

“For me, the whole process was just to get us to focus more. We value our staff, we value our residents, we value our diversity, we value our sustainability...now what are we going to do about it? Actually coming up with a plan, stating it and measuring it, this helps us to focus for the next 10 years.”

Peter Chu
Student Leadership Coordinator

“A strategic plan is wonderful, but without students it’s meaningless! We’re all investors, and all investors need to be included.”

Jack Huthsing
Lead Laborer

“Having students there planning with us was the critical piece, their contributions were invaluable. They talked about their experiences and what they valued the most about their housing experience. Where I got excited was the connection piece—the people that you meet now are the people you’ll still be friends with in 20 years!”

Miki Swick
Conferences Services Director

“The process was very informative because I got to learn about where H&RS has been and where we plan to go with it in the future. It was a hands-on experience with people who are truly invested in the betterment of our campus!”


Charlie Arreola
RHA President 2008-2009



2020 VISION

THE BEST HOUSING EXPERIENCE

The UCSB Housing & Residential Services 2008 Strategic Plan



*I am pleased to share with you Housing & Residential Services' Strategic Plan **2020 Vision: The Best Housing Experience**. This plan provides us with the opportunity to focus and build upon our strengths as an organization to reach the next level. In creating this plan, we partnered with internal representatives from every level, with student residents, and with campus stakeholders. We used a research-based Appreciative Inquiry process, whereby people collect information and examine an organization's strengths, and then move forward by redirecting focus to those core strengths. We had the opportunity to build upon our 1998 Strategic Plan by revisiting those visions, celebrating our successes, and re-focusing on the next steps to be the Best Housing Experience.*

The Strategic Plan is designed to be a living document; we will set annual outcomes and use metrics to measure our success. Outcomes are not just goals, they are promises to our residents, promises to fulfilling our potential, and promises to our future. As always, please feel free to provide feedback and input as we create the Best Housing Experience!



Wilfred E. Brown
Executive Director

strategic plan 101

a brief history...

In 1998, H&RS embarked on our first ten-year strategic plan. The original plan focused on developing World Class Facilities, The Best Housing Value, Inclusive Learning Environments, Outstanding Customer Service, Valued Staff Members, Customer-Centered High-Tech Services, Pro-Active Energy and Resource Management, and Partnerships Within and Beyond the Department. Five years later, in 2003, H&RS conducted a “midpoint check-in” to assess our progress.



1998 VISION STATEMENTS

- **World-Class Facilities:** We will plan to achieve excellence in all H&RS facilities, manage our fiscal resources, capitalize on our ideal environment, and expand our facilities to accommodate new needs.
- **The Best Housing Value:** We will provide affordable housing, and ensure exceptional and measurable housing value for customers.
- **Inclusive Learning Environments:** We will research and meet the educational and developmental needs of our diverse student population in order to create accessible and welcoming learning environments.
- **Outstanding Customer Service:** We will make H&RS a “one-stop-shop” department within which any staff member can respond to any customer’s needs with exemplary and comprehensive services.
- **Valued Staff Members:** We will foster the development of an organizational culture that values the “whole person,” while providing state-of-the-art training and career development.
- **Customer-Centered High-Tech Services:** We will provide cutting-edge technology to meet customers’ information and service needs.
- **Pro-Active Energy & Resource Management:** We will promote environmental sensitivity among staff and students through reduction, re-use, and recycling programs in all of our facilities and offices.
- **Partnerships:** We will initiate alliances and partnerships within H&RS, as well as with faculty, our colleagues in other campus departments, and in the broader community to enhance the quality of our services to customers.

2003 MIDPOINT CHECK-IN

- In 2003, we revisited our strategic plan to acknowledge our accomplishments and progress, and to re-focus for the next 5 years.
- Two visions were picked to concentrate on: “World-Class Facilities” and “Valued Staff Members” and Action Teams were created around several initiatives related to these visions (community input, community output, staff advisement-financial, and work/life issues).



METHOD: Appreciative Inquiry

- Discover: The identification of organizational processes that work well.
- Dream: The envisioning of processes that would work well in the future.
- Design: Planning and prioritizing processes that would work well.
- Deliver: The implementation (execution) of the proposed design.

In working with our consultant, Lou Ann Daly, we designed our structure around the Appreciative Inquiry method. The idea behind Appreciative Inquiry is to build organizations around what is “working.”¹ Appreciative Inquiry increases trust and organizational alignment by involving and updating people each step of the way.²

1- Theodore Kinni, “The Art of Appreciative Inquiry.” *The Harvard Business School Working Knowledge for Business Leaders Newsletter*, September 22, 2003.

2- “Appreciative Inquiry” <http://www.new-paradigm.co.uk/Appreciative.htm>.

In March 2008, we convened a strategic planning **steering committee** that included people from each unit. This group came up with a list of desired outcomes, screened consultants, and selected Lou Ann Daly as our consultant.

Focus Groups

Prior to the strategic planning conference, we had three open focus groups (including a bilingual focus group). Using the Appreciative Inquiry method (building upon what is working) and our eight 1998 visions, we built upon our strengths by gathering employees’ feedback on what we do best.

Online Site Updates

We created an accessible intranet website for all staff members to get up-to-date information on the strategic planning process and on the focus group feedback. We also used this site to have bilingual surveys to continue to “cast the net” as wide as possible to hear from all of our colleagues. The online site continues to be a tool to update people about the progress of our Strategic Plan and as a resource for teams working on our plan.

1:1 Meetings

We also met one-on-one with a diverse group of employees to get their individual feedback on what we as a department are doing best.



dreaming + designing the conferences

CONFERENCE: part 1

In attendance during our first session were the Senior Management Team, the steering committee, and additional colleagues from each unit. We also invited 4 student leaders, and 4 outside campus stakeholders to a session. During this stage we took the insights and feedback from the focus groups, surveys, and 1:1 meetings and began to craft our 2020 vision and outcomes.

Departmental Check-in (with root beer floats)

This check-in was open to all employees, with specific invitations going out to focus group participants. At this check-in the conference attendees gave an update on the draft of our 2020 Vision and outcomes. We used this time to “test” the direction we were heading in. Essentially it was an opportunity for a large number of our colleagues to “kick the tires.”

CONFERENCE: part 2

During our second session, we had our entire Program Managers team join in. We also had a post-conference outcome planning day, when leaders from all levels of all units benefitted from a training session on how to create annual outcomes and operating plans.

2020 VISION

THE BEST HOUSING EXPERIENCE



We provide opportunities
for residents to get
connected in an amazing
environment through...

VISION 1

World Class Facilities

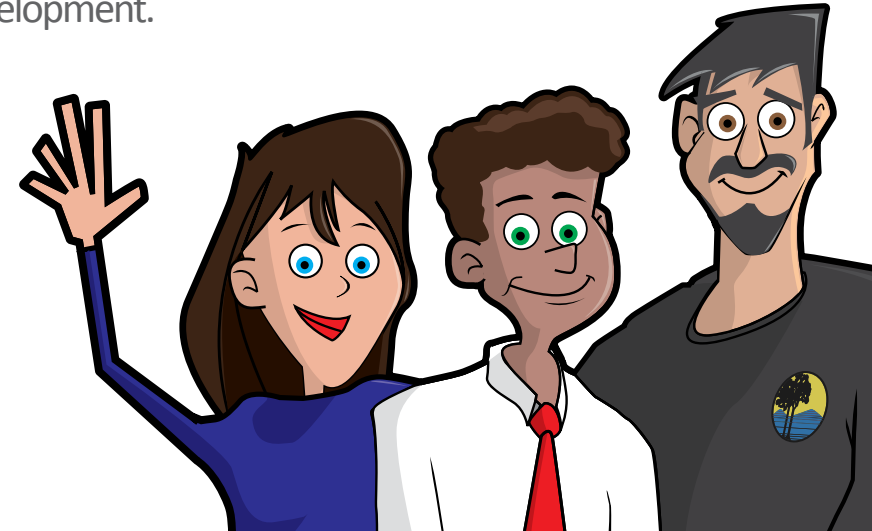
Our facilities continually reflect world-class standards in their responsiveness to residents' needs, use of resources, and sustainable processes.



VISION 2

Talented Staff Who Care

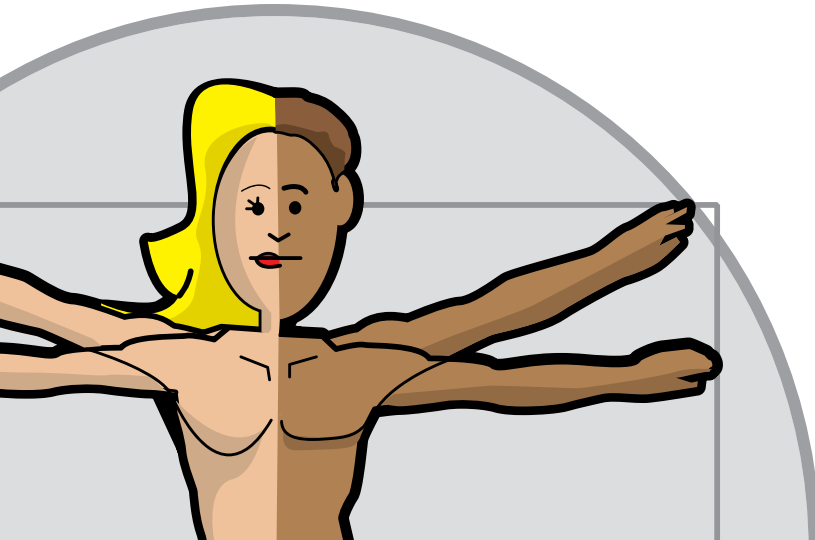
At all levels, we have a talented, caring, diverse staff who have intentional paths and opportunities for growth and development.



VISION 3

Focus on the Whole Person

Our residents have a healthy sense of community and belonging.



VISION 4

Continuous Innovation

We are a member of “best in class” universities where innovations and trends are explored, developed, and evaluated. We actively implement, measure, and modify our innovations, which include initiatives in sustainability, technology, programs, affordability/ accessibility, and quality of service.



Each outcome has an Executive Sponsor. This person is the champion for that overall annual outcome, and they coordinate with each unit. Where applicable, each unit will also have a unit

outcome that relates to the departmental 2009 outcomes, and within the units, there will be an “owner” for these outcomes. These owners will meet quarterly with the Executive Sponsor to ensure that we’re on track department-wide.

Each January as departments start preparing their budgets for the following year, we’ll begin creating the next year’s departmental outcomes and unit outcomes which will be set by the new fiscal year in July.

2009

2015

2020

World Class Facilities

We have established standards for measuring world-class facilities.
(Executive Sponsor = Dan Heedy)

Best Practices for world-class facilities have been applied to our service delivery systems and to new and renovated projects.

Our facilities continually reflect world-class standards in their responsiveness to residents’ needs, use of resources, and sustainable processes.

Talented Staff Who Care

We have identified the programs and processes designed for staff growth and development.
(Executive Sponsor = Charlene Chew-Ogi)

We have pools of diverse staff ready to transition into leadership roles. We have clearly articulated paths for growth and development of caring and competent staff.

At all levels, we have a talented, caring, diverse staff who have intentional paths and opportunities for growth and development.

Focus on the Whole Person

We have a method in place to gather residents’ perceptions about what helps them feel connected.
(Executive Sponsor = Chuck Haines)

Our programs and services foster opportunities for residents to create a healthy sense of community.

Our residents have a healthy sense of community and belonging.

Continuous Innovation

We have identified three to five university housing programs that agree to partner with us to create a council of colleges to define “best in class.” We have identified metrics and defined measurement tools to regularly assess our quality of services.
(Executive Sponsor = Barry Colwell & Jill Hurd)

We are a member of “best in class” universities where innovations and trends are explored, developed, and evaluated. We have systematically implemented, measured, and modified our innovations, which include initiatives in sustainability, technology, programs, and quality of services.

We are a member of “best in class” universities where innovations and trends are explored, developed, and evaluated. We actively implement, measure, and modify our innovations, which include initiatives in sustainability, technology, programs, affordability/accessibility, and quality of service.

strategic priorities

guideposts on the journey

Strategic priorities are the filters through which we make decisions. They are designed to guide us as we fulfill our vision.

- 1 Responsible Use of Resources
- 2 Partnering for Success

An example of these priorities are building sustainable facilities that ultimately keep costs down for our students while taking care of our environment, one of our greatest assets here at UCSB. Another example of utilizing these strategic priorities is our employment of over 1,000 student residents; this is an elegant way to partner with students, giving many of them their first jobs and giving us a great team to work with—everyone wins.

H&RS General Information

- 4,768 Student capacity in eight residence hall communities
- 1,960 Single students living in 616 apartments
- 592 Families living in 592 apartments, totaling 2,100 residents
- 65 Faculty families living in for-sale home project
- 116 Resident Assistants and Resident Coordinators
- 720 Full time equivalent employees
- 3 Million meals served annually in four dining commons
- 2.4 Million gross square feet of residential facilities
- 150 Acres of land maintained
- \$90 Million annual operating and capital budgets
- \$32 Million in capital and major maintenance reserves
- \$726 Million in physical plant facilities
- \$56 Million in planned capital expansion and reinvestment through 2014
- 122,000 Bed-nights from 23,000 conference visitors

Mission Statement

UCSB is a distinguished university recognized for its leadership by state, national, and world academic communities. Housing & Residential Services exists as an integral part of the educational program and academic services of UCSB. Inherent in the operation of Housing & Residential Services is the formation and support of an atmosphere that is conducive to living and learning for our residents and for those who use our services. Housing & Residential Services promotes the academic mission of UCSB and creates through support services and developmental programs a sense of community among students, faculty, and staff.

We are About Values

These are values that H&RS employees strive to exemplify in our daily work. They were developed by staff members to reflect what we are about in our service to the organization, in our relationships with fellow employees, and most importantly, in our work for our customers.

- Exceptional service to those we serve
- Continuous learning & growth
- Respecting and understanding individual differences
- Building partnerships & helping others succeed
- Being environmentally sensitive
- Having fun & being passionate about our work
- Striving to be the best
- Being Safety Conscious

Contributions & Acknowledgements

— Focus Group Participants —

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— Conference Attendees —

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— Consultant —

Lou Ann Daly, O!Lad

— Special Thanks for the following Strategic Planning Conference Participants —

Charlie Arreola, RHA president

Donna Carpenter, Vice Chancellor Administrative Services

Ron Cortez, Assistant Vice Chancellor Administrative Services

Rani Khadalia, SSACC president

Gene Lucas, Executive Vice Chancellor

Rebecca Romo, Resident Coordinator Family Student Housing

Elizabeth Vincent, Resident Assistant

Michael Young, Vice Chancellor Student Affairs

And, thank you to all of the H&RS staff who provided input about the strategic plan.

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Concept: **Willie Brown**, Executive Director

DEFINITIONS

Vision: where we want to go

Strategic Plan: the roadmap we use to get there

Strategic Priorities: filters through which we make decisions to best leverage our resources (time, people, & money)

Outcomes: promises that describe what we will have at the end of a specified period of time (annual and long-term).