

Memorandum

Budget/Financial Operations Office

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DATE: April 19, 2001
TO: Vice President's Council
FROM: Jerrold Pritchard
William Takehara
RE: Annual Assessment of Strategic Plan

The enclosed assessment report of the campus strategic plan is presented for your review. This report includes an evaluation of campus achievements as they relate to the goals and objectives outlined in the FY 1998-99 Strategic Plan. Also, there is a financial section which highlights FY 99-00 division expenditures, carry-forward and trust account balances.

Unfortunately, our report does not include information for University Advancement. The report, which was due to the committee on January 31, 2001, was not received.

In addition to this annual assessment, the Council would like to offer the following observations and recommendations regarding our assignment for academic year 2000-01.

- a. The link between planning and budgeting needs to be improved. For example, there are no planning committee members on the Budget Council.
- b. Objectives and strategies should be updated annually to reflect new campus programs.
- c. Strategies should be prioritized to assist with budget decisions. Additionally, this prioritization can serve as a benchmark for evaluating the success of the campus in accomplishing its objectives.
- d. Divisions should submit their achievements/budget reports to the Planning Committee in the Fall.
- e. Budget Council should establish both short and long-term plans for funding large dollar requirements such as technology equipment, Student Services Module, and quarters to semesters conversion.

- f. Division reports should expand on relationship between accomplishments and objectives and strategies. In many cases, the committee had difficulty understanding this linkage. Also, a number of accomplishments were left out of reports.
- g. Basic core functions such as teaching and scholarship need to be highlighted in future reports.
- h. The committee would have appreciated more information on cross-division initiatives such as the Water Resource Institute, Conflict Resolution, Community University Partnership, and Entrepreneurship.

The Long Term Planning Council is available to address any questions that you may have on the enclosed reports.

Attachment

ANNUAL ASSESSMENT OF STRATEGIC PLAN FY 1999-2000 LONG TERM PLANNING COUNCIL APRIL 2001

GOAL #1: Becoming a learning community that excels in creating, applying and exchanging knowledge.

Objective 1.1: Formulate curricular and programmatic initiatives that respond to the diverse and evolving needs of learners. (Primary - Academic Affairs, Secondary - IRT, Student Affairs)

The university has made major strides in this objective. Reflecting its commitment to offer continuously-developing course work to meet the knowledge, skills, and perspectives required of a 21st-century citizen, CSUSB has created an MA in Communication Studies, developed a new four-year accelerated program, combining the BA in Liberal Studies with the Multiple Subject Teaching Credential, and started a BA in Criminal Justice at the Coachella Valley Campus. To support these and other new academic initiatives, the university library has revised all reference guides with emphasis on on-line usage protocols, developed e-mail inter-library loan services for increased assistance available to ESL students, and subscribed to a number of additional databases, including Books in Print, PsycINFO and Sociological Abstracts. The university, in its efforts to develop and institute comprehensive strategies that address lifelong and career learning, has completed a regional "needs assessment" and developed a plan within the College of Extended Learning for off-campus course offerings, as well as instituted programs to increase the number of students in the region pursuing graduate studies. CSUSB is actively engaged in improving student learning through the evaluation of both programs and student learning outcomes. The university assesses general education, and requires every academic program to develop and implement a university-approved student outcome assessment plan.

Recommendation: With the exception of the Liberal Studies Blended program, there needs to be more attention focused on diversity and on the evolving needs of undergraduates.

Objective 1.2: Create a learning community that supports the discovery and application of new knowledge about learning processes. (Primary - Academic Affairs, Secondary - IRT)

Divisions have also contributed to the creation of a learning community. The university has obtained funding to support three projects on "learning". CSUSB has adopted a number of technological advances to facilitate the discovery and application of new knowledge about learning processes, including, designing and constructing a smart classroom lab for faculty, conducting faculty development workshops each quarter, and providing remote access to the library's on-line databases. The campus has created training development and support programs for courses on line using WebCT, and increased the number of on-line courses it offers by 66 percent. The newness of this objective for the campus is reflected clearly in the relatively low level of response from all divisions, especially when compared to that for Objectives 1.1 and 1.3.

Recommendation: Expand information on three learning projects.

Objective 1.3: Meet academic degree and continuing education needs in the region. (Primary - Academic Affairs, Secondary - Administration and Finance, IRT, University Advancement)

During the 1999-2000 review period, the university has worked to meet the academic degree and continuing education needs in the region. The hallmark of this effort has been the construction of a permanent Coachella Valley Campus in Palm Desert, the groundbreaking ceremony for which was held in October 2000. In addition, the university has made substantial strides forward in meeting the needs of site-bound learners by offering more than 50 courses at Victor Valley Community College and seven at Palo Verde Campus. The campus has also expanded and enhanced automated transactions for students enrolled in WebCT courses, has transmitted 20 distributed learning programs, and developed a server for video streaming. CSUSB's commitment to meeting the region's academic degree needs is reflected in the creation of several new academic degree programs, including an MA in Communication Studies, a special Executive MBA program for physicians and a four-year accelerated Liberal Studies "Blended" program, as well as new concentrations in e-Commerce, Hydrology, Water Policy, and Dispute Resolution. To meet the demands of these new initiatives, the university has enhanced its technological support and resources for students and faculty by initiating web registration, and developing a DARS prototype on the web. CSUSB has also created a new student support center/lab, and doubled the number of faculty development workstations.

GOAL #2: Ensure a welcoming and safe intellectual, social and physical environment that engages campus members in the life of the University.

Objective 2.1: Create an organizational culture that actively promotes activities that support teaching, learning, professional development and international perspectives. (Primary - All divisions)

Significant efforts were made in enrolling international students and in offering cross-cultural programs. Enhancements were made to DARS, diploma and gift processing, grant reporting and financial aid services. Significant expansion of remedial programs. Improvements were made to diversify faculty, expand childcare services, streamline financial aid processes and enhance health care services. Campus developed a strategic plan for diversity that was presented to the AAHE Conference on Diversity in Higher Education. Major turnaround was recognized in promoting campus image, especially in Inland Empire publications.

Recommend status report on diversity efforts for staff/MPP employees.

Objective 2.2: Maintain a campus environment that supports faculty and staff efforts in all forms of scholarship: the scholarship of discovery, of integration, of application and of teaching. (Primary - Academic Affairs, Secondary - all divisions)

A commendable improvement in number and monetary value of grants and contracts. Funding provided for faculty to pursue patents and/or trademarks. Increase in professional development opportunities for staff, especially in area of training. Model United Nations and Fullerton Art Museum consistently among campus highlights.

Recommend additional examples of institutional support for scholarly activities and Library's contributions to scholarly mission.

Objective 2.3: Identify and implement practices that enhance a sense of belonging to the University and commitment to its many roles. (Primary - All divisions)

Open forums provide avenue for feedback to administration. Campus activities such as the summer entertainment program and Spring and Fall picnics foster campus atmosphere. Cross-Cultural and Adult Re-Entry Centers also sponsored campus events. Outstanding community involvement by Coachella Valley staff. Balanced Scorecard initiated in Administration and Finance division, which encourages employees to develop programs/processes, which enhance working conditions.

Recommend increase in involvement by staff in campus decision-making process.

Objective 2.4: Develop and maintain an administrative, fiscal and physical environment that supports the University mission. (Primary - Administration and Finance, Secondary - All divisions)

Campus grounds and facilities remain a showcase for the campus. Social gathering spaces completed near University Hall and Student Union. Improvements noted in Parking and Public Safety programs. Budget decentralization and policy to distribute new funds received positively. First multi-year financial plan was published. Campus received approval for a supplemental fee to support distance learning. Customer service initiatives (procurement card, University Hall Bursar Office, expanded office hours during registration) implemented successfully. Campus planning and execution for Y2K rollover a laudable success. Need to strengthen link between planning and budgeting.

Objective 2.5: Utilize technologies to improve teaching, learning, communication and administration. (Primary - Academic Affairs, Secondary - All divisions)

Initiatives such as the Telecommunications Infrastructure Initiative, Baseline Access Training and Support and CMS were started by the campus. For the first time, students could use credit cards to pay registration fees over TRACS. IRT designed and deployed student e-mail accounts. Distance Learning programs increased with the cooperation of the Teaching Resource Center and through funding from HACU. Video conferencing and smart classrooms were expanded.

Recommend long range plan for financing technology requirements and information security.

GOAL #3: Adopt a long-term strategy for university engagement in community partnerships.

Objective 3.1: Become the intellectual and physical hub of community activity directed toward educational, social and economic, and cultural advancement. (Primary - Academic Affairs, Secondary - All divisions)

- ◆ Completed fundraising for first CVC building.
- ◆ Completed major needs assessment in conjunction with community college to determine the area's perceptions of the campus and needs for types and locations of programs.
- ◆ Added new certificate programs and dozens of new courses in response to locally defined needs.
- ◆ Centralized and improved Campus Events Scheduling with new office, website and more personnel.
- ◆ Hosted two Career Fairs, Health Fair, Creative Writing Day, and Diversity Workshop.
- ◆ Environmental Expo 2000 held with great community attendance.
- ◆ First-Water Resource Institute Conference.

- ◆ Continued Harry Rheubottom/George Webster Local History Lecture.

Recommendations: Divisions need to expand on efforts by the Womens Resource Center, Outreach to K-12 area schools, and programs for students with disabilities. Also, the campus should strengthen the relationship of community-related initiatives with the university's education mission.

Objective 3.2: Engage external communities in partnerships to promote educational, social, economic and social advancement. (Primary - Academic Affairs, Secondary - Student Affairs, IRT, University Advancement)

- ◆ The International Institute activities expanded such as Cuba exchange project, Fulbright Workshops, guest speakers, etc.
- ◆ Community College recruitment re-engaged.
- ◆ WASC Approval of Executive MBA for delivery in Fulda, Germany.
- ◆ Executive MBA degree for physicians/health executives offered off-campus in Colton.
- ◆ Implemented distributed learning programs and launched off-campus site at Victor Valley College with support of Title V Grant.
- ◆ Presented workshop on art, local history and culture for SB Chamber of Commerce Leadership.
- ◆ Created Arrowhead Securities Analysis Lab with support of community leaders.
- ◆ Provided consultation on assistive technology to CA Dept. of Rehabilitation counselors in Victorville, San Bernardino, and Riverside.
- ◆ Secured \$ 838,000 in federal, state and local grants in support of Water Resources Institute.
- ◆ Provided equipment, expertise and training to Provisional Accelerated Learning Center.
- ◆ Redefined and enhanced College of Extended Learning Advisory Committee.

Objective 3.3: Value and reward activities related to community outreach and partnerships. (Primary - All divisions)

- ◆ Expanded Work-Study funding and Cal-teach internships.
- ◆ Arrowhead CEO Award Luncheon held.
- ◆ Participation in IE Purchasing Effectiveness Network to identify ways local government entities can increase use of local vendors and ways to collaborate among local government agencies to reduce cost.
- ◆ Developed and presented telephone courtesy classes for campus personnel.

Recommendation: Divisions need to increase attention to this objective.

Long Term Planning Council Memberships

Jerry Pritchard, Co-Chair

Bill Takehara, Co-Chair

Sandra Kamusikiri

Patrick McInturff

Lydia Ortega

Johnnie Ann Ralph

Terry Rizzo

Susan Summers

Howard Wang

Jenny Zorn