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MEMORANDUM

TO: Alexander Gonzalez, President

FROM: Strategic Planning Council

J. H. H. H., Chair

RE: Annual Report on the Status of *Strategic Plan* Implementation

Implementation of the University's recently approved (December 17, 2007) *Strategic Plan* ultimately is of greater importance than the *Plan* itself. By virtue of the *Plan*, the Strategic Planning Council (SPC) must provide a report in March of each year (beginning in 2008) regarding implementation and achievement of the *Plan's* goals. The initial report has been delayed due to the complexity of the steps involved in structuring it and in part due to the budget discussions that have consumed considerable attention on campus this spring. In addition to the annual report, SPC hopes to provide updates to the campus community approximately every six months or until a formal recommendation on a new plan in March, 2010.

The *Strategic Plan* identifies five prioritized goals that must be pursued via strategic management. In short, senior management must collectively understand and coalesce around the organization-wide goals, the goals must drive organizational resource decisions, and plans must be developed for reaching the goals. Assessment plans naturally flow from this process.

This reporting period, SPC believes the campus should see progress regarding the three initial steps (precursors to assessment of progress) noted above: coalescing around goals, decisions based on goals, and initial plans for reaching the goals. In general, we believe considerable progress has been made on these critical steps. The next sections detail the progress we are observing.

1. Coalescing: Shared understanding and ownership of the *Plan's* goals on the part of senior administration officials.

Community buy-in to a Plan usually begins with buy-in by subset of individuals. Whatever the size of the initial group, its members must articulate their understanding of and demonstrate their commitment to the goals. SPC has observed commitment to the goals in the following:

- A. Your spring, 2008 address to the campus community in which you highlighted the *Strategic Plan* goals and did not “bury” them within a list of priorities.
- B. The placement of a link to the *Strategic Plan* permanently on the campus home page. We hope ultimately to see a common planning page that indicates to the reader the relationship between the *Strategic Plan*, the Destination 2010 initiative, and other planning documents.
- C. The obvious and public collaboration between the Divisions of Academic and Student Affairs in structuring enrollment, retention, and graduation success efforts to accomplish the major priority of the *Plan*.
- D. The Provost’s continual attention to the *Plan’s* goals, especially the first two goals in the prioritized list, in presentations to the Faculty Senate and conversations with the University Deans and Chairs.
- E. The Vice President for Student Affairs’ continual attention to the *Plan’s* goals, especially the first two goals in the prioritized list, in presentations to the various constituent groups on campus.
- F. Efforts by the Division of Administration and Business Affairs, the Division of Information Resources and Technology, and University Enterprises, Inc. to integrate the new *Strategic Plan* directly into their own strategic planning efforts.

2. **Decision making: Resource, structure and process decisions are focused on achievement of the goals identified in the *Strategic Plan*.**

Even in the absence of a formal plan for achieving our strategic planning goals, there is evidence that decisions are being made with those goals in mind. SPC has observed the following:

- A. Evidence that cabinet-level discussions of the budget are focused on achievement of the strategic goals, especially in this difficult budget environment. The vice presidents’ public recognition during recent budget scenario planning sessions of the importance of attainment of the *Plan’s* enrollment and retention goals and their link to the financial health of the Division of Student Affairs was an important statement about priorities to the campus community.
- B. Use of the *Strategic Plan* by the University Budget Advisory Council (UBAC) in formulating its recommendations concerning next year’s budget, joint discussions and the promise of continued meetings between UBAC and SPC.
- C. Considerable anecdotal evidence to indicate a significant decline in unit-focused budget discussions concurrent with an increase in goal-focused budget discussions among members of the University community who do not stand to “gain” from this shift in approach. This has been especially apparent in discussions within the Faculty Senate and campus budget-related discussion sessions hosted by the Provost.
- D. The Provost’s stated intention to earmark funding in the current and next two budgets for systematic attention to advising and retention efforts.

- E. In line with Goal 1, initiation of cross-divisional enrollment planning and retention work groups and a University Committee to plan for implementation of the campus's new Advising Policy.
- F. In line with Goal 2, initiation of the Provost's Assessment Advisory Committee, appointment of an Assessment Coordinator, creation of an Office of Academic Program Assessment, and the allocation of funding to and the direct involvement by the Deans and Chairs in moving forward the University's assessment efforts.
- G. Strong outcomes-assessment efforts across all units within the Division of Student Affairs.

What is important now is development of a single point of accountability (with the accompanying authority delegated by you) for achieving each of the goals. While overall responsibility for implementation of the *Plan* obviously rests with the President, day-to-day decision making and long-term planning should be clearly part of someone's portfolio of duties. We would hope to see a cabinet member (at most two) assigned responsibility for each of the *Plan's* goals before the end of the spring term.

3. Planning: Development of detailed plans for accomplishing goals.

Under the direction of the responsible cabinet member or members, significant progress toward achieving campus goals will rest upon a clearer detailing of exactly where we want to be as a university and the steps necessary for getting there. The *Strategic Plan* identifies the high priority areas of focus. Those goals articulated in the *Plan* now must be transformed into more concrete visions of the future with accompanying short-, medium-, and long-term plans. The plans should be developed by the lead cabinet member or members for each goal, presumably in conjunction with a campus team that is, in line with the *Plan's* recommendations regarding implementation, cross-divisional in nature. Further in line with the *Plan's* recommendations, the implementation process should routinely provide opportunities for feedback from the campus community.

We would anticipate that implementation plans will be completed and made available to SPC by late August, 2008, so that they could be integrated into campus budget-related and other important discussions beginning immediately in the fall semester. Upon receipt of the more detailed plans, SPC stands ready to assist in the development of appropriate benchmarks to assess progress in implementation of the *Plan*. SPC would hope to issue an update on progress in implementation of the *Strategic Plan*, including commentary on initial efforts at benchmarking, in November, 2008.

Thank you for your attention and your encouragement of the University's strategic planning process.

c. SPC members