

Strategic Planning Process

California State University, San Bernardino
October, 2014

Facilitated by: Jolene Koester

AASCU-Penson Center

Goal

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

Characteristics of Successful Planning

- Vision- and Mission-Driven
- Positive & Optimistic
- Builds on Past
- Developed by Campus
- Open & Collaborative
- Focused & Implementable
- Conversational
- Creative

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



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Strategic Position



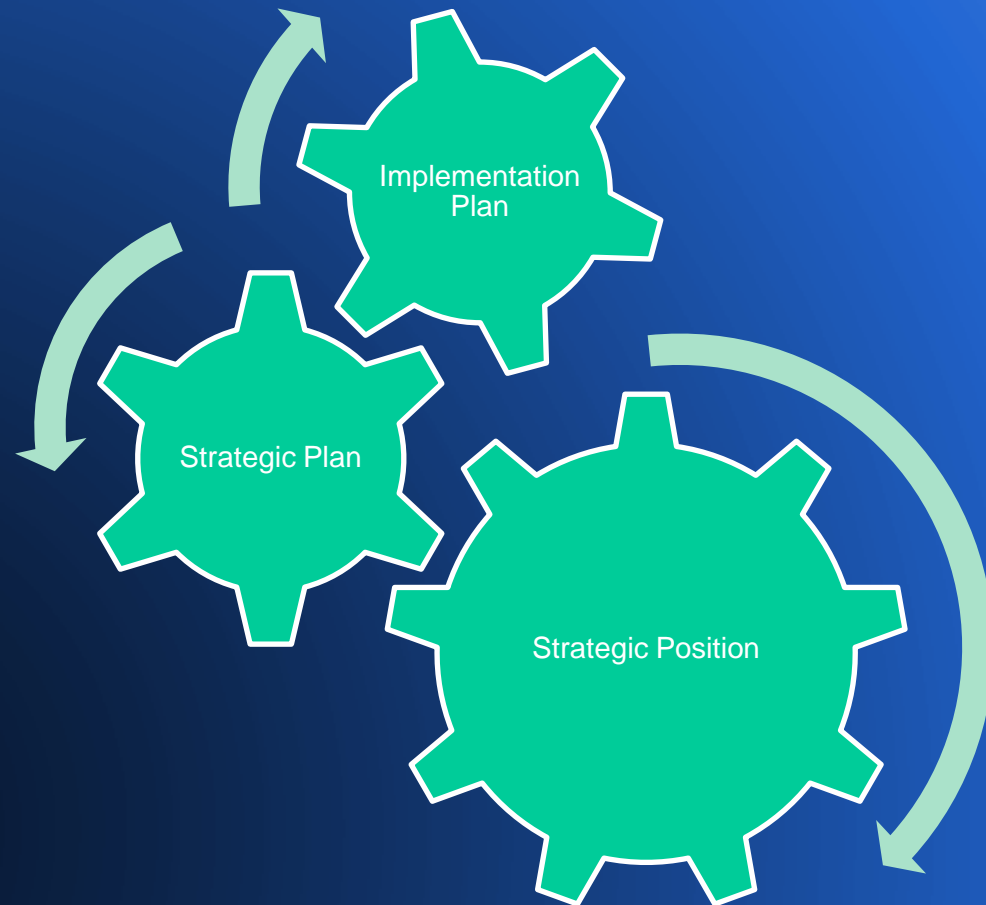
Inside ↔ Outside



Strategic Position

- The location of CSUSB relative to other institutions.
 - Map Your Competitive Space
 - Who Else Does What You Do?
- Image or “brand”
 - Internally & Externally
 - To community, region, state, nation
 - Prospective students, faculty, staff
 - Larger Higher education community
- **The Key: How are we different?**

Strategic Positioning



Steps & Schedule

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

Step 1 (Aug.-Oct.)

Preparation – “Getting Started”

- Refine process
 - Roles & relationships
- Review documents
- Develop communication plan
 - Internal
 - External

Step 2 (This Week)

Initial Meetings: “Bringing Everyone on Board”



Town Hall Meeting

Small Group Discussions



Step 3 (Oct.-Dec.)

Strategic Research: “Discovering the Dots”

Conversations with:

- **Faculty, Staff, Students**
 - Campus Leaders
 - In class
- **Leadership Retreat**
- **Town Hall**

The goal is to engage.

Analyze Existing Data

- Self study, regional, & national data, etc.

Gather Additional Information

- Peers and Competitors

Step 4 (January 2015)

Draft Vision, Mission Goals: “Connecting the Dots”

- Strategic Planning Advisory Committee (SPAC) refines/develops:
 - Core Values, Vision, Mission
 - Strengths
 - Driving Forces
 - Planning Assumptions, including funding
 - What we have to do to achieve Mission and move forward



- SPAC translates “what we must do” into Goal statements.



Example: *“Address workforce changes in the region by adjusting our academic offerings appropriately.”*

Step 4 (January)

Vice President for Administration and Finance estimates revenues from traditional sources, based on historical trends and planning assumptions: enrollment, etc.

- Not yet taking into consideration any special revenue-enhancing efforts that might be included in the new strategic plan



Step 4, cont. (January)

- Second Town Hall and Small Group Discussion
 - Share Vision; Mission; Driving Forces; Planning Assumptions; Goals



Step 5 (Jan.-Feb. 2015)

Formulate Desired Outcomes – “Charting the Course”

- SPAC identifies Desired Outcomes, e.g.
 - *Increase graduate headcount enrollment by 500 students.*
 - *Establish a faculty professional development center.*

Step 5 cont. (March)

- Third Town Hall and Small Group Meetings

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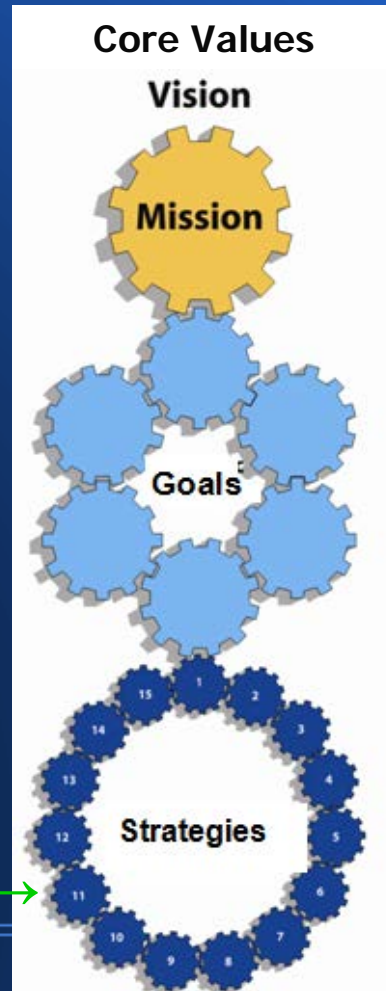
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How will we know when
we have arrived?
Desired Outcomes →

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

Why? What? Examples →



Strategic Position

Inside ⇌ Outside

Step 6 (March-May 2015)

Developing the Strategies: “Setting the Sails”

- SPAC to develop strategies
 - Organized around goals
 - Work across organizational & campus lines
 - Emphasis on “big ideas”
 - Strategies are elaborated expressions of an idea
 - Intro & Background
 - Basic Elements & Description
 - Models

Enhance Staff Development

Introduction and Background

Staff are an integral component to the operations of the institution.

For high-quality staff to be attracted to the university, appropriate attention must be paid to issues related to staff recruitment and retention. This initiative focuses on programs that support the personal and professional development of staff.

This initiative relates most directly to:

- Quality of life for faculty and Staff
- Increased Enrollment and Student Success

Basic Elements and Brief Description

Following are ideas to enhance the development of staff:

- a. Initiate a formal staff training and development program, with courses and learning experiences to enable staff to learn, climb, and better serve students and the entire campus community
- b. Enhance the new staff orientation program to introduce new employees to all aspects of the University
 - Physical layout of the campus through a campus tour
 - Policies and procedures
 - The traditions, culture, and values of the University
 - How they and their families can become involved in the many activities of the University
- c. Provide staff internship / cross-training opportunities to enable staff to learn the skills of other positions
- d. Hold the Staff appreciation event during the academic year when everyone is on campus and can celebrate the accomplishments of staff and their contributions to the teaching/learning process
- e. Provide support – the needed time as well as financial backing – for staff to take classes and pursue degrees or certificates
- f. Make computers available to staff who do not have one as part of their job, so that they can remain informed on campus news and events that, more and more, are being communicated electronically.

Additional information and Potential Models

Miami University Job Enrichment Program: <http://www.units.muohio.edu/prs/staffdevelopment/>

Berea College: <http://www.berea.edu/cltcr/staffdevelopment.asp>

University of Iowa Faculty and Staff Development: <http://www.uiowa.edu/learn>

Step 7 (May 2015)

**Fourth Town Hall in which SPAC
presents proposed strategies**

**All elements of the Strategic Plan
have been presented**

Step 7 cont. (May 2015.)

- SPAC presents final draft plan to the President
- President approves a final Strategic Plan for CSUSB

Celebration!



Small Group Discussions

Guidelines

- **Small Group Discussions (45 min.)**
 - **Select one person to facilitate and report out**
 - **Record thoughts on flip charts in bullet form**
 - **Take up questions in any order you want to**
 - **Circle your top 3 ideas for each question**
- **Large Group Presentation (30-40 min.)**
 - **Facilitators will report answers to questions**
 - **Questions and comments from the floor**

Guidelines

- **Think creatively**
 - This is a “no dumb idea zone”
- **The Vegas rule applies: “What’s said here, stays here”**
- **Rank doesn’t matter**
- **Encourage everyone to talk**
 - Those who are quiet often have a lot to offer
- **No final decisions made today, so no hills to die on**
 - It’s just a conversation among colleagues

Small Group Questions

1. Looking to the years ahead, as if peering into a crystal ball, what do you see as the ideal future for CSUSB?
“CSUSB is.....”
2. You’ve been asked to talk to a small group of individuals who are considering attending CSUSB about the things that they will get here that are truly different from other schools. What do you wish you could say, but can’t?

Small Group Questions (cont.)

- 3. You have the opportunity to talk with donors considering a very large unrestricted gift to CSUSB. What ideas would you pitch to them that build off CSUSB's areas of strength and promise, or that address a need that would be extraordinarily exciting to work on and would better serve students and community (e.g., programs, special initiatives)?**
- 4. What are the traditions, commitments, and places that tie us together and are uniformly held dear by the CSUSB community?**
- 5. What are the major and subtle forces or issues – global, national, regional, and local – that will affect the future of the campus?**

Large Group Presentations-- Final Comments

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