President Paul Fitzgerald assigned AVP Peter Wilch to lead the strategic planning effort late Spring 2020. Interim Vice Provost Pamela Balls Organista teamed up with Peter, and together they serve as co-leads of the strategic planning initiative and committee.

During the summer 2020, Peter and Pamela fleshed out a tentative timeline and phases of the strategic planning process. During July 2020, members of the Core Strategic Planning Committee were recruited:

- Peter Wilch, Vice President, Development
- Pamela Balls Organista, Interim Vice Provost, Academic Affairs
- Tyrone Cannon, Interim Provost, Academic Affairs
- April Crabtree, AVP, Strategic Enrollment Management
- Eileen Fung, Senior Associate Dean, College of Arts and Sciences
- Michael Harrington, Director, CIPE
- Anneliese Mauch, AVP, OMC
- Joan McDermott, Director, Athletics
- Jeffrey Paller, Assistant Professor, College of Arts and Sciences
- Richard Stackman, Professor, School of Management
- Golden Venters, Associate Vice President, Student Life
- Sonja Martin Poole, Associate Professor, SOM & USFFA President

The strategic planning timeline and key objectives follow:

**Strategic Planning Timeline Phases**

**Phase 1 Establishing Parameters & Expectations** (Aug/Sep 2020)
- Ensure right mix of USF community representative participants in the planning process
- Set rules for process
- Preplanning Objectives—Core Planning Committee
  - Agree upon methodology and resources for internal and external data
  - Review recent campus planning initiatives to identify areas of strength and areas of weakness
  - Identify agreed upon structure for strategic plan (including guiding values, strategic priorities, and strategies—see illustration A and illustration B that provide a summary of work to date).
- Identify additional Strategic Planning Committee members
- Considerations:
  - Areas of relevant expertise (academic planning, academic governance, university budget, enrollment, student experience, facilities, philanthropy...)
  - A USF-first approach, minimization of self-interests
  - Demonstrated track record of campus collaboration
  - Strong work ethic or “can do” ethic
  - Reputation of efficiency and effectiveness
- Determine responsibilities and time expectations for the larger group
Phase 2 In-Community Conversation on the Plan and Drafting the Plan (Oct/Nov/Dec 2020)
- Hold community listening & discussion
- Report progress to Board of Trustees (BOT) December 2020 meeting
- Key outcomes:
  - Identify realistic and aspirational objectives
  - Detail financial, intellectual, and human resources required to achieve goals
  - Prioritization of opportunities and challenges
  - Timeline for achievement with clear metrics for success
  - Heightened specificity of identified objectives and named areas of the campus community who will be responsible for and held accountable for execution

Phase 3 Plan Review, Outcomes, and Execution (Jan/Feb/Mar/Apr 2021)
- Document measurable targets with clear timelines to meet objectives
- Map resource reallocation, investment, or revenue plans needed to meet outcomes
- Assign goals for achievement
- Map KPI measures of success & accountability
- Present to Board or Trustees (BOT) June 2021 meeting

Phase 4 Board of Trustees Approval & Community Adoption (May/Jun/Jul/Aug/Sep 2021)
- Publish written document
- Implement community roll-out
## Strategic Planning Timeline

<table>
<thead>
<tr>
<th>2020</th>
<th>2021</th>
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<tr>
<td>AUG</td>
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### Establishing Parameters & Expectations
- Ensure right mix of USF community representative participants in the planning process
- Set rules for process
- Identify additional committee members

### In-Community Conversation on the Plan
- Hold community listening and discussion
- Report progress to Board of Trustees (BOT) December 2020 meeting

### Plan Review, Outcomes, & Execution
- Document measurable targets with clear timelines to meet objectives
- Map resource reallocation, investment, or revenue plans needed to meet outcomes
- Assign goals for achievement
- Map KPI measures of success and accountability
- Present to Board or Trustees (BOT) June 2021 meeting

### Board of Trustees Approval and Community Adoption
- Publish written document
- Implement community roll-out
Abbreviated Version (see page 2 for expanded version with descriptions)

1. Inspired by the Cascade Model at execustrategy.net.
Expanded Version

USF Vision

Currently:

“The University of San Francisco will be internationally recognized as a premier Jesuit Catholic, urban university with a global perspective that educates leaders who will fashion a more humane and just world.”

Guiding Values of Strategic Plan

Qualities that guide the decisions and behaviors that inform the plan & support USF’s Vision & Mission. We are currently honing:

<table>
<thead>
<tr>
<th>Core Jesuit Values</th>
<th>Diversity, Equity &amp; Inclusion</th>
<th>Global Focus &amp; Responsibility</th>
<th>Community-Rooted</th>
<th>Resilience &amp; Readiness</th>
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<tr>
<td></td>
<td></td>
<td>[SF Location in place and mind]</td>
<td>[Citizenship, Environment]</td>
<td>[through innovation, experimentation / think as though there is no box, sound decision-making]</td>
</tr>
</tbody>
</table>

Strategic Priorities

Areas of focus identified as highly important to develop strategies for improvement or achievement in. Should reflect values and support realization of vision & mission. These are packaged in short descriptions. Examples we are currently honing down include:

- Academic Excellence & Innovation
- Student Experience & Success
- Faculty & Staff Experience & Success
- Culture & Communication
- Engaging Alumni & Extending Our Outreach
- Sustained Institutional Financial Health
- Infrastructure [Physical & Technological]

Strategies

Specific statements of what you want each strategic priority to achieve including the target time period for achievement. Each priority should have at least one strategy.

Strategy Projects

Exactly how each strategy will be achieved. Projects describe the specific tasks, who is responsible for completion of tasks, and when tasks should be completed. Each strategy has strategic projects outlined for them.

Key Performance Indicators (KPI’s)

Measurements of success for each strategy; Best written using the SMART model (specific, measurable, achievable, time-bound)
MISSION
Promote learning in the Jesuit Catholic tradition

JESUIT | Magis, Cura Personalis, Cura Apostolica, etc.

DIVERSITY, EQUITY, & INCLUSION | Fair/Just/Equitable/Inclusive

GLOBALLY FOCUSED & RESPONSIBLE | Citizenship/Environment

COMMUNITY ROOTED | San Francisco Location in Place and Mind

RESILIENCE & READINESS | Magis, Cura Personalis, Cura Apostolica, etc.