San Francisco State University
We Make Great Things Happen
Agenda

- **SPC Introductions** *(20 mins)*
  - Strategic Planning Committee

- **Welcome** *(15 mins)*
  - Lynn Mahoney, President, Chair, Strategic Planning Committee

- **Kicking off Strategic Planning at SFSU** *(50 mins)*
  - Blue Beyond Team introductions
  - Strategic Planning Process
  - Role of Strategic Planning Committee (SPC)
  - Proposed Engagement Plan

- **Get in Touch** *(5 mins)*
Strategic Planning Committee Members

Lynn Mahoney
University President, Chair

Alaric Trousdale
Staff, Student Affairs & Enrollment

Barbara Stein
Staff, University Advancement

Drashti Shah
Undergraduate student representative

Dylan Mooney
Staff Council representative

Fatimah Ogunmowo
President, Associated Students Designee

Fred Smith
AVP, Equity & Community Inclusion

Grace Yoo
Faculty, College of Ethnic Studies

Ingrid Williams
AVP, HR

Jamillah Moore
VP for Student Affairs and Enrollment Management

Janet Remolona
Staff, Academic Affairs

Janice Gumas
Alumni representative

Jason Porth
VP for University Enterprises

Jeff Jackanicz
VP for University Advancement

Jeff Wilson
VP for Administration & Finance

Jennifer Summit
Provost and VP for Academic Affairs

Julie Briden
College of Extended Learning representative

Kate Hamel
Faculty, College of Health and Social Sciences

Katie Lynch
AVP, Enrollment Management

Kendra Van Cleave
Faculty University Library

Kym Morrison
Faculty, College of Liberal and Creative Arts

Lori Beth Way
Dean, DUEAP

Maria Del Rosario Zavala
Faculty, Graduate College of Education

Michael Goldman
Faculty, College of Science and Engineering

Michael Scott
AVP for Research and Sponsored Programs

Michelle Martinez
Staff, Administration & Finance

Nayeli Parra
Associated Students Board of Directors representative

Olivia Eva Vallejo
Graduate student representative

Rozan Soleimani
Staff, University Enterprises

Sepideh Modrek
Faculty, Lam Family College of Business

Sophie Clavier
Dean of Graduate Students

Sutee Sujitparapitaya
Associate Provost, Institutional Analytics

Teddy Albiniak
Chair, Academic Senate

Staff Support:
Bobby King
Director of Communications, Office of the President

Luis De Paz Fernandez
Executive Assistant, Office of the President
Strategic Planning Committee Introductions

Introduce yourself in 30 seconds by sharing:

- Your name
- Your role and how long you've worked or been at SFSU
- One word that reflects how you feel as we begin the strategic planning journey
Welcome

University Update → Strategic Planning Process Vision → Future State
Kicking off Strategic Planning at San Francisco State University
Introduction to Blue Beyond

• Management consulting firm specializing in strategy and planning, culture, change, organizational effectiveness, leadership, employee engagement, DEI, communications

• 80+ full-time team members, headquartered in the Bay Area with hubs in Southern California, the Northeast, and the Midwest

• University clients in CA have included: SJSU, CSULA, Cal Poly SLO, UCSF, UCSC, UC Berkeley, USC

SFSU Strategic Planning Team:

Mariah Cherniss
Head of Consulting Excellence

Kristal Smart
Consultant

Caitlin Ross
Account Lead
Strategic Planning Core Beliefs

• The strategic planning **process** is just as important as the final “**deliverable**”

• Deep and broad **listening** is essential to truly understand the perspectives of all stakeholders

• Diversity, equity and **inclusion** and **cross-boundary collaboration** are critical principles to be embedded throughout the planning process

• Creative, interactive, and **visual techniques** help draw out and illuminate important stakeholder insights

• The **role of the SPC is critical** – to invite and engage critical stakeholders, to interpret and represent all perspectives gathered, and to develop a strategic plan the SFSU community will broadly support

• This process we will contribute to creating a **lasting organizational culture** that ensures aligned planning and accountability
Guiding principles

• Ensure the strategic planning process is comprehensive and inclusive

• Create numerous opportunities for deep listening and engagement

• Hone in on the “big rocks” – not a long “to do” list

• Make the plan a living document – adjust as needed based on changing circumstances

Key Plan Deliverables

• Clear mission

• Compelling vision

• Aligned values

• 4-6 strategic priority areas
Strategic Planning Process

**PHASE 1**
**Preparation and Planning**

September – October

- Form the Strategic Planning Committee
- Gather essential background context and internal/external data
- Conduct preliminary background interviews to get perspectives on current state and input on the process
- Clarify process and outcomes

**PHASE 2**
**Engagement, Information Gathering & Analysis**

November - March

- Strategic Planning Committee reviews and refines engagement plan
- Gather input from campus stakeholders – including students, faculty, staff, alumni, and other key community members via workshops, focus groups, surveys and web-based comment box

**PHASE 3**
**Develop and Finalize the Plan**

March – May

- The Strategic Planning Committee develops the strategic plan
- Host follow-up sessions with campus stakeholders to review and vet the draft plan
- Finalize the plan

**PHASE 4**
**Plan Implementation**

August

- Present final plan to all key stakeholder groups
- Ensure the governance and organizational structures and processes are in place for effective plan implementation
Strategic Planning Committee

Role:
Develop a strategic plan broadly supported by the SFSU community that will propel the success of the university over the next 5-10 years.

Core Responsibilities:
- Serve as a liaison with constituents you represent – particularly those whose voices are underrepresented
- Understand the perspectives of various stakeholders across our SFSU community and help ensure broad participation and engagement
- Incorporate the input and perspectives from all campus stakeholders, and solicit input and feedback as the plan is drafted
- Review and evolve the SFSU mission, vision and values
- Determine a focused set of university priorities for the next 5-10 years along with tangible goals and measures of success
- Provide consultation around governance and organizational structures, policies, processes, etc. in order to support successful plan implementation

Blue Beyond’s Role:
- Help organize and facilitate the overall process
- Compile input and summarize findings/insights for SPC review (we will also provide access to raw data)
- Prepare materials and help facilitate the main engagement sessions (e.g., workshops and focus groups)
- Partner with the SPC to design and implement the student and faculty/staff surveys, and analyze results
- Prepare for and facilitate the SPC meetings
- Act as the "pen" of the SPC - document the decisions of the SPC into a written strategic plan document and design the final deliverable
Strategic Planning Committee Activities and Logistics

SPC Meetings (Nov – May):
• Participate in regular SPC meetings – monthly to start, increasing to bi-weekly during plan development (on Fridays)

Activities for SPC members:

PHASE 2
Engagement, Info. Gathering & Analysis
November - March
• Reach out to invite constituents you represent (particularly underrepresented) to participate in engagement events
• Participate in engagement activities with a focus on deep listening to understand all stakeholder perspectives
• Help facilitate focus groups (with the support of resources/tools)

PHASE 3
Develop and Finalize the Plan
March - May
• Review stakeholder inputs
• Work with SPC colleagues to outline plan (including updating SFSU mission, vision and values, and developing university priority areas)
• Help to engage campus community for feedback on draft plan

PHASE 4
Plan Implementation
August
• Once priority areas are identified, participate in small groups to outline example goals and initiatives (goals and metrics will be solidified in fall 2022).

• Support to socialize and drive engagement around the plan
Work Completed to Date: Phase 1
Phase 1 – Activities

1. Gathered background input from SPC members (through interviews and survey)
2. Reviewed other background materials

**SPC Background Input – What We Asked**
- What excites you about the strategic planning opportunity?
- What opportunities do you see for the University as you look ahead 5-10 years?
- Who we need to be sure to include in the process?
- What do we need to be aware of / thoughtful about to ensure success (any watch-outs / hot button issues)?
- What advice would you give to ensure this process is successful?

**Other Background We Reviewed**
- Demographic data about SFSU students, faculty and staff
- Past and alumni student surveys
- Prior strategic plans
- Academic Master Plan
- Strategic Marketing Plan
What excites you about this strategic planning opportunity?

- Aligning across the campus around one plan and set of priorities (feeling of disconnected "islands" today)
- Collectively defining our identity, shaping our vision of as we emerge from the pandemic, and focusing our mission (i.e. to address “mission creep”)
- Identifying how we can better support our students in meaningful and sustainable ways
- Building community and connections, and enabling collaboration across campus groups (getting out of our silos)
- Uniting the many planning processes currently underway (SEMP, AMP, WASC, SMC)
- Helping all members of SFSU’s community understand how their role supports our mission

What opportunities do you see for the University as you look ahead 5-10 years?

- Increasing enrollment to serve more students
- Addressing roadblocks to student success to increase graduation and retention rates
- Differentiating ourselves and what we’re known for (to prospective students, our community, etc.)
- Enabling a more seamless and connected student experience (versus lots of disconnected experiences)
- Identifying what social justice means and looks like in practice and in relation to our mission
- Attracting more top talent, and increasing morale among staff to ensure they feel valued
- Creating a path where we can balance flexibility and engagement for students, faculty, and staff
- Establishing more integrated, repeatable, documented processes and ways of working across the campus
**SPC Background Input – Key Insights**

**Who we need to be sure to include in the process?**
- Everyday student voices on campus that represent the diversity of our SFSU community (*incl. “non-titled” students*)
- Alumni – including staff
- Staff across all levels – including MPPs, facilities staff, front desk staff and others at the “front lines” of student experience
- All faculty including non-tenure track faculty and across all colleges
- Influential off-campus community stakeholders (*e.g. Bay Area Council, Chamber or Commerce, local elected officials, and major employers of SFSU students*)
- Members of our broader community (*incl. prospective students and those who chose not to apply*)

**What do we need to be aware of / thoughtful about to ensure success (any watch-outs / hot button issues)?**
- Process needs to be truly inclusive – we need to make space for and listen to all voices (*not just the stronger advocates, who might not represent broad student body*)
- Need to energize and encourage participation of those who might not usually get involved
- Balance interests – we need to zoom out to find the biggest common goals (*“us” versus “me”*)
- Burnout is widely felt – we need to be sensitive to this in our process
- Skepticism/concerns that the plan will “sit on a shelf”

**What advice would you give to ensure this process is successful?**
- Process is everything! There should be opportunities for every member of campus to be involved
- Be sure to engage the “quieter voices” and be mindful of individual perspectives
- We should reflect the future we seek to create through this process (*e.g., opportunities for people to see/hear one another, collaborate, focus on solutions versus problems etc.*)
Engagement Approach
Engagement Approach

Key insights informing our recommendations on stakeholder engagement

• Some bring “louder” voices than others, so it will be important that we are intentionally engaging unrepresented voices

• To break down silos, it will be critical that stakeholders from different groups hear directly from one another and build shared understanding of common goals

• It’s important to model the culture we seek to create – one that is centered in collaboration and community

Proposed approach

• Targeted invitations to activate and engage critical and potentially underrepresented voices

• Open call events with representation from all key stakeholder groups (students, staff, faculty, alumni, external community stakeholders)

• Mix of in-person and virtual sessions

• Sessions designed to promote cross-boundary deep listening and collaboration (to allow stakeholders to hear each other and build alignment around a common vision and goals)
Proposed High-Level Engagement Plan and Timeline

Ways we’ll invite stakeholders to provide input:
• Highly interactive and collaborative **workshops**
• **Focus groups** to enable deep listening around particular topics
• **Surveys** focused on student, faculty and staff experiences and perspectives
• Online **comment box** for questions, feedback and input

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<th>Number of Sessions</th>
<th>Total Participants</th>
<th>Timeframe</th>
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<td>January - March</td>
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<tr>
<td>Workshops (in person) ~2-3 hrs</td>
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<tr>
<td>Staff and Faculty survey</td>
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<td>All staff and faculty</td>
<td>February/March (TBC)</td>
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*Option to add additional focus groups that SPC facilitate

** In partnership with Student Enrollment
Proposed High-Level Engagement Plan and Timeline

Key asks of SPC (for discussion):

- **Targeted invites and outreach** to key/underrepresented constituents *(Blue Beyond to work with SPC to identify which key groups they can engage, and support with messaging)*

- **Volunteers to host/facilitate additional focus groups** *(Blue Beyond to support with facilitation toolkit and materials)*

- Participate in at least 1-2 workshops

- Provide input on survey topics
Strategic Planning:

Strategic Planning Process
San Francisco State University is embarking on a strategic planning process. This effort, which will begin fall 2021 and carry through early summer 2022, will involve input and perspectives from across our entire campus community.

Strategic Planning Approach
Our goal through this process is to develop a strategic plan that reflects the perspectives from everyone who has an important stake in our campus — including our students, faculty, staff, alumni, and other key community members. To accomplish this, we intend to create numerous opportunities for deep listening and to advance engagement through the course of the strategic planning process. Plan the block updates; opportunities to begin feedback; please see the Opportunities for Involvement menu. We will also follow closely with data, qualitative and quantitative, including, but not limited to, existing survey data, the Academic Master Plan, the Strategic Enrollment Management Plan, the Strategic Marketing Plan and the WASC self-study.

The strategic planning process will launch in fall 2021 and conclude in summer 2022.

Strategic Planning Timeline

Preparation and Planning
September - October
- Join the Strategic Planning Committee
- Gather essential background context and data
- Conduct preliminary feedback interviews to get perspectives on current state and input on the process
- Clarify goals and outcomes

Engagement, Info. Gathering and Analysis
November - March
- Strategic Planning Committee reviews and refines engagement plan
- Gather input from key campus stakeholders — including students, faculty, staff, alumni, and other key community members via workshops, focus groups, surveys and web-based comment box

Develop and Finalize the Plan
March - July
- The Strategic Planning Committee develops the strategic plan
- Meet with key stakeholders to review and set the draft plan
- Finalize the plan

Plan Implementation
August
- Present final plan to key stakeholders
- Ensure the governance and organizational structures and processes are in place for effective plan implementation

Opportunities for Involvement
During fall 2021 and through early spring 2022, there will be numerous opportunities for all members of the SF State campus community to participate in the strategic planning process — through workshops, focus groups, surveys, and online comments. At this time, all sessions are planned as virtual engagements and planning for any in-person sessions will be guided by our COVID-19 regulations and public health measures.

Quick Links
Office of the President
Institutional Accreditation

Questions and Feedback
Your feedback throughout the strategic planning process is vital to our success. If you have any questions, comments or suggestions that you feel will be helpful to the strategic planning process, please let us know.
Contact Us
Questions, feedback, support

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