

**CALIFORNIA STATE UNIVERSITY, LONG BEACH
2001-2003 RESOURCE PLANNING PROCESS
MID-RANGE GOALS MATRIX**

<u>PLANNING AREA I: ENROLLMENT MANAGEMENT</u>	<u>PLANNING AREA II: RESOURCE MANAGEMENT IN A NO-GROWTH ERA</u>	<u>PLANNING AREA III: YEAR ROUND OPERATION (YRO)</u>
<ol style="list-style-type: none"> 1. Seek approval for impaction status as soon as warranted by enrollment demand. 2. Develop a plan for services that are required to retain continuing students and improve time to degree. 3. Develop plan or a process to maximize classroom utilization. <ul style="list-style-type: none"> • Comprehensive Career Development Center Services - Students with Disabilities (2) - \$30,000 (DSS) • Disabled Student Services - Augmentation for Mandated Services (2) - \$30,000 (DSS) 	<ol style="list-style-type: none"> 1. End the practice of "salary annualization" after AY 2000-2001. 2. Rethink campus planning structures and processes to adjust to an era of limited growth. <ul style="list-style-type: none"> • Faculty Promotions (2) - \$175,000 (AA) 	<ol style="list-style-type: none"> 1. Implement the short-range YRO plan for summer 2001 and until such time as we are able to implement long-range arrangements to manage YRO. 2. Develop a long-range plan for YRO with broad university consultation. 3. Develop a plan to provide appropriate compensation for department chairs and other personnel under YRO.

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<u>PLANNING AREA IV: QUALITY OF PROGRAMS AND SERVICES</u>	<u>PLANNING AREA V: QUALITY OF PHYSICAL ENVIRONMENT</u>	<u>PLANNING AREA VI: COMMON MANAGEMENT SYSTEM</u>
<ol style="list-style-type: none"> 1. Implement a strategic plan for systematically increasing “tenure density” over the next three years to five years. 2. Identify resources needed to support faculty scholarship and to strengthen the research infrastructure in support of scholarly and creative activity. <ul style="list-style-type: none"> • Campus and Student Initiatives (Core Responsibility) \$200,000 (President) • Library Acquisitions (Core Responsibility) - \$400,000 (AA) • College Operating Expenses and Equipment (Core Responsibility) - \$400,000 (AA) • College Communications (Core Responsibility) - \$100,000 (AA) • K-12 Partnership (Core Responsibility) - \$132,000 (AA) • Enrollment Services Phone Responsiveness (Core Responsibility) - \$43,000 (DA&F) • Staff Training and Development (Core Responsibility) - \$75,000 (DA&F) • Employee Housing and Relocation Services (Core Responsibility) - \$88,000 (DA&F) • New Faculty Start-up (1) - \$400,000 (AA) • Faculty Recruitment (1) - \$120,000 (AA) • Assistant Soccer Coach (1) - \$26,000 (SAR) • Faculty Travel (2) - \$200,000 (AA) • Second Year Assigned Time (2) - \$600,000 (AA) • SCAC Assigned Time (2) - \$90,000 (AA) 	<ol style="list-style-type: none"> 1. Maintain the adequacy and quality of the physical environment, including classrooms and faculty and staff offices. 2. Conduct a comprehensive review of the campus physical master plan. 3. Accelerate the calendar for the allocation of instructional resources. 4. Ensure adequate housing to meet the growing student demand. 5. Ensure that CSULB continues to be a highly safe environment free of violence, hostility, harassment, and discrimination; and that we are prepared for emergencies at all times. 6. Promote a major co-generation project for the campus under the Governor's recent budget message objectives. 7. Identify possible off-campus sites for non-instructional (e.g., research) programs. 8. Optimize the campus' ability to cope with the California energy crisis through aggressive conservation and energy efficient equipment, systems, and practices. <ul style="list-style-type: none"> • Mandated Annual Fire Alarm Certification (Core Responsibility) - \$98,000 (DA&F) • Relocation and Renovation (1) - \$300,000 (AA) • Academic Affairs Division Facility Support (1) - \$125,000 (AA) • College Instructional Computer Labs (1) - \$150,000 (AA) • Operate and Maintain New Building Equipment (1) \$88,000 (DA&F) • Afternoon and Evening Custodial and Grounds Services (1) - \$122,000 (DA&F) • Grounds Keeper to Maintain Athletic Fields (1) - \$32,000 (SAR) • Police Communications Center (5) - \$37,000 (DA&F) 	<ol style="list-style-type: none"> 1. Attain substantial CMS Human Resources and Finance modules by the end of the three-year planning period. 2. Maximize the benefits obtainable from CMS by adopting best practices and maintaining a system wide leadership position in the implementation process. 3. Communicate effectively with the campus community about CMS benefits and costs of implementation plans. 4. Find and implement a new student administration system that meets anticipated campus needs. <ul style="list-style-type: none"> • HRIS Academic Personnel (2) - \$66,000 (AA) • PeopleSoft HR and Finance Operational Support (2) - \$196,000 (DA&F)

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<u>PLANNING AREA VII: ASSESSMENT, QUALITY AND ACCOUNTABILITY</u>	<u>PLANNING AREA VIII: NON-STATE REVENUE</u>
<ol style="list-style-type: none"> 1. Complete a thoughtful campus review for the Western Association of Schools and Colleges resulting in full regional accreditation for the campus. 2. Track key indicators of quality of instruction and services as enrollment grows rapidly in the three-year planning period. 3. Encourage and support quality improvement programs in campus divisions and units based on respectively appropriate frameworks (e.g., academic assessment, program review, and balanced scorecard). 4. Begin to integrate, coordinate and share communication internally within the campus about quality improvement programs underway in respective campus divisions and units. 5. Continue the comprehensive communication strategy regarding assessment, quality and accountability for external constituents, including the Chancellor. <ul style="list-style-type: none"> • Federal Title IV Financial Aid Refund Compliance and Expansion of Cal Grant Programs (Core Responsibility) \$80,000 (DA&F) • Affiliation and Teaching Agreements (Core Responsibility) - \$50,000 (DA&F) • Retention and Graduation Initiative (2) - \$32,000 (DSS) 	<ol style="list-style-type: none"> 1. Develop and implement an incentive plan to support faculty and staff grant and contract activity. 2. Increase our focus on current students and their potential lifelong relationship with the university following graduation. 3. Broaden the revenue base of the CSULB Foundation. 4. Increase endowment-directed gifts substantially each year. 5. Expand contact with alumni through general and targeted publications, programs, services and on-line information. 6. In order to enhance the quality of our instructional services to the University's corporate, government, and professional constituents, support Continuing Education in development of a new Professional Education Facility. <ul style="list-style-type: none"> • Smartcall Telefundraising Management System (5) \$128,000 (UR&D) • Assistant University Webmaster (5) - \$50,000 (UR&D) • Alumni Programs Assistant (5) - \$27,000 (UR&D)

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CSULB Strategic Planning

Mid-Range Goals 2001-2004

MARCH 2, 2001

PREAMBLE

CSULB's Vision and Strategic Priorities articulate our commitment to strive for the highest quality in our instructional and support programs in order to provide our students with the best education possible. Our Vision and Priorities have been developed on the basis of broad consultation within our community.

In 1999, the Resource Planning Process Committee (composed of administrators, faculty, staff, and student representatives) recommended to the President that a process be developed by which "mid-range" (2-3 year) goals might be established in order to focus the decision-making processes of the Resource Planning Process. The President accepted this recommendation. In 2000, the Resource Planning Process Committee adopted the mid-range goals as the framework for soliciting proposals and used the goals an important input into funding recommendations. A separate document reports campus progress toward the goals.

Campus mid-range planning goals were developed collaboratively by the Provost, the Vice President for Administration and Finance, the Vice President for Student Services, the Vice President for Development, and the Chair of the Academic Senate. The Director of Strategic Planning facilitated this collaborative effort. The discussions aimed at identifying priorities that reflected shared all-university concerns and not those specific to the mission of each Division. The goal was to come to agreement about our most pressing problems and to create mid-range planning goals that each division could use to focus its budget priorities. In short, the primary goal was to have everyone working toward jointly agreed-upon ends.

These mid-range goals were created within the context of our existing Strategic Priorities; they do not replace them. Moreover, because these mid-range goals deal with current issues that may change somewhat each year as they are negotiated against the backdrop of changing circumstances. We expect that the normal period for these goals to remain largely intact will be three years. Finally, these mid-range goals do not encompass everything that is important in the pursuit of our Strategic Priorities. They attempt to give priority to dealing with the most significant current challenges and opportunities so that our efforts can be concentrated where they will bring us closest to our long-term goals.

The establishment of mid-range planning goals gives us the opportunity to assess how well we are achieving our objectives by providing more specific short-term goals. These goals include agreed-upon indicators of success that will help us to track our success. This will also facilitate the formation of new mid-range goals as the year's progress and we move on to new challenges.

PLANNING AREA I: ENROLLMENT MANAGEMENT

ASSUMPTIONS

Tidal Wave II presents a tremendous challenge to California institutions of higher education and has the potential to affect all aspects of the university. CSULB's enrollment is expected to grow steadily over the planning period, with freshman demand particularly strong. For the first time in many years, the university expects to be fully funded next year for its enrollment. During the planning period, we expect that our applications for freshmen will close in November and we will remain closed to new lower division transfer students. We expect to reach our currently defined campus enrollment capacity within one to two years. Once we reach our academic year campus capacity, we expect that the campus impaction plan will be approved by the Chancellor's Office.

The state budget provided to the CSU within the new Partnership with the Governor will increase modestly over the planning period to support enrollment growth at marginal cost. Once the campus attains impaction, less state funding for enrollment growth will be available.

We will continue to promote aggressively a positive image for the campus, using the President's Scholars Program as our flagship effort to attract high performing students. The campus understands that best practice of enrollment management is not limited to controlling admissions but includes managing course availability, retention, and support services for students.

OPEN/UNDECIDED ISSUES

How will we continue to cope with additional costs of enrollment growth that are not covered by marginal state funding? What is our plan to facilitate timely degree completion? How can we continue to best utilize marginal cost funds to maintain quality of instruction and services?

MID-RANGE GOALS

1. Seek approval for impaction status as soon as warranted by enrollment demand.
2. Develop a plan for services that are required to retain continuing students and improve time to degree.
3. Develop plan or a process to maximize classroom utilization.

PLANNING AREA II: RESOURCE MANAGEMENT IN A NO-GROWTH ERA

ASSUMPTIONS

CSULB will soon reach physical plant capacity and will therefore receive less enrollment growth funding, bringing to an end of the recent period of significant campus budget growth. Campus planning efforts must shift focus from allocating new dollars to planning in a period of no-growth. We expect that the Resource Planning Process Committee will continue to recommend workload formula allocations to divisions for at least one and perhaps several years.

OPEN/UNDECIDED ISSUES

How will CSULB planning efforts adjust to a period of no-growth? How will emerging needs and new initiatives be funded? How will funding be provided for ongoing high-cost programs?

D5 Mid-Range Goals

MID-RANGE GOALS

1. End the practice of "salary annualization" after AY 2000-2001.
2. Rethink campus planning structures and processes to adjust to an era of limited growth.

PLANNING AREA III: YEAR ROUND OPERATION

ASSUMPTIONS

CSULB will convert to year round operation (YRO) in summer 2001. The campus will proactively plan for impacts of YRO in many areas including academic policies, academic calendar, facilities maintenance, operations, staffing, and personnel. The campus will proactively plan for a reasonable transition period for our Continuing Education program, which is a valuable campus asset. Financial aid in the summer term under YRO will be provided in the form of State University Grants (SUG) and student loans.

OPEN/UNDECIDED ISSUES

How shall we examine and revise our schedule of fees? How can we maintain the viability and benefits of our Continuing Education operation? What / how will the CSU adjust campus capacity under YRO? Will summer become a recognized admissions term? What impact will YRO have on our regular term enrollment? How do we determine which academic programs can be sustained at high quality during the summer? What impact will YRO have on our non-resident/international students? As part of our impaction plan, should the campus require summer enrollment prior to their first term for freshman students requiring remediation?

MID-RANGE GOALS

1. Implement the short-range YRO plan for summer 2001 and until such time as we are able to implement long-range arrangements to manage YRO.
2. Develop a long-range plan for YRO with broad university consultation.
3. Develop a plan to provide appropriate compensation for department chairs and other personnel under YRO.

PLANNING AREA IV: QUALITY OF PROGRAMS AND SERVICES

ASSUMPTIONS

We can expect that enrollment growth will increase demands on all of our campus services and will increase workload for our faculty and staff. Our changing student mix has significant impacts on campus services and instructional programs. Maintaining the quality of our teaching-learning environment and services is vital to retaining our status as a "university of choice" for excellent students. Faculty scholarship and creative activity and staff professional development are critical to maintaining the quality of the educational environment. Significant numbers of faculty will retire in the planning period creating a challenge to maintain adequate staffing for our academic programs. We must ensure that adequate resources are available to replenish the ranks of the tenured and tenure-track faculty, as well as provide resources for continuous professional development of both the current and future CSULB faculty. We must also maintain

high quality advising and support staff, continuously improve the quality of classroom environments and the Library, and strengthen the institution's platform of information technology tools to support student learning. Meeting these needs will pose a significant planning and budgetary challenge to the University in a time when less additional state funding will be available. At all times, we must ensure that CSULB is a highly safe environment and that we are prepared for potential emergencies.

OPEN/UNDECIDED ISSUES

How will we maintain quality of instruction and services as enrollment grows rapidly? How will we support necessary programmatic growth and change, as state funding becomes less available? How should faculty workload be organized to balance service to students with scholarly and creative activities?

MID-RANGE GOALS

1. Implement a strategic plan for systematically increasing "tenure density" over the next three years to five years.
2. Identify resources needed to support faculty scholarship and to strengthen the research infrastructure in support of scholarly and creative activity.

PLANNING AREA V: QUALITY OF PHYSICAL ENVIRONMENT

Assumptions

We can expect that the construction of the four currently approved, major state capital projects (Renovate Fine Arts, New Science Building, Telecommunications Infrastructure, and Fire/Life Safety) will significantly impact the campus. We can further expect that enrollment growth will increase demands on all of our campus services and facilities. Our campus needs additional student housing; enrollment growth will exacerbate this shortage and our shortage of faculty office space, classrooms, labs, and support space. The California energy crisis will have a financial and operational impact on the campus.

OPEN/UNDECIDED ISSUES

How will we ensure fully efficient and appropriate utilization of campus instructional facilities and faculty and staff offices and workspaces? How will we maintain quality of services and the teaching-learning environment for students? Which of the identified alternatives will we select to develop new student housing? How will we ensure that CSULB will continue to be a highly safe environment and that we are prepared for emergencies at all times? How do we make energy conservation a permanent part of the campus culture?

MID-RANGE GOALS

1. Maintain the adequacy and quality of the physical environment, including classrooms and faculty and staff offices.
2. Conduct a comprehensive review of the campus physical master plan.
3. Accelerate the calendar for the allocation of instructional resources.

D7 Mid-Range Goals

4. Ensure adequate housing to meet the growing student demand.
5. Ensure that CSULB continues to be a highly safe environment free of violence, hostility, harassment, and discrimination; and that we are prepared for emergencies at all times.
6. Promote a major co-generation project for the campus under the Governor's recent budget message objectives.
7. Identify possible off-campus sites for non-instructional (e.g., research) programs.
8. Optimize the campus' ability to cope with the California energy crisis through aggressive conservation and energy efficient equipment, systems, and practices.

PLANNING AREA VI: COMMON MANAGEMENT SYSTEM

ASSUMPTIONS

The Common Management System (CMS) project will provide a state-of-the-art campus information system including modules for human resources, financials, and student administration. CMS will provide essential modernization of campus information systems. The cost and time commitment for CMS will affect other campus priorities. CSULB information users, working with their counterparts from other campuses within the CMS collaborative approach, will influence changes in campus practices that are necessitated by CMS. Vendor support for the current student administration system will become unavailable sometime in the next few years. CSULB has been notified it was not selected as a first wave campus for development of the Student Administration system. This will necessitate the campus explore other options.

OPEN/UNDECIDED ISSUES

How will we effectively utilize the benefits offered by CMS? How will we control and adjust to the substantial changes in campus practice necessitated by the collaborative approach of CMS? How will CMS affect our other priorities? What are the alternatives or options for student administration given the delay in CMS?

MID-RANGE GOALS

1. Attain substantial implementation of CMS Human Resources and Finance modules by the end of the three-year planning period.
2. Maximize the benefits obtainable from CMS by adopting best practices and maintaining a system-wide leadership position in the implementation process.
3. Communicate effectively with the campus community about CMS benefits and costs of implementation plans.
4. Find and implement a new student administration system that meets anticipated campus needs.

PLANNING AREA VII: ASSESSMENT, QUALITY, & ACCOUNTABILITY

ASSUMPTIONS

CSULB is committed to the enhancement of quality in all of our programs, activities and services. We will do everything necessary to ensure maintenance of regional accreditation and to meet standards for professional accreditation where applicable. The Trustees have adopted the Cornerstones Accountability initiative and formulated accountability measures for all campuses. The Cornerstones initiative includes a significant emphasis on assessment. The CSU will continue to encourage system-wide quality improvement initiatives. The campus will ensure compliance with Federal, State, and CSU requirements.

OPEN/UNDECIDED ISSUES

MID-RANGE GOALS

1. Complete a thoughtful campus review for the Western Association of Schools and Colleges resulting in full regional accreditation for the campus.
2. Track key indicators of quality of instruction and services as enrollment grows rapidly in the three-year planning period.
3. Encourage and support quality improvement programs in campus divisions and units based on respectively appropriate frameworks (e.g., academic assessment, program review, and balanced scorecard).
4. Begin to integrate, coordinate and share communication internally within the campus about quality improvement programs underway in respective campus divisions and units.
5. Continue the comprehensive communication strategy regarding assessment, quality and accountability for external constituents, including the Chancellor.

PLANNING AREA VIII: NON-STATE REVENUE

ASSUMPTIONS

We benefit from having a critical mass of faculty and staff members engaged in grant and contract work. Expanding our entrepreneurial activities in ways consistent with campus mission will bring benefits to the campus. Endowment enhancement is the next essential step in our development strategies. Success of development strategies will rely heavily upon enhancement of relationship building with our constituents.

OPEN/UNDECIDED ISSUES

How will we create a University climate that will motivate and encourage faculty and staff members to successfully engage in grant and contract work? How will we appropriately expand our entrepreneurial activities? How will we best advance our endowment efforts? How will we successfully broaden the support from more alumni, friends, parents, business and corporate sponsors in the life of the university? How will we secure funding to expand or maintain current efforts designed to enhance the university's image, including programs, alumni events,

publications and other media? How will the administration of the student scholarship programs be handled?

MID-RANGE GOALS

1. Develop and implement an incentive plan to support faculty and staff grant and contract activity.
2. Increase our focus on current students and their potential lifelong relationship with the university following graduation.
3. Broaden the revenue base of the CSULB Foundation.
4. Increase endowment-directed gifts substantially each year.
5. Expand contact with alumni through general and targeted publications, programs, services and on-line information.
6. In order to enhance the quality of our instructional services to the University's corporate, government, and professional constituents, support Continuing Education in development of a new Professional Education Facility.