

Strategic Planning Process

California State University, San Bernardino
January 21, 2015

Goal

Facilitate process that builds from areas of strength, promise & opportunity to create a Strategic Plan that will guide the future of CSUSB 2015-2020.

Steps & Schedule

1. Preparation	<i>“Getting Started”</i>	Aug. – Oct. 2014
2. Town Hall Meeting	<i>“Bringing Everyone on Board”</i>	Oct. 2014
3. Strategic Research	<i>“Discovering the Dots”</i>	Oct. – Dec. 2014
4. Draft Vision, Mission and Goals	<i>“Connecting the Dots”</i>	Jan. 2015
5. Formulate the Desired Outcomes	<i>“Charting the Course”</i>	Jan. – Mar. 2015
6. Determine the Strategies	<i>“Setting the Sails”</i>	Mar. – May 2015
7. Draft/Review Strategic Plan	<i>“Beginning the Journey”</i>	May 2015

Step 2 (Oct.)

Initial Meetings:



Town Hall Meeting

Small Group Discussions



Step 3 (Oct./Nov.)

Strategic Research:

Conversations with:

- Faculty, Staff, Students
 - Campus Leaders
 - In class
- Leadership Retreat
- Town Halls
- Campus Forums

Goal: Engage everyone

Analyze Existing Data

Gather Additional Information

Step 4 (January, 2015)

SPAC has drafted Vision, Mission, Strategic Priorities/Goals

- Core Values, Vision, Mission
- Strengths
- Needs/Opportunities
- Major Forces
- Planning Assumptions
- Top Strategic Priorities/Goals



Elements of a Strategic Plan

✓ What are the fundamental beliefs?

✓ Looking into a crystal ball, what is our ideal future?

✓ Who are we?
What do we do?
Whom do we serve?

How are we different?

✓ What do we have to do to achieve Mission and move forward?

How will we know when we have arrived?

Desired Outcomes

What are we going to do to achieve our Desired Outcomes?

Why? What? Examples



←



← Strategic Position

← Inside ⇌ Outside

←

Step 4, cont. (Today)

- Second Town Hall and Small Group Discussions
 - Share Core Values, Vision; Mission; Strengths, Needs; Major Forces; Planning Assumptions; Strategic Priorities/Goals



Next Steps

Step 4 (January, 2015)

1. SPAC refines values, mission, vision, strengths and needs, planning assumptions, strategic priorities/goals
2. SPAC creates a cross-divisional Working Group for each Strategic Priority/Goal
3. Estimate revenues from traditional sources based on historical trends and planning assumptions: enrollment, etc.



Step 5 (Jan./Feb. 2015)

Formulate Objectives – “Charting the Course”

- Working Groups identify the Objectives, e.g.:
 - *Increase first-year retention to 65 percent*
 - *Double transfer students to 4-year institutions*

Step 5, cont. (March, 2015)

- Third Town Hall Meeting (March 10, 2015)



Core Values

- Learning
- Inclusivity & Diversity
- Social Justice & Equity
- Transparency
- Respect
- Integrity
- Sustainability
- Wellness & Safety
- Innovation

Vision

CSUSB will be the region's premier comprehensive university of choice.

Mission

CSUSB is committed to ensuring student learning and success; to conducting research, scholarly and creative activities, and to being actively engaged in the vitality of our region. These principles endure in the University's commitment to the value of diversity and intercultural competence, in its tradition and standards of excellence and in its dynamic engagement in our region and in California. We pursue our mission while cultivating the professional, ethical, and intellectual development of our students, faculty and staff to thrive in a globally connected society.

Research Findings

■ Major Driving Forces

- State funding; State and local economy; CSU enrollment caps
- Demographics
- Competition
- Technology
- Global events: mental health, safety, race/racism, veterans

■ Greatest Need & Opportunity

- Basic, tech, and communication skills; transition from school to demand careers
- Community demand careers in healthcare, social work, education, business, computer science, engineering
- Diversity
- PDC campus

Research Findings Con't

▪ Region's Anticipated Demographics

- Hispanic
- College-going age
- Adults leaving jobs and retraining
- Military veterans
- Men in college
- Diversity: sexual orientation, ethnicity

▪ Anticipated Workforce Needs & Programs

- Healthcare, social assistance, education, business professionals, computer science, engineering, business, social work
- Experiential learning, written and oral communication skills, critical thinking, problem solving, community

Research Findings Con't

■ Planning Assumptions

- CSUSB expecting 3% growth; governor funding 1% growth (restriction)
- Increase in Frosh, grad students in Edu, international, college-going, Hispanic students, diversity
- Decrease in transfer students

- Push to be a model for minority serving institution
- Uncertainty with tuition; more reliance on other revenues
- CSU funding remains stable

Recommend

- Focus on multiple metrics that meet the first 3 goals

Strategic Priorities/Goals

1. Student Success: Provide learning experiences to promote student success, achievement and academic excellence and prepare students to contribute to a dynamic society.
2. Faculty and Staff Success: Foster Innovation, Scholarship, and Discovery for Faculty and Staff Success.
3. Resource Sustainability and Expansion: Steward Resources for Sustainability, and Acquire New Sources of Funding.

Strategic Priorities/Goals Con't

4. Community Engagement and Partnerships: Serve and engage communities (local, regional/state, national, global) to enhance social, economic and cultural well-being.
5. Identity: Build an identity that celebrates the uniqueness of our campus, promotes our accomplishments, and inspires involvement.

Small Group Discussions

- **Small Group Discussions (40 min.)**
 - **Select one person to facilitate and report out**
 - **Record thoughts on clarity and missing items**
 - **Highlight the top 3 ideas for each question**
- **Large Group Presentation (50 min.)**
 - **Facilitators will report answers to questions**
 - **Questions and comments from the floor**

Guidelines

- Focus on ideas and concepts
- Feel free to speak your mind
 - “What’s said here, stays here”
- Rank doesn’t matter
- Encourage everyone to talk

Small Group Questions

Each small group will address two questions about the Core Values, Vision, Mission, and Strategic Priorities/Goals:

1. Are there any ideas or concepts in the statements that are not clear?
2. What, if anything, is missing from the statements?

Large Group Presentations

Responses are community feedback to SPAC

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