

Developing a CASE STUDY

A ***Case Study*** typically includes various categories of topics with information about the current state, how the higher education landscape in the coming years has the potential to influence the particular category and what and how the institution should consider and/or plan for its future state.

Categories for a ***Case Study*** might include:

- Background
- External Environment
- Mission/Vision/Values
- Campus and Facilities
- Student Population
- Student Life
- Academic Programs
- Faculty
- Governance
- Strategic Plan
- Finances
- Institutional Advancement
- Challenges and Opportunities Ahead
- SWOT analysis
- Local and Regional Impact Assessment

Data accompanying a ***Case Study*** might include:

- Total Enrollment for the University and by College, by Student Level, by Attendance Status: Fall xxxx-Fall xxxx
- Trends in Undergraduate Admissions Activity: xxx through xxxx
- Trends in Graduate Admissions Activity: xxxx through xxxx
- Faculty & Staff Profile for the University and by College by classification and IPEDS categories: Fall xxxx
- Selected Measures of Instructional Activity by Undergraduate and Graduate Levels: Fall xxxx
- Revenues, by Source: FYxxxx through FYxxxx
- Expenditures, by Category: FYxxxx through FYxxxx
- Balance Sheet Highlights including financial ratios, indebtedness, agency financial ratings and Opportunity Commitments: FYxxxx through FYxxxx
- Anticipated Fixed-Cost Expenditures by Categories over the next x-many Years
- Illustration of Revenue and/or Reallocation Options by Categories given the Anticipated Fixed-Cost Expenditures over the next x-many Years
- Building Resources including gsf, replacement cost, date of construction, building type, deferred maintenance, Facilities Condition Index: FYxxxx

- Illustration of State Capital Allocations and other Capital Investments over the Previous x-many years and Projected projects over the next x-many years
- Building Resources by Space Type: FYxxxx
- Campus Diagram/Map
- Regional Impact Map

Questions about a Case Study include:

- Are there other options to the Case Study strategy?
- How might a Case Study be developed over the Summer?
- What should the attributes be for each section of a Case Study to stimulate the right discussions in the Planning period?