



**California State University, San Bernardino
Santos Manuel Student Union Board of Directors
Strategic Planning Committee
Wednesday, December 17, 2025
4:00 p.m. – SMSU North Chambers
Agenda**

Call to Order
Roll Call
Approval of Minutes from October 28, 2025
Open Forum
Adoption of Agenda

Old Business:

SP 04/26 Review Model Strategic Plans from Industry Leaders (Informational, Bustillos)

New Business:

SP 06/26 Mission/Vision rework (Discussion, Paz)

SP 07/26 Creating a solution-based culture (Discussion, Paz)

SP 08/26 Discuss NASPA Review Executive Summary (Informational, Bustillos)

SP 09/26 Review Milestones and Action Plan (Informational, Del Rossi)

Announcements

Adjournment



**California State University, San Bernardino
Santos Manuel Student Union Board of Directors
Strategic Planning Committee Meeting
Friday, Tuesday, October 28, 2025
Minutes**

Members Present: Jasmine Bustillos, Benjamin Fejzic, Sophia Garcia, Edgar Lopez, Jocelyn Paz, Robinpreet Waraich

Members Absent: Anjali, Cintiantl Rangel-Canseco

Staff Present: Vilayat Del Rossi, Elizabeth Junker

Guests Present: None

Call to Order: The meeting was called to order at 12:03p.m.

Roll Call: A verbal roll call of attendees was conducted. Quorum was confirmed.

Approval of Minutes:

M/S Lopez/Garcia; motion to approve March 16, 2018 meeting minutes.
Motion passed

Open Forum: No guest present for open forum.

Adoption of Agenda:

M/S Paz/Waraich; motion to approve agenda as presented. The agenda was approved by consensus.

SP 01/26 Election of Committee Chair (Action, Del Rossi)

M/S Paz/Garcia; motion to open SP 01/26 Election of Committee Chair.

Mr. Del Rossi provided an overview of the responsibilities of the Strategic Planning Committee and the role of its chair, noting that the committee will meet regularly throughout the strategic planning cycle and support program evaluation and long-term organizational planning. He

invited nominations for a student chair, emphasizing consistency with other SMSU committees. After questions regarding meeting frequency and committee expectations, Jocelyn Paz was nominated and accepted the nomination, with discussion affirming the value of her prior leadership experience. Members also expressed interest in exploring a future transition of the chair role to newer student leaders later in the academic year. A vote was then taken to appoint Ms. Paz as chair.

VOTE: 4 - In-Favor 0 – Oppose 1- Abstention
Motion passed.

Jasmine passed the gavel to Ms. Paz at 12:15pm.

SP 02/26 Review history and context for past Strategic Plan (Information, Bustillos)

M/S Lopez/Waraich; motion to open SP 02/26 Review history and context for past Strategic Plan.

Jasmine Bustillos presented background on the organization's strategic planning efforts, noting that the most recent board-approved strategic plan dates back to 2014. Key organizational changes—such as the full integration of SMSU and Recreation & Wellness and evolving divisional priorities—delayed efforts to adopt a new plan. While a revised mission and goals were developed in 2018, measurable outcomes and a formal strategic plan were not implemented due to division leadership transitions and the pandemic. The organization has since adopted the "Achieve, Connect, Thrive" framework for program-level assessment. With university and CSU system-wide strategic plans now complete, the committee will begin its strategic planning process in earnest, aligning with broader institutional goals while addressing local priorities, including the Palm Desert Campus. Members emphasized the need for a guiding document to support long-term decision-making, shared historical context, and expressed a desire to review the university's plan in a future meeting.

SP 03/26 Review Strategic Planning input documents (Informational, Del Rossi)

M/S Waraich/Garcia; motion to open SP 03/26 Review Strategic Planning input documents.

Mr. Del Rossi provided an overview of the source documents that will guide the committee's strategic planning work, referencing materials included in pages 11–35 of the packet. These documents include synthesized themes from the summer full-time staff retreat, preliminary findings from the NASPA external review, a strengths-weaknesses-gaps analysis aligned with industry standards (CAS, ACUI, NIRSA), priority recommendations, board-established goal themes, SMSU's assessment framework (Achieve–Connect–Thrive), and results from the ongoing staff culture assessment series. He explained that the finalized NASPA report and executive summary will be brought to the Board in December. Committee members discussed the utility of having these materials early to inform evidence-based decision-making and requested future review of the University's strategic plan. Additional context was provided regarding the timing of the NASPA review and the importance of aligning future SMSU strategic planning with university, divisional, and CSU system-wide priorities.

SP 04/26 Review Model Strategic Plans for Industry Leaders (Informational, Bustillos)

M/S Waraich/Garcia; motion to open SP 04/26 Review Model Strategic Plans for Industry Leaders.

Jasmine Bustillos presented sample strategic plans from peer auxiliary and student union organizations, including Cal Poly Partners, CSU Fullerton Auxiliary Services Corporation, and ASI at Cal Poly San Luis Obispo. Each plan demonstrated effective practices, such as clear pillars linked to operations, time-bound goals with reporting cadences, and accessible formats supporting transparency and alignment. The committee briefly reviewed highlights and discussed using these examples as reference points in drafting SMSU's strategic plan. Members were encouraged to review the linked plans independently and revisit any items of interest in future meetings.

SP 05/26 Review Strategic Plan Implementation timeline (Informational, Bustillos)

M/S Waraich/Garcia; motion to open SP 05/26 Review Strategic Plan Implementation timeline.

Jasmine Bustillos presented a proposed timeline for the development and implementation of a new five-year strategic plan for SMSU and Recreation & Wellness, aimed at aligning with institutional priorities and ensuring sustainable impact. The timeline includes four phases: (1) Discovery and Foundation (in progress, to conclude with a summary report, SOAR analysis, and revised mission/vision/values by end of Fall 2025); (2) Drafting the Strategic Framework (Fall 2025–Spring 2026); (3) Validation and Board Approval (Fall 2026); and (4) Implementation and Monitoring (2026–2031). Committee members raised concerns about the accelerated timeline given the volume of assessment data, institutional changes, and student engagement needs. It was clarified that foundational work is already underway, and the timeline can be adjusted as needed. The committee expressed enthusiasm for the initiative and its potential to shape student-centered outcomes.

Announcements:

No announcements from committee members.

Adjournment: The meeting was adjourned at 1:05 p.m.

Minutes approved by:

Jocelyn Paz, Chair, Strategic Planning Committee

Date



Model Strategic Plans from Industry Leaders

[Cal Poly Partners](#): Cal Poly San Luis Obispo's nonprofit auxiliary running commercial services, sponsored programs, and housing initiatives.

- Clear, memorable pillars mapped to operational levers – “Purpose” (Services), “People” (Workforce), and “Perform” (Financial Stewardship)
- [Transparent articulation](#) of auxiliary scope post-rebrand

[CSU Fullerton's Auxiliary Services Corporation](#): a non-profit organization aimed at supporting the educational mission of California State University, Fullerton.

- Time bound goals paired with measures and reporting cadence right in the plan.

[Cal Poly SLO ASI](#): a private non-profit auxiliary organization at Cal Poly. One, corporate, legal entity responsible for the administration and oversight of all state-of-the-art managed facilities, programs, and services funded with University Union and ASI student mandatory fees.

- Straightforward strategy-to-action line of sight for student leaders and staff
- Public, narrative progress updates by year to sustain momentum and trust.

[CSU Fullerton ASI](#): A 501 (C)3 nonprofit corporation, operating as an auxiliary organization and the student government of CSU Fullerton and providing student governance, shared governance of the university, programming of student activities, funding of campus organizations and athletics, and the operation of a nationally accredited child development center. The Associated Students provides student development opportunities through leadership, volunteer, and employment experiences. In addition, the Associated Students provides campus community members with important social, cultural, and recreational opportunities, as well as, a wide range of programs and services. The Associated Students encourages and supports the activities of all CSU Fullerton recognized student organizations whose activities stimulate individual and group participation within the university community.

- Clear goals with audiences and partners identified; easy to cascade to departments.



Executive Summary: NASPA External Review Findings and Strategic Response

Introduction

The NASPA External Review Team conducted a comprehensive evaluation of the Santos Manuel Student Union and Recreation & Wellness Dept. (collectively “SMSU”) at California State University, San Bernardino, focusing on organizational effectiveness, culture, governance, and alignment with best practices in Student Affairs administration.

The review recognized SMSU as a vital, student-centered organization with a demonstrated commitment to inclusion, holistic wellbeing, and service to the CSUSB community. It also identified opportunities to strengthen structural clarity, internal communication, assessment integration, and long-term sustainability.

This executive summary synthesizes the review’s core findings and outlines SMSU’s immediate, short-term, and strategic responses now in motion or being incorporated into the upcoming 2026–2030 Strategic Plan.

Summary of Key Findings

1. Organizational Clarity and Leadership Alignment

The review identified a need for greater clarity around roles, responsibilities, and communication across all levels of the organization. While the Board of Directors and leadership demonstrate commitment to SMSU’s mission, staff expressed uncertainty around decision-making processes and strategic priorities. The review identified a need to establish a single, portfolio-wide “north star” that unites SMSU and RecWell, clarifying shared values and how each unit contributes to CSUSB’s strategic goals, noting that the current mission is not consistently experienced across units and should be refreshed for a post-COVID context.

Key insights:

- Governance and management roles sometimes overlap, leading to role confusion and inconsistent accountability.
- Leadership transitions have created both challenges and opportunities to reset expectations and strengthen culture.
- Staff seek clearer communication channels and consistent direction from senior leadership to align day-to-day work with organizational goals.
- A unified purpose and underlying values would clarify core functions and inform day-to-day decisions.

Opportunity: Establish transparent decision-making systems, consistent communication pathways, and shared leadership frameworks that foster accountability and trust with shared purpose.

2. Organizational Culture and Staff Wellbeing

Staff consistently articulated a deep sense of care, commitment, and purpose in serving students. However, they also reported symptoms of burnout, limited professional growth opportunities, and role overload in certain functional areas.

Key insights:

- Workload imbalances and unclear role scopes contribute to fatigue and morale challenges.
- Recognition systems are inconsistent and often informal, limiting opportunities to celebrate contributions.
- Staff expressed a desire to rebuild a culture of trust, reflection, and mutual respect.
- Student employment and leadership development is a clear strength for the organization with 96% of student staff reported gaining tangible professional/leadership skills.
- Board training is robust and engagement is high.

Opportunity: Establish a healthy, sustainable work culture that balances performance expectations with personal wellbeing and development. Assist student employees connect their individual roles to the organization's broader mission, and assess what non-employee students are learning through programs.

3. Assessment and Strategic Integration

The review recognized that while SMSU collects meaningful program and participation data, there is no consistent framework for assessment and continuous improvement across departments. Data-driven decision-making is fragmented, with limited integration between assessment, budget planning, and strategic priorities.

Key insights:

- Assessment practices vary by unit and are not consistently tied to outcomes or resource allocation.
- Institutional partnerships (e.g., with Institutional Research) are promising but underutilized.
- There is potential for improved integration between data visualization platforms (Power BI, Tableau) to enhance decision-making and transparency.

Opportunity: Develop a unified assessment framework that aligns data collection, evaluation, and reporting with strategic planning and fiscal decision-making.

4. Governance, Policy, and Compliance

The NASPA team acknowledged SMSU's positive relationship with the Board of Directors and the CSU system but recommended strengthening governance literacy and documentation practices. While policy and compliance adherence are largely sound, visibility into these structures could be enhanced.

Key Insights:

- Board members would benefit from clearer onboarding, training, and engagement in strategic oversight.
- Policy frameworks and CSU auxiliary compliance processes need greater documentation and accessibility.
- Strengthened reporting and communication between the Board and staff would enhance transparency and shared accountability.

Opportunity: Clarify the distinction between governance and management roles, update policy frameworks, and institutionalize Board education and compliance reporting.

5. Facilities, Finance, and Operational Sustainability

The SMSU facilities highly visible hubs of campus life, with student engagement and event demand increasing post-pandemic. However, long-term sustainability will depend on balancing space usage, staffing models, fiscal practices and priorities.

Key Insights:

- Space utilization, maintenance, and modernization need to align with student expectations for flexibility, technology, and inclusivity.
- Staffing structures must be reviewed to ensure operational efficiency and equitable workload distribution.
- Budget processes could be better linked to strategic priorities, assessment outcomes, and sustainability planning.

Opportunity: Create a facilities and resource plan that integrates physical, financial, and human resources in support of long-term operational balance.

Immediate and Ongoing Actions

SMSU leadership has already begun addressing several areas identified in the NASPA review. The following actions are currently underway:

- **Culture & Staff Development:** Continuing learning block sessions that focus on organizational values, vision, and mission, which will align with daily expectations. Process assists in finding our “north star”.
 - **Workforce Review:** A comprehensive workforce and staffing review is underway to address role balance, succession planning, and sustainability.
 - **Governance and Policy Revision:** Updates to the Reserve Fund Policy, budget process/guidelines, and HR practices are advancing to strengthen CSU auxiliary compliance and financial transparency.
 - **NASPA Review Debriefing:** Moderated discussions with staff, Board, and divisional leadership have been held to promote open dialogue and collective understanding of review findings.
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Short-Term Actions (6–12 Months)

In the next year, SMSU will prioritize targeted initiatives that bridge review recommendations and strategic planning implementation:

- **Mission, Culture, and Governance:** Co-create a unified mission, vision, and values statement that clarifies SMSU’s purpose and Palm Desert’s role; strengthen leadership and Board onboarding, and advance professional development, wellness, and JEDI initiatives to deepen trust and accountability
- **Communication, Collaboration, and Planning:** Establish a streamlined communication and planning framework through monthly leadership forums, shared goal-alignment tools, and a collaborative platform; refresh websites and conduct campus engagement efforts to enhance visibility and shared understanding.
- **Assessment, Learning, and Student Experience:** Expand learning and engagement assessment to include student outcomes, implement service-level agreements and user feedback systems, and promote equitable performance review and professional development processes.

- **Facilities, Finance, and Transparency:** Launch a Facilities Master Plan, align event pricing and facility use with recruitment goals, strengthen financial transparency through “Budget Basics” visuals and annotated audits, and expand data integration and revenue generation initiatives.
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Strategic Plan Integration (2026–2030 Cycle)

The findings from the NASPA review are shaping the structure and themes of the next SMSU Strategic Plan, ensuring that future goals directly address organizational needs and align with CSUSB priorities.

Strategic Themes for Integration

1. **Facility Vision and Student Engagement**
 - Develop a long-term facilities and space plan that aligns student needs, sustainability, and fiscal health.
 - Promote inclusive, technology-enabled, and flexible environments that enhance belonging and engagement
 2. **Sustainable People and Culture**
 - Prioritize staff wellbeing, professional development, and equitable workload distribution.
 - Embed shared values into performance evaluation, recognition, and hiring practices.
 3. **Integrated Assessment and Decision-Making**
 - Establish data-informed planning processes that connect assessment to budgeting and staffing decisions.
 - Utilize dashboard integration (Power BI/Tableau) for transparency and strategic accountability.
 4. **Governance and Compliance Excellence**
 - Institutionalize robust policy management and documentation systems.
 - Strengthen Board engagement and training in governance best practices and CSU auxiliary requirements.
 5. **Values-Driven Leadership and Service**
 - Operationalize SMSU’s core values in leadership expectations, professional standards, and service delivery.
 - Reinforce purpose-driven work as central to student and staff success.
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Conclusion

The NASPA External Review reaffirmed that SMSU’s most significant strength is its people, a community of professionals and student leaders deeply committed to service, integrity, and student success. The organization now stands at a pivotal juncture: one that demands renewed clarity, cultural alignment, and sustainable practices to support its long-term mission.

Through focused leadership transitions, workforce realignment, and strategic integration, SMSU is moving decisively to:

- Build a culture grounded in trust, balance, and shared purpose.
- Institutionalize data-driven decision-making and compliance excellence.
- Ensure that every operational and strategic decision reflects SMSU’s enduring commitment to student wellbeing and collective growth.

The forthcoming strategic plan will formalize these efforts, providing a roadmap for organizational sustainability, cultural renewal, and continued excellence in student engagement and leadership development.



Purpose

To develop and launch a five-year strategic plan that reflects the organization's growth, integrates both the Santos Manuel Student Union and the Recreation and Wellness Center, and aligns with the university's priorities. The process will ensure broad stakeholder engagement, data-informed decision-making, and an implementation framework for sustainable impact.

Phase 1: Discovery & Foundation (Summer 2025 – Fall 2025)

Goal: Build a shared understanding of the organization's current landscape and future opportunities.

Key Activities:

- Review Program Review Report findings, Culture, Development, and Strategic Planning Assessment, AAA Staff Retreat Outputs, and Staff Values.
- Review industry leader strategic plans
- Analyze Board of Directors objectives and Division of Student Affairs strategic directions.
- Conduct stakeholder listening sessions (students, staff, campus partners).
- Facilitate Strategic Planning Committee retreats to identify key themes.
- Draft revised mission, vision, and values.

Deliverables:

- Discovery Summary Report
 - SWOT/PESTLE or SOAR Analysis
 - Draft Mission, Vision, and Values
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Phase 2: Drafting the Strategic Framework (Fall 2025 – Spring 2026)

Goal: Translate discovery insights into strategic priorities, goals, and measurable objectives.

Key Activities:

- Develop 3–5 strategic priority areas.
- Define objectives, outcomes, and indicators for success.
- Draft strategic framework and narrative.
- Solicit feedback from internal and external stakeholders.
- Align framework with campus and divisional goals.

Deliverables:

- Draft Strategic Framework
 - Stakeholder Feedback Summary
 - Revised Mission and Vision Statements
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Phase 3: Validation & Approval (Spring – Fall 2026)

Goal: Secure consensus and formal approval from all governing bodies.

Key Activities:

- Conduct open review period and integrate community feedback.
- Finalize goals, metrics, and implementation plan.
- Present final plan to Board of Directors for approval.

Deliverables:

- Final Approved Strategic Plan
 - Implementation Framework Outline
 - Executive Summary for Communication
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Phase 4: Implementation Planning & Rollout (Summer – Fall 2026)

Goal: Operationalize the plan and prepare for official launch.

Key Activities:

- Establish Implementation Teams by strategic priority area.
- Develop Year 1 Action Plans with measurable deliverables.
- Integrate strategic goals into departmental objectives.
- Launch internal communications and rollout campaign.

Deliverables:

- Year 1 Implementation Plan
 - Launch Campaign and Communications Toolkit
 - Baseline Performance Dashboard
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Phase 5: Continuous Monitoring & Improvement (2026–2030)

Goal: Sustain momentum and ensure accountability through ongoing evaluation.

Key Activities:

- Annual progress reviews and BOD reporting.

- Mid-cycle review (by 2029) to adjust for emerging priorities.
- Integrate results into annual budget and assessment cycles.

Deliverables:

- Annual Progress Reports
- Mid-Cycle Strategic Refresh (2029)
- Final Strategic Impact Report (2031)

High-Level Timeline Overview

Phase	Focus	Timeframe	Key Deliverables
1	Discovery & Foundation	Summer – Fall 2025	Discovery Report, Draft Mission/Vision
2	Drafting Framework	Fall 2025 – Spring 2026	Draft Plan, Feedback Summary
3	Validation & Approval	Spring – Fall 2026	Final Plan, Implementation Framework
4	Implementation & Rollout	Summer – Fall 2026	Year 1 Plan, Launch Event
5	Monitoring & Improvement	2026–2031	Annual Reports, Mid-Cycle Review

Overview

This roadmap outlines a deliberate and inclusive approach to developing the Santos Manuel Student Union, inclusive of the SMSU and Recreation and Wellness, five-year strategic plan. Beginning with data-informed discovery and stakeholder engagement, the process will move through structured drafting, validation, and implementation phases. The timeline accounts for governance processes, student leadership transitions, and alignment with university objectives. By Fall 2026, the organization will be positioned to launch a comprehensive, actionable, and measurable strategic plan that sets the foundation for growth and continuous improvement through 2031.