EAB Dynamic Strategy Self-Assessment (2022)
How the Best Institutions Stay Agile and Hardwire Self-Sustaining Goal Achievement

Strategy formation, **strategic planning**, and writing the **strategic plan** are separate activities, with different analytical inputs and output deliverables. Blur their boundaries, and you're at risk of misallocating strategy team effort, and producing ineffectual plans that don't translate to action.

Mission	Strategy	Strategic Planning	Strategic Plan
Emotional logic: Why do we do what we do; why we come to work	Economic logic: What customers to serve (and not), through which academic offerings and support services	Economic logic: Multiyear budgets, delivery milestones, and accountability measures	Emotional logic: Affirms institutional values and traditions by highlighting next-decade initiatives
The reason the institution exists—the people we benefit and the good we do	Roadmap laying out where to compete and how to succeed	Detailed project plans translating strategic intent into action	Public document presenting upbeat goals to prospective students, boards, and donors
Aspirational and timeless—doesn't refer to current market conditions Doesn't need to be unique; many institutions have similar-sounding missions	Need not be aspirational, but must be distinctive Explains how we are *unlike* others, and how comparative advantages will enable us to outperform competitors	Prosaic, visible, trackable, and consequential to front-line units Highly institution-specific and granular, to the point they might not make sense to outsiders	Aspirational, but contemporary—reflects decade ahead Need for "consensus language" leads to anodyne goals that sound identical to competitors Not the right forum for explaining complex priority choices or resource trade-offs

From Mission to Strategic Plan

CSUCI Mission	Strategy	Strategic Planning	Strategic Plan
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CSUCI Strategic Planning Processes

1. Bridging 2015 and 2018-23 strategic planning efforts (Sue)
2. Bringing 2018-23 strategic initiatives to a close (Kaia)
    a. What did we accomplish? (sample [divisional reporting sheet](#)—high-level)
    b. What did we learn?
    c. How are we assessing costs and benefits/impacts?
    d. When and how are we closing SI 2018-23 out and communicating with campus?
3. Clarifying CSUCI identity and value proposition (John, Nancy, ADV)
4. **Identifying new <u>strategic initiatives</u>, <u>strategies</u>, <u>goals</u>, and <u>measurable objectives</u> (Cabinet, Campus), from the following:**
    a. **TPR themes**
        i. **Team 1: Academic Quality and Infrastructure:** Block Scheduling, Learning Communities, DFW and Equity Gaps, CIMAS, COC.
        ii. **Team 2: Wrap-around Student Services.** Road Maps, Degree Planner, Channel Your Success, Basic Needs, Transfer Success.
        iii. **Team 3: DEIA.** PACIE, IEAP, Ethnic Studies, Seal of Excelencia.
    b. **Strategic Planning for the Growth, Evolution, and Development of CI through 2032 (Rich/Kaia notes 8/02/2022)**
        i. **Institutional Identity**
            1. Is our university mission unique enough, focused enough, and bold enough to: (1) ensure "servingness" (e.g., our region, our MSI status), (2) make us distinctive, (3) help us to achieve our enrollment goals, (4) guide our collective work through the next ten years?
                a. Integrated Communication Marketing Plan (i.e., branding, community perception findings, web refresh)
                b. Charting Our Course
            2. What do philanthropic priorities and patterns indicate/suggest about the degree to which and the ways in which we are realizing our mission?
                a. Data-informed philanthropy
            3. What will we learn and what new goals will emerge through our experience with Thematic Pathway Review and accreditation processes through 2024?
        ii. **Enrollment Management and Academic Excellence**
            1. What are our enrollment targets by 2032? Overall? Undergraduate, graduate?
            2. What are our academic offerings? Undergraduate, graduate?
                a. Charting Our Course
            3. Which programs are offered stateside and via self-support?
            4. What are our graduation rates?
                a. GI2025
            5. What are our post-graduate outcomes?
            6. How do we strategically allocate resources through a multi-year budget plan?
            7. What are the challenges and possibilities of a multi-year, integrated budget plan, and how would such a plan impact enrollment management processes?

   8. How must we build out the physical campus to meet enrollment goals and needs for the next decade?
    a. Campus Master Plan
 iii. Campus Culture
   1. What does it mean and what will it take to develop a campus culture that is:
    a. DEI-competent?
     i. IEAP
     ii. Campus Climate Survey
     iii. Affinity Groups
    b. data-competent?
    c. communication-competent?
    d. conflict-competent?
     i. Campus Climate Survey
    e. outward-mindset competent?
    f. [sustainability](#) competent?
   2. What is shared governance, why does it matter, and how do we assess it?
   3. How do we most effectively retain and help our faculty and staff to thrive at CI?

c. Enrollment Report 2/01/2023
 i. Immediate Strategies in Enrollment Management
  1. Restructuring of Enrollment Management Department
  2. Collaboration Between Admissions, Recruitment, and Institutional Research
  3. Competitor Analysis – Other CSUs and UCs
  4. Dual Admissions: CSUCI's Enhanced Transfer Success Pathway Program
 ii. Immediate Strategies: Integrated Communication and Marketing Plan
 iii. Immediate Strategies: Improving Student Retention and Persistence
  1. Leveraging Philanthropic Support to Address Our Greatest Needs
  2. Cross Divisional Partnerships/Collaborations in Student Success
  3. GI 2025 and Additional Student Success Initiatives
  4. Expanded Learning Communities
  5. New Student Onboarding
  6. CSUCI Initiative for Mapping Academic Success (CIMAS)
  7. Degree Planner
  8. Holistic Student Supports
 iv. Immediate Strategies: Improving Campus Climate
 v. Intermediate and Long-term Planning
  1. Academic Master Plan
  2. WASC Thematic Pathway for Reaffirmation
  3. Internship Expansion
  4. Executive Director of Regional Educational Partnerships
  5. Capital Projects

CSUCI 2023-2026
KT Synthesis: Strategic Priorities and Existing Strategies/Initiatives

Strategic Initiative 1 **Design and communicate a compelling campus and academic identity. TPR Theme 1: Academic quality and infrastructure** DAA Lead with All	Strategic Initiative 2 **Create a vibrant and engaging campus culture for students.** **TPR Theme 2: Wrap-around student services** DSA Lead with All	Strategic Initiative 3 **Operationalize the values of diversity, equity, inclusivity, and accessibility.** **TPR Theme 3: DEIA** OTP Lead with All	Strategic Initiative 4 **Manage and enhance campus resources sustainably and effectively.** BFA and DUA Lead with All
Strategy 1a: Charting Our Course	**Strategy 2a:** Student Marketing Center	**Strategy 3a:** Inclusive Excellence Action Plan (IEAP)	**Strategy 4a:** CSUCI Climate and Sustainability Plan
Strategy 1b: Academic Master Plan	**Strategy 2b:** Affinity Centers	**Strategy 3b:** Equity Lens Framework (ELF) and DEIA Dashboard	**Strategy 4b:** Cross-Divisional Efficiencies & Innovations
Strategy 1c: Enrollment Management Plan	**Strategy 2c:** Student Retention and Persistence: New-Student Onboarding	**Strategy 3c:** Campus Climate Surveys	**Strategy 4c:** Leverage Philanthropic Success
Strategy 1d: Integrated Communication Marketing Plan	**Strategy 2d:** Student Retention and Persistence: Holistic Student Supports: CAPS, CARE, Dolphin Pantry	**Strategy 3d:** CSU Racial Equity Leadership Alliance	**Strategy 4d:** Student Retention and Persistence: Internship Expansion
Strategy 1e: Dual Admissions TSP	**Strategy 2e:** Student Retention and Persistence: Student life and "the college experience"	**Strategy 3e:** Black Excellence Project	**Strategy 4e:** Capital Projects
Strategy 1f: Student Retention and Persistence: Expanded Learning Communities			**Strategy 4f:** Regional Educational Partnerships Office
Strategy 1g: Student Retention and Persistence: GI-2025 Expanded Student Success Initiatives			
Strategy 1h: Student Retention and Persistence: CSUCI Initiative for Mapping Student Success (CIMAS)			
Strategy 1i: Student Retention and Persistence: Degree Planner			