

OSD Strategic Plan



GATEWAY TO THE ACADEMY

Office of Student Development



University of California, Berkeley

Greetings!



This publication was designed to both document our department's strategic planning journey during 2006-07 and to honor the Office of Student Development (OSD) staff whose extraordinary and unprecedented participation ensured our success. Our intention is to tell our strategic planning story and in doing so perhaps help others who are embarking on a similar journey.

With one Google scholar search of the strategic planning literature we quickly learn that there is no one right way of doing strategic planning (though I imagine there are many wrong ways!). I had a particular interest in providing opportunities for the entire OSD staff to engage in both meaningful and transparent ways toward shaping the future of their organization and profession.

As the title of this booklet aptly notes, we are concerned more with the process of strategic planning and less with the actual outcomes. Thus, this booklet is organized to provide the most salient planning information for your quick perusal. From information about OSD units, to Strategic Process Components, Guiding Questions, Roles and Responsibilities, Action Planning, Planning Principles, select Initiatives, and Lessons Learned; our hope is that through our experience, you will gain a greater appreciation for providing staff with high level planning and analysis opportunities. The model of utilizing willing staff with content knowledge and expertise from within the area being analyzed takes advantage of the talents and know-how within the organization, and it also provides extraordinary professional development opportunities for all members of staff as they move to mid-level and more senior positions at UC Berkeley and beyond.

We in OSD believe that students are the centerpiece and the cornerstone to our profession. They are critical to the successful delivery of all our programs and services. However, students were not a part of the formal planning process because of availability and scheduling, yet some Chairs, for whom planning goals would have direct impact on students, consulted them on particular aspects of the goals prior to finalizing. Students will be, however, integral to the implementation phase of this process beginning next year.

I am privileged to work with one of the more talented, knowledgeable, and dedicated staffs in the country. Nowhere is the commitment to students more palatable, the passion for inclusion and justice more pronounced, and the quest for being and doing better more perceptible.

With best regards,

Jerlena Griffin-Desta

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Executive Director & Doctoral Student,
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The Office of Student Development is one of seven units within Student Affairs' Residential and Student Service Programs cluster. We comprise 50 full time staff and over 600 student leaders. We are considered the "Gateway to the Academy" because we provide quality programs and services that focus on the students' transition into the university. Our work necessarily locates students, professional staff, faculty, administrators, and families within an intimate residential context to ensure students' academic, intellectual, and social success while at the University. We accomplish this through four main areas:

New Student Services: programs and services that successfully transition students into the Academy: Cal Student Orientation, Summer Bridge, Welcome Week, First Year Experiences, and student yield activities.

Residential Living: programs and services that seek to engage students within an intimate living/learning community where students learn to: explore their identities, value participatory leadership through service, engage across differences, resolve conflict, and strengthen intellectual curiosity.

Academic Services: programs and services that give residential students the opportunity to academically succeed at the University. We offer: academic theme programs, residential faculty programs, one on one tutorials, professional and peer academic advising, on-site classes, including Freshman Seminars, quiet study rooms, computer access and other printing and technology services in each Academic Center.

Family Programs: programs and services for nearly 3000 students and their families, (60% international,) in two residential locations. Programs include a myriad of recreation/sports and youth programs, on-site early childhood education and primary schooling, computing, study rooms, and drop-in babysitting, Resident Advisors, and full time program staff.

In the Beginning

Several departments in Student Affairs at UC Berkeley undergo a review to determine effectiveness and quality of programs and services. Each area is allowed to determine the most appropriate methodology for their review. OSD was last reviewed five years ago, with Dr. Pat Mielke from the University of Maryland, College Park, serving as the lead reviewer. This year, we wanted to move away from an external review, which tends to assess current program effectiveness by relying on both internal and external stakeholders' perceptions and experiences, and look more closely at what would be our strategic goals and initiatives over the next five years, utilizing staff within OSD that are the resident experts in their particular field.

Process Components

Strategic Direction & Roles

The Executive Director (ED)

The ED was responsible for providing the overall vision and direction for the planning process. Utilizing campus planning reports, departmental mission, vision, and value statements, past review recommendations, cluster and divisional goals and initiatives, and key campus and departmental program policy documents, the ED made this information available to the Planning Team for incorporation into the overall planning process.



Planning Team

This group consisted of each of the ED's direct reports and other represented staff from the OSD areas. They led the analysis of the documents noted above, along with the SWOTs (Strengths, Weaknesses, Opportunities, and Threats) and developed seven planning principles from which Committees were created to further develop goals and initiatives for the next five years.

Project Intern (PI) *stipend position, application required*

The three PIs reported to the Executive Director and served as the primary liaison between her and the committee chairs. Two PIs were assigned to two committees and one PI worked with three committees. Specific duties:

- Monitored the progress of each committee
- Provided necessary analysis and information/data gathering to the Committee Chairs as requested
- Assisted the Chairs with planning meetings
- Posted meeting notes on Active Directory (shared OSD server);
 - Coordinated funding needs with Chair
 - Represented planning process to internal and external constituencies
 - Met weekly with the ED to discuss overall direction and progress

Sponsor

The principle Sponsor served as an expert consultant to the committee responsible for developing their objectives. The Sponsors were direct reports to the ED. Specific duties:

- Served as consultant and advisor to the planning team
- Provided any relevant information/data to the team as requested
- Ensured that the planning team was meeting the objectives as

- articulated in the document
- Served as key liaison to the Project Intern assigned to the team

Committee Chairs

Staff at varying levels volunteered to Chair or Co-Chair a particular committee. Specific duties:

- Scheduled, planned, and facilitated committee meetings
- Completed SMART (Specific, Measurable, Relevant, Attainable Timely) goals and all Progress Reports
- Determined the priority for implementing each initiative under each goal
- Wrote final committee report
- Along with PIs and ED, represented the Planning Goals to internal and external constituencies

Initial Planning & Strategic Analysis

SWOTs: Each Direct Report to the Executive Director responsible for a program or major function within OSD was asked to complete a SWOT analysis and share their findings with the Planning Team manager at a three-day off site retreat.

Guiding Questions: We identified two guiding questions that would help shape our thinking about the kind of organization we want to be and the kind of programs and services that we would provide.

- *How is OSD both shaped and constrained by the relational framework of our environment? (UC Office of the President, UC Berkeley, Student Affairs, Residential and Student Service Programs, and other campus departments).*
- *How do OSD/RSSP policies/procedures grant or deny material benefits to some and deny others? How do they define values and/or confirm status?*

Off Site Retreat

To kick off the Strategic Planning process the OSD Management Team spent two-and-a-half days on retreat, during which time the OSD Direct Reports shared the results of the SWOT analyses. Utilizing information from the SWOTs and the guiding questions, the Planning Team developed several guiding principles, thus providing the initial framework for the OSD Strategic Planning process.

It was important for us to engage the entire department during the early stages of the strategic planning process. Upon return to campus, each OSD unit manager

was asked to share the retreat proceedings with their staff and review and respond to the guiding principles produced by the retreat participants.

Each manager utilized different methods to solicit feedback from their respective staffs. Some organized a half-day retreat while others used a series of staff meetings. Each area presented their responses at a department-wide meeting where we discussed (healthy debate) the feedback from all levels of staff.



Refinement: Durant On Site Retreat

To best incorporate the responses and feedback generated by the entire department, we reconvened the original retreat participants (planning team) and facilitated a discussion to condense the responses. We conducted a prioritization exercise to determine the goals that shared the most support. We incorporated the original language that staff provided as we believed this to be important to assure that everyone's feedback was included. Upon completing the prioritization exercise, many common themes surfaced and seven Planning Goals evolved, each with their own set of objectives.

Planning: Intense three months

This Phase of the process is where the bulk of the involvement from the entire department took place. With nearly everyone employed in the department working on at least one of seven different planning committees, meetings were held over the course of three months to address the charges each group was given. The planning groups conducted research, met with campus partners, and generated packets of supporting materials that needed to be reviewed and discussed. Committee progress was shared with the ED over the course of the three months and final SMART (Specific, Measurable, Attainable, Relevant, Timely) goals were submitted at the end of the semester. We culminated the planning phase at a day long retreat, where each Committee Chair was asked to present on their process, findings, and recommendations. Each Committee Chair, Sponsor, Project Interns, and the Executive Director were present to hear the information, ask questions, and offer suggestions.

Project Interns



Project Intern Testament

Serving as a PI provided us the opportunity to immerse ourselves with the Office of Student Development from an organizational perspective. We gained greater insight into how a large organization can utilize its staff to establish a vision for change by evaluating current structures and functions.

This process was both exciting and challenging for everyone involved. Because of the amount of work and the opportunity that this process would generate, many staff members found themselves feeling stressful one moment while fully engaged and exuberant the next. Maintaining open and healthy communication lines amongst committees, sponsors, and the Executive Director was central to our role as PIs. We discovered that good communication relieved staff stress and allowed them to be more engaged and committed to the process.

The PI role was just one of many involved in our Strategic Planning process. Sponsors, Chairs and Committee members were asked to collaborate, dedicate and contribute to this process. Depending on the style of the Committee Chairs, the involvement of the Sponsors, and the dynamism of the committees, our roles as Project Interns varied. At times, we helped plan and lead meetings and other times, we merely participated as any other member of the group. We also assisted in the development of budget proposals, provided background materials, and helped organize the committee's reporting and communication. Through this experience, we gained a better understanding of the organizational complexities that impact the Office of Student Development and the Residential and Student Services Programs cluster.

The final phase of the PI position is to ensure that the yearlong commitment of staff time and effort is communicated and recognized. In conjunction with the Manager for Research & Planning, we created presentations and publications showcasing our department's work and implementation strategies for moving the Office of Student Development forward into the next five years and beyond.

Office of Student Development Strategic Planning Participants

Initial Planning Team

Jackie Blossom-Garcia, Administrative Analyst
Roseanne Fong, Director, New Student Services
Troy Gilbert, Associate Director, Residential & Academic Programs
Cora Gerdes, Interim Associate Director, Community Development & Inclusion
Jerlena Griffin-Desta, Executive Director, Office of Student Development
Stacy Holguin, Manager, Judicial Affairs & Compliance
Jillian Love, Assistant Director, Residential Living
Dan Ocampo, Assistant Director, Residential Living
Je Nell Padilla, Manager, Research & Planning
Nora Sandoval, Summer Bridge Director
Anne Taylor, Budget Manager

Planning Goals

After three months, each committee completed several initiatives related to their planning goal, which was then referred to the appropriate manager for implementation during 2007—08. To review the full initiatives, please go to our website:

<http://www.housing.berkeley.edu/student/>

☀ *Create an environment where both student and professional staff thrive within a dynamic and engaging work environment.*

Sponsor: Troy Gilbert

Co-Chairs: John Paul & Troy Gilbert

Project Intern: Michael Taylor

Planning Team: Stacy Holguin, Yoomi Choi, James Carroll, Diana Tran, Cora Gordes, Dan Ocampo, Anjna Champaneri

☀ *Promote access and inclusive opportunities for diverse populations of students and staff by honoring diversity, educating and collaborating with different communities (students, families, staff, faculty, other departments, parents, alumni, etc.) and fostering a culture of respect, civility, tolerance and belonging.*

Sponsor: Cora Gerdes

Co Chairs: Jessica Snider, Bradley Kane, Shannell Thomas

Project Intern: Nora Sandoval

Planning Team: Monica Cortes, Roseanne Fong, Nicole Lowy, Tera Nakata, Norton Mitchell, Anjna Champaneri

☀ *Design programs that are aligned with the university's missions and values by using comprehensive assessment tools and incorporating ongoing evaluations of programs at regular intervals.*

Sponsor: Je Nell Padilla

Chair: Je Nell Padilla

Project Intern: Erik Drobey

Planning Team: Tavie Tipton, Diana Tran, Jenne Mowry, Kathy Kwong, Bradley Kane

☀ *Streamline various OSD administrative functions through the creative use of training, technology, staff, and financial re-allocation.*

Sponsors: Anne Taylor and Erin Wixson

Co-Chairs: Jackie Blossom-Garcia & Erin Wixson

Project Intern: Nora Sandoval

Planning Team: Devin Kinyon, Kathy Kwong

☀ *Execute the University's academic mission through meaningful and dynamic partnerships with local cities, municipalities, school districts, and academic support units on campus.*

Sponsors: Dan Ocampo and Roseanne Fong

Co-Chairs: Dana Bache, Lester Deanes

Project Intern: Erik Drobey

Committee Members: Tera Nakata, Dana Bache, Dara Birnbaum, Shalina Akins, Devin Kinyon

☀ *Provide dynamic living and learning environments that foster leadership, personal growth, and future success for students and their families.*

Sponsors: Dan Ocampo & James Carroll

Co-Chairs: James Carroll

Project Intern: Nora Sandoval

Planning Team: Lester Deanes, Shannell Thomas, Leslie Meyer

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☀ *Evaluate, improve, and create security, health and safety processes and procedures for all staff, residents and their families.*

Sponsors: Stacy Holguin, Pepper Black & Jillian Love

Co Chairs: Wade Crawford & Stacy Holguin

Project Intern: Michael Taylor

Planning Team: Nicole Lowy, Margie Williams, Eric Tejada,

Monica Cortes, Leslie Meyer

Planning Materials

Initial Planning Retreat Exercise

The outcome of your session is to develop principles that OSD should consider as we plan for the next five years. To stimulate thinking, please review the supporting materials, utilizing the information provided. Your principles must reflect a good understanding of the organizational culture of which we are a part (UCB, SA, RSSP, & OSD). Here are some questions to consider during your group session:

- What does meaningful engagement across all types of differences really mean?
- How might we realize this in a more thoughtful, intentional, and purposeful way?
- What do we want to be known for?
- What are areas of expertise (in addition to our obvious functional roles, e.g. academic support, transitional support)?
- Are we providing the best programs and services to our students? How do we know?
- Given what we know about our student staff, do you think we should increase or decrease their level of responsibility within OSD?
- Is OSD (NSS, RL, AS, FP) a good place to work? Why or why not?

You might begin your planning goal with the following question:

As OSD plans for the next five years,
it is critical that _____

This is not a rule-oriented exercise. You should feel free to approach this task as creatively as you choose.

Articulating Smart Goals

To ensure programmatic alignment, please note the RSSP, Student Affairs, or Campus Goal/Priority that this initiative addresses: _____

ACTS

Circle the OSD Value that you are addressing:

ACADEMIC SUCCESS **C**OMMUNITY DEVELOPMENT **T**RANSITIONAL SUPPORT **S**ERVICE TO STUDENTS

Circle the Functional Area for this goal:

SAFETY AND SECURITY PROGRAMMING STAFFING ORIENTATION
TRAINING CONDUCT ASSESSMENT OTHER

SMART Goal Considerations:

Be specific: Clearly state what you would like to do in the above identified areas. Should you narrow your focus? • Is this a feasibility study or would this require immediate implementation? • Please be succinct and state your goal in one sentence.

Goal Statement:

Measurable Outcomes: How will you know when you have completed the goal? Are you able to quantify or qualify the results? If you are implementing a program, note implementation steps. Have you provided assessments or evaluation plans?

Attainable: Can this project realistically be achieved given what we know? Why or why not? What/Who are the real and potential roadblocks? What is the political climate?

Relevant: How is this project relevant to our Mission and Vision? • How will it enhance our mission, vision, or values?

Timely: Identify progress points and completion dates? Is this realistic given what you know about the campus and our department's work cycles or student schedules? If the goal is a feasibility study, when should it be completed?

Other issues not considered

Resources: Quantify both human and fiscal resources.



Acknowledgements and Thanks



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The entire **OSD staff** whose engagement and commitment have set standards that we have yet to realize;

The **RSSP Directors** whose active interest, support, and guidance provided morale boosting when most needed;

Interim AVC — RSSP Peter Hoenig and Interim VC Student Affairs Harry Le Grande for your faith and trust in staff to do this important work;

Colleagues in RSSP who provided expert opinions and analyses on whatever we needed, especially staff in HOME (Housing, Operations, Maintenance, Environment), Cal Housing, RSSP's Human Resources, Budget and Finance, Marketing Communications, and Information Technologies;

Keith Stevenson, Sr. Publications Coordinator, RSSP Marketing—whose graphic artistry continues to astound us all.



To review the initiatives, please go to our website:
<http://www.housing.berkeley.edu/student/>

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