

# Annual Strategic Plan and Program Review Report

2019/2020

Strategic Plan &  
Review of Business Functions

Department



**Division of Student Affairs  
California State University San Marcos**

## READ THIS FIRST

There are three ways to fill in this form.

- You may download the form and edit in Adobe and save.
- You may edit in your browser and print to a pdf. **Note: Changes typed in a browser will not save if you download the form after editing. You must print to a pdf file to save your work.**
- You may print the report, fill it out by hand, and scan it.

### Step-by-step Guide

1. Review the strategic planning and program review process.
2. Update and your strategic planning goals, objectives, and tactics.
3. Prepare your program review proposal.
4. Review both with your area's AVP.
5. By August 15<sup>th</sup>, submit the information on pages 3–13 of this report to [papd@csusm.edu](mailto:papd@csusm.edu).

PAUSE ON PAGE 14 UNTIL THE END OF THE ACADEMIC YEAR

6. Reflect on your progress over the year for both your strategic plan and your program review.
7. Discuss your progress and action items with your area's AVP.
8. By July 15<sup>th</sup>, submit your summative report information on pages 15–23 to [papd@csusm.edu](mailto:papd@csusm.edu).

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### REPORT: Strategic Plan and Program Review

Strategic planning and program review are distinctly separate processes. Strategic planning informs future departmental activities while program review evaluates the structure and impact of current practices. Between the two however, there are some relationships that exist between phases of the process. For our purposes, and to simplify the process, the reporting for both will be combined.

#### Select Your Department

##### Athletics

Athletics

##### Planning, Assessment & Professional Development

PAPD

##### Enrollment Management Services

Admissions

Commencement

Financial Aid & Scholarships

Recruitment & Outreach

Registrar

##### Student Academic Support Services

ACE Scholars Services

CAMP

Career Center

DREAMer Resource Office

Educational Opportunity Program

PASO

Project Rebound

Readiness & Success Services

TRIO/SSS

Veterans Services

##### Student Development Services

Dean of Students

Disability Support Services

New Student & Family Programs

Residential Education

Student Health & Counseling Services

DHR/Title IX

Project Rebound

Readiness & Success Services

##### Student Life

Associated Students, Inc.

Black Student Center

Campus Recreation

Cross Cultural Center

Gender Equity Center

Latin@ Center

LGBTQA Pride Center

Student Life & Leadership

University Student Union

#### Contact Information

Strategic Plan Contact Person

Email

Program Review Contact Person  
(if different than above)

Email

#### I would like to schedule a PAPD consultation for:

Strategic Planning

Program Review

Neither, we're all set!

## Mission Statement

## Goals, Objectives & Tactics

**Goals:** These should align with your department’s mission statement and identify overarching areas of focus. They are intended to be long-term and should change little or not at all over the course of the three-year cycle.

**Objectives:** These are short-term outcomes that ideally can be reached within one year that advance your progress toward your goals.

**Tactics:** These are your internal action-oriented items that serve as your “to-do” list to accomplish your objectives.

NOTE: There is no minimum number of goals, objectives, or tactics. We leave space for three goals with five objectives each on the form but there is no requirement that you fill them all.

## Strategic Planning Process



## Goal 1

Align with the following Priorities & Strategies (check all that apply) [Refer to the strategic planning website for full details.](#)

1. Promote Holistic Student Development

1.1      1.2      1.3

2. Facilitate Graduation & Readiness for Lifelong Success

2.1      2.2      2.3      2.4

3. Pursue Educational Equity

3.1      3.2      3.3      3.4      3.5

4. Exemplify Principles of a Learning Organization

4.1      4.2      4.3      4.4      4.5      4.6

### Objective 1.1

**Tactics** (list all)

### Objective 1.2

**Tactics** (list all)

**Objective 1.3**

**Tactics** (list all)

**Objective 1.4**

**Tactics** (list all)

**Objective 1.5**

**Tactics** (list all)

## Goal 2

Align with the following Priorities & Strategies (check all that apply) [Refer to the strategic planning website for full details.](#)

1. Promote Holistic Student Development

- 1.1
- 1.2
- 1.3

2. Facilitate Graduation & Readiness for Lifelong Success

- 2.1
- 2.2
- 2.3
- 2.4

3. Pursue Educational Equity

- 3.1
- 3.2
- 3.3
- 3.4
- 3.5

4. Exemplify Principles of a Learning Organization

- 4.1
- 4.2
- 4.3
- 4.4
- 4.5
- 4.6

### Objective 2.1

**Tactics** (list all)

### Objective 2.2

**Tactics** (list all)

**Objective 2.3**

**Tactics** (list all)

**Objective 2.4**

**Tactics** (list all)

**Objective 2.5**

**Tactics** (list all)



## Strategic Plan: Goal Three

### Goal 3

Align with the following Priorities & Strategies (check all that apply) [Refer to the strategic planning website for full details.](#)

1. Promote Holistic Student Development

1.1      1.2      1.3

2. Facilitate Graduation & Readiness for Lifelong Success

2.1      2.2      2.3      2.4

3. Pursue Educational Equity

3.1      3.2      3.3      3.4      3.5

4. Exemplify Principles of a Learning Organization

4.1      4.2      4.3      4.4      4.5      4.6

#### Objective 3.1

**Tactics** (list all)

#### Objective 3.2

**Tactics** (list all)

**Objective 3.3**

**Tactics** (list all)

**Objective 3.4**

**Tactics** (list all)

**Objective 3.5**

**Tactics** (list all)

## Goal 4

Align with the following Priorities & Strategies (check all that apply) [Refer to the strategic planning website for full details.](#)

1. Promote Holistic Student Development

- 1.1
- 1.2
- 1.3

2. Facilitate Graduation & Readiness for Lifelong Success

- 2.1
- 2.2
- 2.3
- 2.4

3. Pursue Educational Equity

- 3.1
- 3.2
- 3.3
- 3.4
- 3.5

4. Exemplify Principles of a Learning Organization

- 4.1
- 4.2
- 4.3
- 4.4
- 4.5
- 4.6

### Objective 4.1

**Tactics** (list all)

### Objective 4.2

**Tactics** (list all)

**Objective 4.3**

**Tactics** (list all)

**Objective 4.4**

**Tactics** (list all)

**Objective 4.5**

**Tactics** (list all)

## Program Review: Proposal

### Cycle Year

#### Year One: Business Functions

During this year of the division's program review cycle, each department will conduct a thorough evaluation of its business functions. Business functions refer to the organization's operations and how they are executed. Begin to prepare the materials you will need to review the following components of your department. Upon receipt of your proposal, PAPD will provide you with the CAS Self-Assessment Guide appropriate to your area to help guide your review process.

- |   |   |   |
|---|---|---|
| <ul style="list-style-type: none"> <li>• Mission, Vision, and Values</li> <li>• Compliance</li> </ul> | <ul style="list-style-type: none"> <li>• Internal Policies</li> <li>• Organizational Structure</li> </ul> | <ul style="list-style-type: none"> <li>• Financial Resources</li> <li>• Promotional</li> <li>• Workload &amp; Compensation</li> </ul> |
|---|---|---|

### Review Committee

Committee Chair

Email

Additional Internal Reviewers  
(if applicable)

Undergraduate Student\*

Email

GA's or Additional Students  
(if applicable)

External Reviewer\*\*

Email

External Reviewer Title  
and Organization

\* If you have not identified your student yet, you may submit the form now and provide an update to [papd@csusm.edu](mailto:papd@csusm.edu) with the student's name/email.

\*\* If you are having trouble identifying an external reviewer, email [papd@csusm.edu](mailto:papd@csusm.edu). We have a list of volunteers who have attended a review training.

### External Benchmarking

#### OPTIONAL

In addition to the CAS Self-Assessment Guide (provided by PAPD upon proposal submission), do you intend to use any additional external benchmarking methods?

Site Visits

Interviews

Consultants

Literature Review

Other

### Timeline & Approval

Once you have submitted your proposal, the timeline for completing your review is up to your department. PAPD will reach out for a status update in mid-spring as we gear up again for strategic plan updates. Your program review progress should help inform your new goals/objectives. Upon receipt of your proposal, someone from PAPD will reach out about joining your first committee meeting as a consultant.

I acknowledge that our department has discussed the content in this strategic plan and program review proposal with our area's AVP.

# PAUSE HERE

You have completed the first section of your report.

Save this file and submit it to [papd@csusm.edu](mailto:papd@csusm.edu).

Thank you!

Pages 14–23 will be due at the end of the upcoming academic year.

## Strategic Plan Updates

End of 2019-2020 Summative Update

In the section below, please provide your evaluation of progress in achieving your strategic objective last year. Be sure to address any lessons learned, and how the results will be implemented in your programs or services. Make reference to your method of assessing your outcomes and the assessment results where appropriate.

### Goal One

**Please provide a progress update.**

Which objectives were met? Which were not and what hindered that progress? Has anything else changed?

### Goal Two

**Please provide a progress update.**

Which objectives were met? Which were not and what hindered that progress? Has anything else changed?

## Goal Three

**Please provide a progress update.**

Which objectives were met? Which were not and what hindered that progress? Has anything else changed?

## Goal Four

**Please provide a progress update.**

Which objectives were met? Which were not and what hindered that progress? Has anything else changed?

## Additional Information

Is there anything else you would like to share about last year's process?



## Summative Report | Year One: Business Functions

Please submit the external benchmarking sources (outside of CAS Self-Assessment Guides), findings, and action plan item(s) for each business functions component that resulted from the work of your program review committee.

### **Mission, Vision, Values**

Provide your organization's current mission, vision, and values.

OPTIONAL: Please check any additional sources used to provide external benchmark information for this component.

Site Visits

Interviews

Consultants

Literature Review

Other

What were the findings related to your department's mission, vision, and values?

What action item(s) resulted from these findings?

By when do you anticipate completing the action item(s) listed above?

**Compliance**

With which laws, grants, etc. must your department comply?

OPTIONAL: Please check any additional sources used to provide external benchmark information for this component.

Site Visits

Interviews

Consultants

Literature Review

Other

What were the findings related to your department's compliance?

What action item(s) resulted from these findings?

By when do you anticipate completing the action item(s) listed above?

**Internal Policies and Guidelines**

Do you have the proper policies and guidelines in place? Are they well-defined and aligned with your mission?

OPTIONAL: Please check any additional sources used to provide external benchmark information for this component.

Site Visits

Interviews

Consultants

Literature Review

Other

What were the findings related to your department's internal policies and guidelines?

What action item(s) resulted from these findings?

By when do you anticipate completing the action item(s) listed above?

**Organizational Structure**

Describe your current organizational structure.

OPTIONAL: Please check any additional sources used to provide external benchmark information for this component.

Site Visits

Interviews

Consultants

Literature Review

Other

What were the findings related to your department's organizational structure?

What action item(s) resulted from these findings?

By when do you anticipate completing the action item(s) listed above?

## Program Review: Summative Report

### Financial Resources

From where does your department receive its funding and does the use of those funds align with your mission?

OPTIONAL: Please check any additional sources used to provide external benchmark information for this component.

Site Visits

Interviews

Consultants

Literature Review

Other

What were the findings related to your department's financial resources?

What action item(s) resulted from these findings?

By when do you anticipate completing the action item(s) listed above?

## Program Review: Summative Report

### Promotional

What does your department currently do to promote your programs and/or services?

OPTIONAL: Please check any additional sources used to provide external benchmark information for this component.

Site Visits

Interviews

Consultants

Literature Review

Other

What were the findings related to your department's promotional efforts?

What action item(s) resulted from these findings?

By when do you anticipate completing the action item(s) listed above?

## Program Review: Summative Report

### Workload & Compensation

Are your employees' portfolios and compensation in line with job descriptions/classifications and equitable?

OPTIONAL: Please check any additional sources used to provide external benchmark information for this component.

Site Visits

Interviews

Consultants

Literature Review

Other

What were the findings related to your employees workload and compensation?

What action item(s) resulted from these findings?

By when do you anticipate completing the action item(s) listed above?

I acknowledge that our department has discussed the content in these summative reports with our area's AVP.

Once you have completed your summative reports, please submit them to [papd@csusm.edu](mailto:papd@csusm.edu). Thank you!