California State University, San Bernardino
Santos Manuel Student Union Board of Directors
Strategic Planning Committee
Thursday, February 5, 2026 | 12:00 p.m.
SMSU North Chambers (SUN-3305)
Zoom: https://csusb.zoom.us/j/86369690025

Agenda

Call to Order
Roll Call
Approval of Minutes from January 13, 2026
Open Forum
Adoption of Agenda

Old Business

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
Tuesday, January 13, 2026
Student Chambers (SUN-3305)

Minutes

Members Present: Anjali, Jasmine Bustillos, Benjamin Fejzic, Jocelyn Paz, Michael Rister

Members Absent: Sophia Garcia, Edgar Lopez, Robinpreet Waraich

Staff Present: Elizabeth Junker

Call to Order: The meeting was called to order at 12:05p.m.

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

Approval of Minutes:

M/S Bustillos/Anjali; motion to approve December 17, 2025 meeting minutes.
Motion passed

Open Forum: No guest present for open forum.

Adoption of Agenda:

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

Old Business:

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

M/S Bustillos/Fejzic; motion to open SP 08/26 Discuss NASPA Review Executive Summary.

The committee received a presentation Jasmine Bustillos, Assessment, Research and Training Specialist on the external review executive summary, which identified key strengths and areas for improvement across SMSU and RecWell. Ten core themes were shared, including the need for unified mission alignment, better strategic coordination of programs, clearer communication

practices, and stronger integration of DEI (JEDI) efforts. While student employment and leadership development were identified as organizational strengths, opportunities exist to improve assessment for non-employee participants, modernize technology systems, and increase financial transparency.

The committee also discussed the importance of refreshing the website to better serve students' expectations for accessible digital information and promoting awareness of space rentals. Suggestions were made to engage general student population more consistently through surveys and student board involvement. Staff emphasized aligning future planning efforts with the CSU and campus strategic plans and improving data collection cycles to ensure student input informs decision-making, particularly regarding facilities, equipment, and programming. Feedback highlighted a need to balance strategic flexibility with long-term planning, particularly as it relates to staff roles, operational priorities, and student engagement post-pandemic.

SP 09/29   Review Milestones and Action Plan (Informational, Del Rossi)

M/S Bustillos/Fejzic; motion to open SP 09/29 Review Milestones and Action Plan.

The committee received an update from Jasmine Bustillos on the SMSU/RecWell strategic planning process. Phase 1 (Discovery and Foundation) is nearing completion, which included the external review, stakeholder input, and development of draft mission, vision, and values. The team will next begin drafting the strategic framework, narrowing ten thematic areas into 3–5 strategic priorities with supporting goals and objectives. A draft version is expected by early March 2026.

Once the Strategic Planning Committee finalizes a working draft, it will be shared with the Board of Directors for review and potential approval. The Board may request revisions before final adoption. Student employee input is being incorporated throughout the process, including during student training sessions. Broader student engagement is also planned. While the tentative launch date remains Fall 2026, staff confirmed the timeline is flexible and may be adjusted to ensure a meaningful and inclusive strategic plan.

Announcements:
No announcements from committee members.

Adjournment: The meeting was adjourned at 12:50 p.m.

Minutes approved by:

_____   _____
Jocelyn Paz, Chair, Strategic Planning Committee   Date

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

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

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

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

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

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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.

Overarching Organizational Core Values

1. Integrity

Key Ideas: honesty, reliability, follow-through, responsibility, moral principles
Pulls From Posters: trust, honesty, justice, respect, professionalism, accountability

2. Compassion

Key Ideas: empathy, care, kindness, emotional maturity, advocacy
Pulls From Posters: empathy, kindness, compassion, faith, advocacy, "seek to understand"

3. Respect

Key Ideas: honoring others, boundaries, dignity, fairness, moral grounding
Pulls From Posters: respect, freedom, honoring others, valuing differences, rights & morals

4. Service

Key Ideas: purpose, contribution, work ethic, helping others, mission-driven action
Pulls From Posters: service, work, responsibility, leadership, achievement, wisdom

5. Growth

Key Ideas: learning, self-improvement, curiosity, knowledge, emotional maturity
Pulls From Posters: self-growth, knowledge, emotional maturity, wisdom, independence

6. Balance

Key Ideas: wellbeing, sustainability, healthy rhythms, adventure, groundedness
Pulls From Posters: wellbeing, adventure, maintaining balance, self-growth, holistic perspective

7. Connection

Key Ideas: relationships, community, belonging, gratitude, collaboration
Pulls From Posters: family, community, connection, gratitude, humor, celebration, collaboration

8. Justice

Key Ideas: equity, fairness, advocacy, rights, moral responsibility
Pulls From Posters: rights & morals, equity, advocacy, justice, DEI principles

Thematic Summary & Categorized Analysis

Value	Core Concepts	Representative Values / Notes from Posters
Integrity	Honesty, accountability, moral grounding, reliability	Honesty, trust, justice, professionalism, responsibility, follow-through
Compassion	Empathy, kindness, emotional attunement, advocating for others	Kindness, compassion, advocacy, faith, "seek to understand," empathy

Value	Core Concepts	Representative Values / Notes from Posters
Respect	Dignity, fairness, honoring differences, healthy boundaries	Respect, freedom, fairness, moral rights, honoring others
Service	Purposeful work, contribution, dedication to others	Service, work, responsibility, leadership, achievement, wisdom
Growth	Learning, personal development, curiosity, emotional maturity	Self-growth, knowledge, wisdom, independence, achievement
Balance	Wellbeing, stability, healthy work-life rhythms	Wellbeing, adventure, maintaining balance, holistic wellbeing
Connection	Community, belonging, relationship-building, gratitude	Family, community, collaboration, celebration, humor, connection
Justice	Equity, advocacy, doing what's right, empowering others	Rights and morals, DEI, justice, advocacy, fairness

Core Values with Full Value Statements

1. Integrity
We act with honesty and responsibility, ensuring our decisions and actions align with our moral principles. We follow through on commitments and build trust through consistency and accountability.

2. Compassion
We lead with empathy, kindness, and understanding. By caring for others and advocating when needed, we create a supportive environment where people feel valued and seen.

3. Respect
We honor the dignity, boundaries, and perspectives of every person. We approach one another with fairness and openness, recognizing the inherent worth of all individuals.

4. Service
We find purpose in contributing to the greater good. Through dedication, leadership, and a commitment to helping others, we bring our mission to life in meaningful ways.

5. Growth
We strive for ongoing personal and professional development. By embracing learning, curiosity, and reflection, we strengthen both ourselves and our community.

6. Balance
We prioritize wellbeing and sustainability in how we work and live. By cultivating healthy rhythms and nurturing holistic health, we support long-term success and wholeness.

7. Connection
We build community through authentic relationships, collaboration, and gratitude. We celebrate one another and foster a culture where all can belong and contribute.

8. Justice
We stand for fairness, equity, and what is right. Through advocacy and principled action, we work to ensure dignity and opportunity for all.

Shared Leadership Language — Core Themes

1. Trust

Leadership builds confidence and psychological safety through consistency, care, and reliability.

Drawn from: trust, transparency/trust, safety, centered/aligned, authentic

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2. Transparency

Leadership communicates openly and clearly, making decisions, processes, and direction visible.

Drawn from: transparency, transparency/trust, audit/naming roadblocks & flow, clear priorities with follow-through

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3. Holistic Wellness

Leadership honors the whole person and supports sustainable wellbeing, balance, and healthy boundaries.

Drawn from: holistic wellness, balance, centered/aligned, wellness, sustainability.

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4. Accountability

Leadership is reliable and action-oriented, pairing compassion with execution and collective responsibility.

Drawn from: follow-through, execution, accountability, integrity, initiative.

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5. Collaboration

Leadership fosters partnership, connection, and a strong sense of belonging through shared work and mutual respect.

Drawn from: collaboration, partnership, connection, community, belonging.

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6. Equitable Care

Leadership is human-centered and compassionate, meeting people with understanding and care while advancing fairness, equity, and safety, ensuring people feel protected, respected, and valued.

Drawn from: empathy, compassion (with grace), authentic/relatable, create a sense of belonging, justice, equity, equality, safety, integrity, representation.

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7. Growth

Leadership is future-focused and growth-oriented, encouraging innovation, learning, and collective progress.

Drawn from: envision the future, growth in all ways, innovation, continued education.

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8. Excellence

Leadership models confidence, skill, and service excellence—showing up prepared, capable, and committed.

Drawn from: competent, service excellence, leadership, professionalism, "badass."

Sustainability Themes — Cross-Group Synthesis

These themes reflect what staff identified as:

- Most energizing and sustainable
- Most draining or unsustainable
- Necessary to improve balance and longevity

Theme 1: Clarity of Priorities, Expectations, and Follow-Through

Sustainability increases when work expectations are clear, priorities are realistic, and commitments are consistently followed through.

Pulled directly from group language:

- Clear priorities with follow-through
- Defining work expectations
- Naming "this is how we've always done it"
- Continue discussion + follow-through lists
- Understanding limitations

Why this matters:
Unclear or shifting expectations drain energy. Staff experience sustainability when they know **what matters most**, **what can wait**, and **what will actually be completed**.

Theme 2: Balanced Workload and Capacity Awareness

Work feels sustainable when workload is intentionally divided and organizational limits are acknowledged.

Pulled directly from group language:

- Dividing workload / addressing burnout
- Understanding limitations
- Capacity awareness
- Flexible work schedules

Why this matters:
Burnout is not an individual failure — it is a systems issue. Sustainability requires honest conversations about **how much work exists** and **how it is distributed**.

Theme 3: Supportive Structures and Standardized Processes

Sustainability is strengthened through clear, consistent systems that reduce friction and inefficiency.

Pulled directly from group language:

- Standardized processes / assessments
- Auditing roadblocks and flow
- Defining "how we do things"
- Strategic planning committees / working groups

Why this matters;
When systems are unclear or constantly reinvented, staff energy is drained. Structure supports sustainability by creating predictability and efficiency.

Theme 4: Time for Reflection and Re-Evaluation

Sustainable work requires protected time to pause, reflect, and intentionally adjust practices.

Pulled directly from group language:

- Time for reflection
- Reflection to make actual & sustainable changes
- Dedicated time to revisit
- Continue discussion

Why this matters:
Without reflection, teams stay stuck in reactive cycles. Reflection is not a luxury — it is essential for meaningful, lasting change.

Theme 5: Collaboration, Role Clarity, and Shared Learning

Sustainability grows when people understand their roles, collaborate intentionally, and learn together.

Pulled directly from group language:

- Commitment to collaboration
- Understanding our roles to grow
- Understanding roles to better serve student success
- Trainings, workshops, co-work/collaboration
- Cross-training for coverage

Why this matters;
Sustainability is relational. Clear roles, shared learning, and collaboration reduce isolation and increase resilience across the team.

High-Level Synthesis

Across the group exercise, staff consistently named sustainability as:

- **Structural** (systems, processes, priorities)
- **Relational** (collaboration, shared responsibility)
- **Reflective** (time to pause, reassess, and adjust)
- **Realistic** (honest limits and capacity awareness)

Importantly, staff are not asking to *do less meaningful work* — they are asking for **conditions that allow meaningful work to be sustained over time**.