



BATISTA CONSULTING SERVICES
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Cal State Fullerton

Division of Student Affairs

Strategic Planning Overview

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Overview of Strategic Planning Readiness and Process

Strategic planning is an important part of any successful organization.

A good strategic plan ensures that the organization is prepared for the future and can launch initiatives that will help it reach its goals.



Batista Approach for Assessing Organizational Readiness



Gather Information

Research the current state of the organization and its goals



Analyze Data

Evaluate the data to identify strengths and areas of improvement



Develop Plan

Partner with the organization to create strategic goals, objectives and initiatives

By applying a DEIB (Diversity, Equity, Inclusion & Belonging) lens to this process, organizations can assess their level of readiness and launch a successful planning process.



Strategic Planning **Elements**

Identity and Purpose

- ★ Vision
- ★ Mission
- ★ Purpose
- ★ Core Values

Strategy

- ★ 3-5 Goals

Tactics

- ★ 3-5 Goals

Activities

- ★ Specific initiatives to accomplish each objective.



Opportunities for **Stakeholder Engagement**

- 1 Individual and Team Coaching.
- 2 Team Development, Learning & Readiness.
- 3 Discovery Meetings.
- 4 Collection of Points of Pride & Strengths and Opportunities.
- 5 Organizational Assessment Process.
- 6 Virtual/in-person Focus Groups.
- 7 Observations and Recommendations Report.
- 8 Student Learning Domains or Curriculum Map.
- 9 Vision & Mission Working Group.
- 10 Strategic Goals and Metrics Development Committee.

Phased Implementation Timeline



Batista Consulting Services, LLC

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