Policy on Strategic Planning

This policy was recommended by the Academic Senate on April 5, 2001 and approved by the President on May 17, 2001.

(This Policy Statement supersedes Policy Statements 97-05 and 97-05 [Rev.])

1.000 Introduction

1.100 Definition: Strategic planning is a process for developing the capabilities of the university to shape and fulfill its mission through the selective application of its internal strengths to external opportunities.

1.200 Goals: Strategic planning processes are intended to lead to greater effectiveness in organizational development; resource allocation; and long-term planning of how the institution will function within the larger intellectual, social, and economic environment. Through the systematic analysis of the institution's current and future opportunities in the context of its historical commitments and current capabilities, strategic planning should produce more informed and successful campus decisions.

1.300 Principles Underlying the Policy on Strategic Planning

a) Strategic planning must be collaboratively developed by, communicated to, and accepted by the working members of the campus community - the administration, faculty, staff, and students. b) Strategic planning must be directly linked to decision making concerning resource allocations; the hiring, training, evaluation, and recognition of personnel; and the setting of priorities among campus programs on an on-going basis. c) Strategic planning must be a continuously visible activity and must be perceived as being supported by the leaders of the campus.

d) Strategic planning must be linked to the people and communities served by the University.

e) Strategic planning must be linked to the assessment of the University's mission-related activities.

f) Strategic planning must be guided by disciplined and consistent processes that are appropriate to the campus culture.

1.400 Actions: There are three major interacting Strategic Planning activities which are governed by this policy. a) The planning activities that serve to organize the people and sources of information, to establish the decision-making processes and communication links, and to allocate the initial resources pre-requisite to effective strategic planning.

b) The strategic planning activities proper that develop and implement traditional strategic planning processes e.g., strategic planning retreats, strategic projects, and monitoring and
accountability processes and outcomes e.g., statements of mission, vision, priorities, core values, goals and objectives, and strategies, action plans, and accountability plans.

c) The management activities that maintain the continuous operation and improvement of pre-planning and planning activities.

2.000 Organization

2.100 The Office of Strategic Planning is headed by a Director appointed by the President for a three-year term after consultation with the Executive Committee of the Academic Senate. 2.110 The Director of Strategic Planning is responsible for facilitating the University's strategic planning activities and reporting on those activities at least annually to the President and to the campus community.

2.111 The Director is responsible for facilitating the activities of the Interdivisional Mid-Range Planning Group (see section 3.200) and integrating their work with the CSULB Mission Statement and Strategic Plan.

2.112 The Director is responsible for facilitating and coordinating the University's participation in the California State University Accountability Process.

2.113 The Director is an ex officio member of the Program Review and Academic Planning Council.

2.120 The Office of Strategic Planning will facilitate the flow of information to the campus community about strategic planning activities; will lead the process of periodically updating the University's statements of Mission, Strategic Priorities, and Strategy (see section 3.200); will promote the integration of the results of strategic planning into the Resource Planning Process; and will facilitate the flow of information about strategic planning between CSULB and the Office of the Chancellor. 2.200 The Interdivisional Mid-Range Planning Group consists of: a) Provost and Senior Vice President for Academic Affairs;

b) Vice President for Administration and Finance;

c) Vice President for Student Services;

d) Vice President for University Relations and Development;

e) Chair of the Academic Senate;

f) Director of Strategic Planning.

Its major responsibilities include the development of mid-range (3-5 year) planning goals pertaining to the University as a whole. These Mid-Range Goals shall serve as a guide to the Resource Planning Process Task Force.

2.300 The Program Review and Academic Planning Council will coordinate activities with the Interdivisional Mid-Range Planning Group; facilitate the appropriate involvement of campus units, the Graduate Council, and the Educational Policies Council in institution-wide strategic planning; disseminate information about strategic planning activities to the campus; and advise the Director of Strategic Planning on the development and improvement of strategic planning processes.
3.000 Procedures

3.100 Each year, the Director of Strategic Planning will present to the President, on or before February 1, a report on campus progress toward the previous year’s Mid-Range Goals and a new set of Mid-Range Goals. Delivery of these reports by February 1 will make it available for use in the Resource Planning Process and will facilitate its integration in divisional planning activities. It is anticipated that the updated Strategic Plan for CSULB will be based on the previous years' strategic plans and activities.

3.110 California State University, Long Beach Strategic Planning prepares a number of documents that articulate with the California State University Chancellor's Office, campus-wide planning activities, and the four divisions of the University. Each of these documents has a specific use and is subject to revision according to a respective calendar. 3.111 California State University Accountability Goals are two- and four-year goals for the campus relative to a set of Cornerstones Accountability Indicators defined by the California State University Chancellor's Office. Accountability Goals are used to define campus goals relative to indicators of importance to the Chancellor and the State of California. Accountability Goals also serve a key input into the development of campus Mid-Range Goals. These Goals are developed on a calendar established by the Chancellor's Office, currently at two-year intervals.

3.112 California State University Accountability Report is a summary of campus progress toward the Cornerstones Accountability Indicators. The Accountability Report is prepared to summarize campus progress toward indicators of importance to the Chancellor and the State of California. The Accountability Report also serves as a key input into the development of campus Mid-Range Goals. The report is prepared on a calendar established by the Chancellor’s Office, currently at two-year intervals.

3.113 California State University, Long Beach Mission is an enduring statement of the broad purposes of the institution that defines the scope within which all campus activities can occur. The Mission exists in order to communicate concisely to internal and external audiences the enduring purpose of the institution. The Mission is revised only rarely, as deemed necessary by the campus.

3.114 California State University, Long Beach Strategic Priorities are a listing of broad areas of emphasis consistent with the Campus Mission. The Priorities exist to communicate concisely to internal and external audiences broad areas of campus emphasis. The Priorities are revised occasionally, as deemed necessary by the campus.

3.115 California State University, Long Beach Mid-Range Goals are specific desired outcomes to be achieved within a three-year planning period that reflect the most vital steps needed to fulfill the campus Mission and Priorities and to attain the campus Accountability Goals. Mid-Range Goals pertain to the entire or a large proportion of the campus and rise to a level of importance to merit the focused attention of the University's top leadership. The Mid-Range Goals are used as the primary but not exclusive framework for the Resource Planning Process Task Force's resource allocation process. Mid-Range Goals also serve to inform planning done within the University divisions, each of which conducts planning in a manner and following a calendar determined by the respective Vice President. Divisional plans serve to inform the establishment of Mid-Range Goals each year and, in turn, Mid-Range Goals serve as a framework for divisional plans and activities. The Mid-Range Goals are updated annually.
California State University, Long Beach Progress Report on Mid-Range Goals describes results attained by the campus in moving toward the Mid-Range Goals established the prior year. The Progress Report is used to track campus attainment of campus Mid-Range goals and to ensure that the planning process remains accountable. The Progress Report is updated annually.

The campus community will be provided with regular opportunities to participate in the process of revising the strategic planning documents and processes, according to the following schedule of activities. At least biennially, the Program Review and Academic Planning Council shall review the status of CSULB's strategic plan and strategic planning processes. The Program Review and Academic Planning Council will determine the scope of the revisions that may be needed in the campus planning documents.

If revisions are deemed necessary, the Program Review and Academic Planning Council will provide the campus community with opportunities to participate in the process of revising the strategic planning documents. Proposed changes shall be submitted to the Academic Senate before being forwarded for approval by the President.

When approved by the President, the revised documents shall be distributed to the campus community for implementation.

**4.000 Strategic Planning within the Divisions**

The responsibility for strategic planning in the Divisions is delegated by the Vice President of each division to the senior administrator of each management unit within their division e.g., Associate Vice Presidents, Assistant Vice Presidents, some Directors, and College Deans. The Vice Presidents will coordinate the strategic planning efforts between the management units within their divisions.

The senior administrator of each management unit will coordinate the strategic planning processes within their unit and will submit their strategic plans for the various programs within their units together with a unit summary to their division Vice President by September 15 of each year. Vice Presidents may then use the results of this process to inform their participation in the formation of Mid-Range Goals.

Program reviews within each division e.g., those conducted by the Program Review and Academic Planning Council, Graduate Council, Division of Student Services’ Program Review Process, will include the review of the program's strategic planning processes and outcomes.

The Vice Presidents will submit their division's strategic plan and a review of their strategic plans for the programs within their divisions to the President by November 15 of each year.

**EFFECTIVE:** Fall 2001