owners, a live dashboard, and regular board reporting keep the plan off the shelf.

“

You have to have a North Star, and you also have to have accountability mechanisms. That's where the dashboard comes in. The technology just makes it much easier to keep on track.

”

— Christina Jacobs, AGB

HOW IT WORKED

From member listening to a plan the whole organization owns

STEP 1

Listening across the membership

AGB invited its full membership (and even recently lapsed members) and peer organizations to weigh in — surfacing higher-order, aspirational priorities, not just individual segments' wish lists.

STEP 2

Synthesis into four pillars

With a landscape review and synthesis of extensive survey and stakeholder interview feedback, Angela guided leadership and the board through a process that resulted in four strategic pillars — an ambitious umbrella plan the board could rally behind.

STEP 3

Annual implementation planning

The team developed a Year 1 plan with objectives, key results, and initiatives, and built a StratSimple dashboard with owners for every objective. With the format in place, the team planned Year 2 directly in the dashboard.

STEP 4

An execution rhythm that stuck

Today, 20+ team members work actively in the plan, and board reports pull progress straight from the dashboard — one source of truth.

THE OUTCOME

More done in Year 1 than anyone expected

To spur collaboration, AGB created an Enterprise Alignment and Growth group, which meets regularly and reports to leadership on shared priorities, progress toward goals, and what they're hearing from members. AGB closed its first year with more than 85% of its Year 1 goals achieved — an ambitious list, in a time of great challenge for higher education. AGB's approach to strategic planning is an exemplar for its members, and a meaningful outcome for an association whose mission is to strengthen board governance.

Ready to simplify your next strategic
planning process?

Learn more at:

- stratsimple.com
- causeandeffectstrategies.com