STRATEGIC PLAN 2014-2019

FINAL

Approved on 07/01/14

ORGANIZATION OVERVIEW

The Associated Students Incorporated (ASI), is a recognized auxiliary organization of Cal Poly Pomona that is charged with supporting the University's educational mission and is led, funded and staffed mostly by students. It is a non-profit corporation that employs close to 400 student and nonstudent staff, and provides a wide range of facilities, programs and services. With student success as the cornerstone of ASI, the organization advocates for student interests at the local and state levels while providing a student voice and perspective through campus committees and system-wide organizations.   ASI also offers leadership development opportunities through student government, student-led programming, student employment and student involvement through a wide array of Bronco Student Center (BSC) and Bronco Recreation and Intramurals Complex (BRIC) programs and services. ASI advances the enrichment of student life by providing substantial annual funding for student clubs and organizations, diversity programs, and academic support programs.

STRATEGIC PLANNING PROCESS

ASI's strategic planning process included an environmental scan, identification of stakeholders, SWOT analysis, mission statement review, vision statement, and formulation of strategic goals and objectives. ASI's approach to the process was inclusive of the entire organization involving staff, student employees and student leaders' input. The Executive Task Team consisting of ASI executive student leaders and directors was established to help guide and structure the preparation of the ASI Strategic Plan. Five Task Teams were subsequently created to focus on five major aspects of the organization to include: Organizational Infrastructure; Facilities; Programs and Services; Marketing and Communications; and Student Community/Student Engagement.

Comments and feedback from students, ASI staff and other members of the campus community have been encouraged throughout the plan's development. Staff and administrators participated in task team meetings and broad feedback was solicited through ASI's website. Students provided input through regular consultations with ASI councils, an open forum for students using a "Pizza with the ASI Student Leaders" format and a social media poll which generated a record-breaking count of online responses from the student body. Two CSU auxiliary administrators also provided an independent review and recommended enhancements to the plan. The draft Strategic Plan was shared with the ASI staff and Executive Task Team prior to approval by the ASI Senate and final approval by the University.

MISSION STATEMENT

Associated Students Incorporated, Cal Poly Pomona is a California State University recognized auxiliary organization and a nonprofit corporation that seeks to:

- Foster student advocacy, representation, engagement and academic success
- Establish opportunities for learning, leadership and development for students and its staff
- Create an environment that promotes collaborative partnerships, cultural diversity and campus pride, and
- Provide high quality facilities, programs and services to students, administrators, faculty, staff, alumni and the off-campus community.

VISION STATEMENT

ASI's Vision Statement was developed through extensive consultation with staff at ASI Team meetings, several discussions at ASI Cabinet and Senate meetings and input from the student body via the social media poll. The vision statement for the next five years conveys ASI's intent to make a difference for students, as follows:

<div align="center">

"Enhancing the student experience"

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MOTTO

The motto of ASI reflects the pivotal role that student leadership plays in serving the student body.

"Students Serving Students"

VALUES

ASI embraces a set of core values that inspires its team members in the fulfillment of their duties and responsibilities and guides the manner in which they interface with others outside the organization.

INTEGRITY - HONOR - DEDICATION - LOYALTY - RESPECT

INTEGRITY

Integrity conveys character and accountability. We strive to maintain integrity by exhibiting the highest degree of professionalism and consistently setting a good example.

HONOR

Honor stands for the highest standards of honesty, truthfulness and virtue. We uphold honor by acknowledging and validating the core principles of every individual.

DEDICATION

Dedication exemplifies our deep commitment and passion for the mission of the organization, as manifested in our work and interaction with the student body and the campus community. Dedication inspires us to look out for the interests of the organization and the student body we serve.

LOYALTY

Loyalty provides the foundation for our connection with the student body and the campus community. Loyalty bonds us together to uphold the dignity and stature of the organization, seeks its continued improvement as well as foster campus spirit and pride.

<u>RESPECT</u>

Respect represents the regard and esteem that we demonstrate for each other, each student and each community member. Through respect, we nurture an environment that is accepting of the beliefs and opinions of the others and upholds the dignity of all.

INTERNAL AND EXTERNAL STAKEHOLDERS

INTERNAL

- Students - Current and Future
- ASI Staff
- Programs and Services Customers
- Chartered Student Organizations and their members

EXTERNAL

- CSU System
- Cal Poly Pomona University Departments, Faculty and Staff
- Cal Poly Pomona Foundation (CPPF) Staff
- Alumni
- Bronco Student Center (BSC) Lessees
- Other CSU Auxiliary Organizations
- Sponsors
- Service Providers
- Programs and Services Customers
- Innovation Village Companies
- Chartered Student Organizations and their members
- California State Student Association (CSSA)
- University Advisors
- Auditor/Legal Counsel
- Local/Pomona Community
- Accrediting Agencies
- Professional Associations

The strategic plan for the next five years was developed within the framework of influential factors that were discussed extensively in meetings for the Task Teams, ASI Team of staff members, Cabinet and Senate. The scan includes both internal factors that come from and are influenced by ASI directly as well as external factors that are outside ASI's direct control. The underlying theme for the next five years is *change*. Both internally, with the dramatic growth of ASI through the addition of the Bronco Recreation and Intramural Complex, and externally with the changes in campus leadership, conversion to a semester calendar and new CSU initiatives, change is a current that will be running through ASI as it executes this strategic plan.

For the past five years, ASI has been outlining the financial plan, staffing plan, programs and services that will be added with the opening of the BRIC and has adjusted the entire organizational staffing model to prepare for the anticipated growth. However, there are several factors that will be beyond the control of ASI and the organization intends to remain flexible to address the changes in the environment during the strategic plan period. The new multi-purpose lounge space in the Bronco Student Center, which will be available as the Bronco Fitness Center moves out of the space, will allow for more seating options for students, which has been requested for several years. The aging of the BSC, however, is one of the organization's greatest concerns, especially with the original section of the facility that once was the "University Union", reaching a 40 year life span. The mechanical systems in the BSC are reaching or have exceeded their life expectancy. ASI started planning to address these concerns by engaging architectural services to conduct an assessment of space allocation, energy use and code compliance challenges for the BSC. The estimated costs to repair and renovate the building are considerable and planning will take years to ensure that the facility remains responsive to the changing needs of students and makes progress towards efficient energy use and sustainability.

Externally, the changes are more dramatic and unpredictable. Along with a new President for Cal Poly Pomona starting in 2015, the executive leadership of the University has been undergoing change with the turnover of two Vice President positions in the past year. There are several existing campus initiatives that are expected to alter the environment for ASI in the next five years. The campus is gearing up for the conversion from a quarter to semester schedule by Fall 2018. The Campus Climate Commitment signed by President J. Michael Ortiz has driven a focus of sustainability for the campus and ASI for recent years and the foreseeable future. The campus has aggressive plans to build a new student services center as well as new residential buildings and academic classrooms. Technology has also been a hot topic and with the passing of the Student Success Fee in 2012, the wireless infrastructure has already begun to

be addressed. Revenue from the Student Success Fee will fully support the funding that has been provided by ASI for athletic scholarships by 2015, thus enabling ASI to reallocate more funds for student organizations. CSSA has also discussed the implementation of the Student Involvement and Representation Fee (SIRF), a system-wide student advocacy fee at the system-wide level, which is already in place for the UC and Community College systems. The fee has been presented to the CSU Board of Trustees and is pending until Board approval is completed. With the possible implementation of the fee, this will relieve pressure from ASI's budget process to earmark funds for the CSSA dues.

The higher education climate in the United States is unpredictable. State funding for systems like the CSU have been falling for years, driving student fees higher. These budget challenges have impacted enrollment levels and fee revenue for CSU auxiliary organizations. At the same time, on-line learning opportunities through the proprietary giants, Massive Open Online Courses (MOOCS), and even the CSU's own on-line learning program are providing access to higher education for students, but without requiring students to be on campus and participating in the programs and services provided by ASI. As fees increase, students may also need to find employment to help pay for tuition and expenses, which could also limit the amount of time for students to be engaged on campus.

Finally, Cal Poly Pomona is approaching a decision on whether or not to claim full program impaction for all majors on campus. How this will impact campus life, student persistence, and ultimately the graduation rates can only be a guess at this time. The university is looking into the addition of an early childhood development major which can significantly impact the future for the Children's Center. Also in the next few years, the campus will be preparing for its Western Association of Schools and Colleges (WASC) accreditation visit. WASC's recent focus on learning outcomes and the requirement for institutions to provide concrete evidence of learning across campus affects all departments, including ASI. As such, ASI has already noted the need to develop a culture of assessment to understand the organization's impact on student learning and development, the value of its programs and services, and what role ASI has in the success of students as they pursue their degree.

Based on the environmental scan, an analysis of ASI's strengths, weaknesses, opportunities and threats (SWOT) was conducted. The SWOT analysis involved the identification of internal (strengths and weaknesses) and external (opportunities and strengths) issues for ASI in the next five years. The SWOT analysis highlighted what ASI may need and the obstacles to be overcome or minimized, in order to achieve its strategic goals and objectives.

Each of the Strategic Plan Task Teams engaged in a SWOT analysis for their assigned area of focus. The summary below outlines the major conclusions that were reached at these meetings.

STRENGTHS:

Personnel:

ASI has a strong team culture, dedicated and competent team members and student leaders who apply the "learn by doing" philosophy in their roles in student government.

Quality information technology (IT) support is provided to ASI by University personnel through a contractual agreement.

The full-time and student staff requirements to operate the BRIC are substantially in place and will be fully filled by Summer 2014.

Funding:

The majority of ASI's revenue is from mandatory ASI and BSC student fees. These fees are adjusted annually by the Higher Education Price Index (HEPI) which is an inflation index designed specifically to track the main cost drivers in higher education. This annual adjustment provides stable funding support for growing needs.

The Children's Center has successfully obtained grant funding for the support of its operations.

The implementation of the Student Success Fee and ASI Funding Reallocation Initiative (approved through a student referendum and by the University), has increased funding for student organizations, thereby contributing to a quality student life.

Programs and Services:

The BSC serves as a central gathering place where the campus can access services such as dining/vending food services, recreational and wellness, ATM and banking resources, copy and mail, marketing and graphic design, conference and meeting support, and ample places for studying and lounging.

The BRIC will be opening in Fall 2014 and transforming student life through a significant increase in recreation programs and engagement opportunities.

The ASI Bronco Events and Activities Team (BEAT), which consists of volunteer student programmers, has been effective in the planning and co-sponsorship of programs and activities for the campus community, in collaboration with student organizations and campus departments.

The Friday and Weekend Programs, which is a partnership with the campus, continues to draw an impressive turnout, thereby enriching the involvement of students.

Through ASI's partnership with the BSC lessees, we are able to augment ASI's ability to provide convenience services to students and the campus community.

Organization:

At the CSU system level, ASI continues to maintain its "auxiliary in good standing" status and track record for unqualified financial audits. At the campus level, ASI remains committed to its motto of "students serving students". In ASI's desire to serve, it continues to maintain a culture that is open to innovation, growth and partnership opportunities.

During the past five years, ASI has planned diligently for the staffing and resource requirements for its growth with the opening of the BRIC.

WEAKNESSES:

Personnel:

ASI will double its portfolio when the BRIC opens in Fall 2014. It has limited staff resources to handle the orientation of a larger team, coverage for night and weekend events and additional functions such as the administration of the club sports program.

Programs and Services:

ASI's marketing reach does not currently cover the entire campus and revenue generating departments do not regularly utilize social media for marketing purposes.

Funding for BEAT programs is not at a level where ASI can program for large scale events on its own. A formal partnership agreement between ASI and the campus still needs to be developed. There is limited availability of equipment for programming in some departments

Assessment of customer satisfaction and feedback is not conducted on a regular basis for all programs and services.

ASI currently does not have the full staffing and risk management structure to support recreational clubs.

Facilities:

The original section of the BSC which opened in 1974 is an aging facility with building systems exceeding their estimated life, code compliance challenges and space allocation issues. Department space needs have, in some instances, outgrown their current locations.

The location and mounting of directional signage in the BSC does not provide immediate guidance and convenience, particularly to first time guests and visitors.

Information Technology (IT):

ASI has not kept up with integrating innovations in technology, particularly the use of mobile applications to reach out to and serve students.

There is a lag between staff training and ongoing changes in computer systems that inhibits the full utilization of available technology resources.

OPPORTUNITIES:

Programs and Services:

The opening of the BRIC will create opportunities for increased recreation and wellness based programming, development of campus partnerships with summer camps, corporate retreats and with other off campus organizations. The BRIC also includes a partnership with the Cal Poly Pomona Foundation to provide Jamba Juice.

The conversion to a semester system will allow for new programming opportunities, creativity on program scheduling, increased partnerships with Housing and student organizations and more time for assessment of continuing and new programs.

The Children's Center can explore partnerships with the community, school districts and Cal Safe Programs to advertise and serve more students with children.

The Children's Center will seek additional funding through grants.

The Conference and Events office can partner with Kellogg West to expand the volume of conferencing activity in the BSC.

The Games Room, Etc. can look into creative marketing strategies to generate more event reservations and frequent player card usage.

Campus:

By the end of the current calendar year, there will be a new campus President. With a new President, there could be new opportunities for ASI to partner with the campus on new initiatives.

Information Technology (IT):

The use of social media and mobile applications, a new payroll system and financial software solutions can lead to improvements in organizational marketing and operational improvements.

THREATS:

Personnel:

The growth of the organization, the rising costs of benefits, minimum wage increases and slow economic growth has made it challenging for ASI to maintain a competitive compensation structure and keep up with market rates.

Programs and Services:

The requirement to utilize campus catering for BSC reservations and the price of food on campus could have a negative impact on conference and lease revenue.

The level of involvement and participation in BRIC and BSC programs can be constrained by limitations in parking access.

The Games Room, Etc., BRIC and Conference and Events services may potentially see a shift in student and customer venue preferences that can impact the utilization of reservable space and revenue.

Information Technology (IT):

The current model of contracting with the University for providing full IT support will pose challenges with the consolidation of University IT services. ASI is completely dependent on the University for its IT needs and has to work within the context of University priorities and technology standards.

CSU:

As an auxiliary on the campus, any state budget cuts to CSU funding affects enrollment and could have a negative impact on ASI revenue and funding for its operational needs.

Fiscal:

The Children's Center has a good track record on obtaining grants, but the availability of grant funding can fluctuate and only provide funding for a limited time.

Organization:

As ASI grows with the opening of the BRIC, it needs to take a comprehensive and all-inclusive marketing approach to guard against the loss of our organizational unity and identity.

STRATEGIC ISSUES

Based on the outcome of the environmental scan and SWOT analysis, a number of strategic issues were identified for ASI to address in the next five years. These strategic issues served as the foundation for the development of strategic goals and objectives. The following evolved from the meetings of the Task Teams and provide the foundation for the strategic goals and objectives for the 2014-2019 plan.

As an auxiliary organization of the University, ASI will need to align its strategic plan with that of the University and the Division of Student Affairs (DSA). Through the Strategic Plan, ASI can plan for the anticipated campus environment in the next five years. The key strategic issues that were identified for both the campus and ASI include:

- Appointment of new campus President and potential changes in senior leadership and campus priorities
- Development of an updated Strategic Plan for the University and DSA that would impact ASI's Strategic Plan
- Conversion from a quarter to semester calendar by Fall 2018
- Need to further improve graduation rates
- CSU budget allocations for next five years which will affect enrollment levels and ASI fee revenue
- Capital projects planned for the campus and related impacts
- Access to parking for BSC and BRIC customers
- Need for a more defined framework for risk management relating to partnerships between ASI and the campus

ASI needs to sustain its efforts to provide high quality facilities, programs and services to serve the students and the campus community. In order to meet changing needs of students and the campus community, the assessment of customer satisfaction and feedback is critical and can guide the allocation of limited resources to the appropriate areas of priority. In addition to the above strategic issues, the following were identified:

- Impact of campus capital projects on program venues and availability
- Ageing of BSC facility and building systems and challenges with space allocation, signage and code compliance
- Possible shift in program and event calendars with the conversion to a semester calendar
- Increase in student tuition and fees and impact on student involvement

- Need to provide programs and opportunities for involvement for an increasing resident student population as well as commuter students
- Assumption of administrative oversight of club sports program by ASI
- Lack of an organization-wide assessment approach

ASI will double its portfolio with the opening of the BRIC in Fall 2014 and need to sustain a solid infrastructure into the next five years. Some of the strategic issues identified include:

- Ability of ASI to attract, train and retain quality staff
- Limitations to online access to financial reports for departments and customers
- Need for better integration of systems in various departments
- Limited application of mobile capabilities and use of social media outreach
- Lack of document management and work flow system
- Lack of resources to pursue external funding potential

ASI can maximize its ability to support the educational mission of the University and realize its mission through partnership and collaboration efforts at the campus and system-wide levels. A few strategic issues in this area include:

- Sharing and management of risk exposure for ASI and the campus through appropriate safeguards and documentation via partnership agreements
- New role for ASI in administrative oversight of club sports
- Inactive status of the ASI Alumni Board and need to re-engage ASI alumni
- Low number of partnerships with external organizations

STRATEGIC GOALS AND OBJECTIVES

The strategic goals and objectives for 2014-19 are aligned with ASI's role as an auxiliary organization to support the educational mission of the University. The environmental scan and SWOT analysis provided the framework for the identification of strategic issues facing ASI in the next five years. These strategic issues in turn inspired the development of strategic goals and objectives that are summarized below.

1. **Enhance opportunities for student engagement and ASI's commitment to academic excellence/progress to graduation**

   a. Increase the number of high quality programs with an emphasis on all areas of personal wellness
   b. Create new opportunities for incoming students in campus involvement, leadership development, and volunteerism
   c. Enhance year-round training programs for ASI students (leaders, staff and interns) to develop work and life skills through their experience with the organization
   d. Increase opportunities for internships and graduate assistantships in ASI
   e. Assess learning outcomes for ASI student leaders and staff to evaluate their academic progress towards graduation and preparation for their future careers
   f. Identify and implement additional outreach strategies to inform students about the opportunities for engagement with ASI

2. **Respond to the changing needs of students and the campus community through the provision and ongoing assessment of high quality facilities, programs and services**

   a. Evaluate programs, facilities and services through measurement of overall customer satisfaction and on a Universal Access standard
   b. Identify student needs and expectations for the future of the Bronco Student Center, utilizing the 2013 architectural review of the BSC, Energy Use Assessment and input from students and campus community
   c. Evaluate, identify and implement best practices for sustainability
   d. Assess the child care needs of the student population and availability of grants and external funding support

3. **Fortify ASI's infrastructure to support the growth of the organization, while providing resilience and flexibility**

   a. Increase ASI's web presence, social media outreach and mobile capabilities to better serve ASI, the students and the campus
   b. Provide additional local opportunities for professional growth and development for professional staff
   c. Evaluate the structure of the Maintenance and Custodial Departments based on leading industry standards
   d. Evaluate and identify changes in workflow and processes in preparation for semester conversion
   e. Identify resources and training needs in order to implement accessible technology solutions
   f. Maintain a competitive and equitable compensation structure within available resources
   g. Research possible funding sources and partnerships and evaluate availability of internal and external resources to support development work

4. **Strengthen partnerships and collaborations with ASI alumni, the campus, California State University (CSU) system and external organizations**

   a. Define risk management practices and responsibilities for campus partnerships
   b. Implement plan for administrative oversight and risk management for Sports Clubs
   c. Increase advocacy to support students through independent efforts and partnerships
   d. Establish an ASI alumni network
   e. Develop new partnerships to create programs and activities for students that fosters sustainability, diversity and campus pride