

## **ABOUT AKA|STRATEGY**

AKA|Strategy is a New York City-based strategy consulting firm that works exclusively with leading institutions of higher education and other nonprofit organizations around the world on complex strategic issues.

The firm specializes in transformative strategic work. Our particular interest is in assisting institutions to understand the dynamics and implications of the rapidly changing landscape of their worlds and to craft with them thoughtful and imaginative ways of taking best advantage of their strengths, situation and possibilities.

We have a strong track record of helping institutions to delineate bold visions; clarify their mission and identity; and prepare strong, clear and transformative strategic plans. We are also highly experienced in planning for and mounting successful major fundraising campaigns; preparing business and long-term financial plans; devising clear and supportive organizational structures; strengthening governing boards; and strategic and executive coaching.

Our website – [www.akastrategy.com](http://www.akastrategy.com) – provides considerable background information about the firm, our consulting team, client assignments and case studies of client projects.

### **1. SPECIFIC QUALIFICATIONS TO ASSIST SUNY MARITIME COLLEGE**

We are highly experienced in conducting strategic planning processes for a wide range of colleges and universities and their academic units. Our work has involved us in every facet of strategic planning, from design and facilitation of the process to supporting implementation.

AKA has considerable experience directly relevant to the proposed assignment for Maritime:

- We led SUNY's 2009 and 2010 system-wide strategic planning process in collaboration with its then newly appointed Chancellor, Nancy Zimpher, her senior leadership team, and representatives of SUNY's 64 universities, colleges and community colleges. Our work included facilitation of a transparent, inclusive planning process that involved an 18-person strategic planning steering committee; a group of 200 representatives of SUNY's 64 campuses; and ten "statewide town hall conversations" that drew in additional constituents from across New York State. AKA drafted the final strategic planning document, which articulated six "big ideas" supporting SUNY's overarching vision of "revitalizing the economy of New York and enhancing the quality of life for its citizens."
- We assisted SUNY FIT President Joyce Brown in the development of a metrics "dashboard" for measuring progress in accomplishing the goals of FIT's 2005-2011 strategic plan. As a result of this work, the College determined that significant revisions to the plan were required. FIT retained AKA to facilitate a "refresh" of the plan in a transparent and highly-inclusive process, culminating in the release of the College's 2012-2020 strategic plan: *Our Legacy, Our Future: FIT Beyond 2020*.

- In 2011, we facilitated a strategic planning process for the Seaman’s Church Institute (NY), playing similar roles to those we have described for AKA in this proposal and working with SCI’s executive director and a strategic planning committee of the Board of Trustees. Of particular importance was our “environmental scan” of the maritime environment, which we undertook through extensive interviews and conversations with executives in the open-sea and inland waterway segments of the maritime industry, U.S. Coast Guard representatives, advocates for seamen’s rights, trade association representatives, port chaplains, seamen and tugboat captains, as well as visits to major U.S. river- and seaports, tours of shipping vessels and tugboats, and participation in tugboat simulation training.
- We have assisted a wide range of other leading colleges, universities and state university systems in the U.S. and Europe with strategic planning and counsel – including Bard College, Barnard College, Baruch College (CUNY), Brown University, Cambridge University, Case Western Reserve University, City University of New York, Columbia University, Cooper Union, Florida State University, Fordham University, University of Hong Kong, Hunter College (CUNY), University of Illinois System, INSEAD, University of Michigan, MIT, New York University, University of North Carolina at Chapel Hill, Oxford University, Pace University, Polytechnic University, Queens College (CUNY), Radcliffe College, Southern Methodist University, Villanova University, and Yale University, among others – and thus have a deep understanding of the complex and evolving challenges and opportunities facing higher education today

## **2. KEY PRINCIPLES GUIDING AKA’S CONSULTING PRACTICE AND AN OVERVIEW OF THE FIRM’S CONSULTING APPROACH**

AKA’s consulting practice is grounded in a number of fundamental principles:

- We believe that each of our clients has its own history, situation, culture, values, program focus and strategic positioning. Consequently, we ensure that our work is hand tailored to meet our clients’ needs, and we consistently strive to exceed our clients’ expectations with respect to the value we provide. We are not a commodity provider of strategic counsel.
- We assist only educational and other nonprofit organizations and thus bring to each assignment an unusual breadth and depth of experience and understanding of the culture, values and dynamics of these sectors.
- We are more interested in transformative strategic work that creatively grapples with complex issues than incremental approaches that do not seek to successfully take advantage of an institution’s strengths, opportunities and position – particularly in view of the complexity of the rapidly changing contemporary world and the unexpected suddenness of significant challenges and unforeseen impacts.
- Our team prides itself on the quality, thoroughness and insightfulness of its work, not just with respect to identifying, delineating and articulating key issues, but also in taking account of a host of other matters – including communications,

engagement and outreach – that have a direct bearing on successful coordination, management and oversight of a business or strategic planning process.

- We are highly familiar and exceptionally comfortable with the ambiguities that typically exist in the strategic planning process at complex institutions. We believe that rather than sidestepping ambiguity, those involved in planning should welcome it as a potentially rich source of new ideas.

We seek to understand as fully as we can the nature of the issues, the reasons the prospective client is thinking about engaging professional counsel and how we can be most helpful.

- Our goal is to ensure that we understand the backdrop to the present situation and that the objectives of the proposed assignment have been well thought through.
- We customarily meet with both board leadership and principal staff in order to ensure that these preliminary discussions are comprehensive and thorough.
- We also want to make certain there is excellent chemistry and superb communication between the prospective client and ourselves.

We seek to gain as full an understanding of the client’s culture, situation and needs as possible in the early stages of an assignment.

- As our analyses proceed, we develop “working hypotheses” in order to summarize the work and enable the client to gain immediate access to our findings.
- Working closely with the client, we revise the “working hypotheses” until we have developed the best set of conclusions and recommendations.
- A project may involve interviews with key individuals within the organization; interviews with informed individuals outside the organization; focus groups; compilation and analysis of data from various sources; and analyses of best practices from other peer organizations.
- We maintain strict confidentiality throughout all phases of a project and in all aspects of our work.

We maintain regular communication with our clients, providing interim progress reports and frequent informal briefings and, as appropriate, modifying the work as initially conceived.

- We give careful attention to adhering to the agreed-upon timeframe for the assignment.
- We are keen on ensuring that there is full transparency between the client and ourselves; that the client is fully and continuously informed of our work; and that

the client does not experience surprises or unforeseen complications at any stage of the planning process.

- Further, we believe that the best consulting assignments engage key stakeholders – in thoughtful and appropriate ways – so that it is clear that everyone has had multiple opportunities to contribute to the consulting process in appropriate ways.

Our goal is to develop a solid partnership with the client, defined by strong mutual trust and regard, so that the combination of our strategic skills and the client’s institutional knowledge produce accurate, compelling and high value-added results.

- We participate in brainstorming and are experienced troubleshooters. We try to see the forest *and* the trees.
- We seek to strengthen organizations through constructive change. We actively think through with the client what is required within the institution to carry forward the results of our strategic analyses and effectively execute our recommendations.
- We often assist with implementation planning and monitoring in a separate phase of an engagement.

### 3. CONSULTING TEAM

#### *Anthony Knerr*

Anthony Knerr is Managing Director of the firm and has over twenty-five years of consulting experience assisting a wide variety of leading nonprofit institutions in the U.S. and around the world. He has led more than 120 strategic planning processes for clients of the firm.

He was previously Executive Vice President for Finance and Treasurer of Columbia University and Vice Chancellor for Budget and Planning of the City University of New York. Earlier he was Special Assistant for Budget and Planning to the Acting President of Yale University; an Associate with the consulting firm of Booz, Allen & Hamilton; and a Program Officer with the International Exchange Program.

Dr. Knerr has taught at Columbia College, Columbia University Graduate College of Business, Indiana University, the New School, and Yale University. He has written and published widely on strategy, non-profit organizations, public policy, higher education and literature.

Dr. Knerr is currently Treasurer of Words Without Borders and a Board member of the Keats-Shelley Association and New York Society Library. He recently stepped down as Coordinating Director of the Delaware Group of Mutual Funds. In addition, he is President Emeritus of the Sea Turtle Conservancy and President Emeritus of United Neighborhood Houses of New York City. He has previously served on numerous other nonprofit and

corporate boards. He is a member of the Foreign Policy Association, New York Economic Club and Phi Beta Kappa.

He received his B.A. *magna cum laude* in mathematics and philosophy and his M.A. *cum laude* in English literature from Yale University and his Ph.D. in English literature from New York University.

### ***John M. Braunstein***

John Braunstein, a Director of the firm, has extensive experience in education strategy and planning. With AKA, he has led engagements for a wide variety of higher education clients, including Baruch College, Brown University, Case Western Reserve University, City University of New York, Drexel University's College of Engineering and School of Education, Fashion Institute of Technology, Florida State University, Fordham University, Hunter College, Pace University, State University of New York (SUNY), University of Akron, the University of Illinois System, University of the Sciences in Philadelphia, and Villanova University.

He was previously a Senior Associate in the Higher Education Consulting Group of Coopers & Lybrand, a Senior Consultant in Higher Education at KPMG Peat Marwick, and a Principal in the higher education practice of The Stillwater Group. His clients in these positions included the Archdiocese of Philadelphia Secondary School System, Brooklyn College, Columbia University, The Educational Testing Service, University of Maryland System, University of Missouri, MIT, Stanford University School of Medicine, University of Pennsylvania and Yale University.

Mr. Braunstein has also served as Associate Provost for Enrollment and Planning at Hebrew Union College – Jewish Institute of Religion; Interim Associate Provost for Enrollment Management and Dean of Admission at Franklin and Marshall College; Vice Provost for Enrollment Management at Iona College; Associate Director of Admission at Oberlin College; and Assistant Director of Admission at Brown University.

In addition, he directed the college counseling program for the Philips Academy Summer Session, served as an alumni admission representative for Brown University, lectured on American graduate education to students and faculty at Shanxi Agricultural University, (People's Republic of China), and has served on the International Parents Advisory Committee of Spence-Chapin Services to Families and Children.

He received his B.A. degree in Semiotics (now the Department of Modern Culture and Media) from Brown University and his M.B.A. in Management of Organizations and Marketing from Columbia University. In addition, he holds a certificate from Harvard University's Management Development Program.