



2014-2018

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## Purpose

This Strategic Plan was developed to provide direction for The Students' Association of Mount Royal University (SAMRU) for the next four years and give our stakeholders and community a holistic view of the organization. The different elements included are not intended to be applied to one specific area of SAMRU, but rather will provide high-level focus for the whole organization.

This plan not only establishes outcomes and guides the behaviour and of SAMRU, it also articulates the process of its development. Organizational outcomes are "mapped" by the strategic priorities. These are high-level elements that the organization undertakes to realize its vision statement. How the organization behaves in meeting those outcomes is determined by the essentials, mission statement, vision and beliefs. These are the vital worldview attitudes that the organization adopts to achieve its vision through its strategic priorities. The process of creating the strategic plan is also vitally important for the people of the organization. While planning, the people included in the process will have greater connection and commitment to it, and feel greater ownership of the resulting plan.

## Background

SAMRU engages in a number of strategic research and planning initiatives throughout each year. The staff and the board participate annually in planning activities such as transition, training and planning retreats. The Strategic Plan provides a foundation for ongoing planning and development work for all of SAMRU's operations, representation and governance functions.

This is the third strategic plan that SAMRU has approved. The continuing practice of developing a strategic plan aligns with the desire to evaluate, remain accountable, and re-focus goals in a changing environment.

## Process & Methodology

In February 2014, SAMRU began gathering data to support the development of its Strategic Plan. An external consultant was hired through Propell:us to conduct interviews with eight key MRU stakeholders and to facilitate five internal focus groups. A Student Satisfaction and Awareness survey was conducted and the organization's board and staff were surveyed using specific questions about the existing strategic plan. In all, nearly 1000 people kindly provided their feedback. All research, process and results conform to the organization's Strategic Planning Policy.

Three large-group sessions with participation from the board and staff were completed. The first session was designed to introduce people to the work ahead, develop ground rules, and provide input about what they valued in their interactions with SAMRU. The second session reported the results of the feedback received from the stakeholder research and SWOT (strengths, weaknesses, opportunities, threats) analysis was performed. Finally, volunteers were recruited to a working group that would develop the plan using the data and the SWOTT analysis.

The working group began its work by reviewing the materials from the research and large-group meetings and then carefully worked its way through each element, mindful of the high approval ratings reported from the board and staff about the previous plan wording. Specific feedback on each element was incorporated into new drafts of the mission and vision statement. The values and beliefs remained unaltered. The working group met in person three times. It had a long discussion about the research feedback as it might apply to the essentials and strategic priorities and this was mind-mapped into general categories which were then converted into draft wording.

The essentials were reduced from five to four – Learning Organization concepts were incorporated into Relevance and into the Strategic Priorities – and Relationships was transformed to Interdependency which was seen to better reflect the meaning behind that essential. The Strategic Priorities saw the most change and this was to be expected since it is natural for the work of the organization to evolve over time. A five-person subset of the working group took these concepts and further developed the language around them. After the small working group had completed the wording of all of the elements, the draft was presented to SAMRU staff and the Board through a simple online survey.

The working group presented the draft Strategic Plan to all staff members, and Board members in attendance, during a third large-group session. Finally, the 2014-2018 SAMRU Strategic Plan was approved unanimously by Students' Council on May 5<sup>th</sup> 2014.

## Mission, Vision, Values, Beliefs

*These form the basis of strategic choice and are the starting point for the balance of the strategic plan. With this plan, SAMRU possesses an updated and comprehensive strategic planning framework from which a number of strategic goals and operational action plans will be developed and implemented. SAMRU's established evaluation process will ensure that these goals are executed and evaluated by key SAMRU staff to meet these strategic objectives.*

### SAMRU Mission

*This is the essence of what we are trying to do. It is a broad, high-level statement that articulates our day-to-day work.*

**We represent and serve students to help them succeed.**

### SAMRU Vision

*This describes what we aspire to achieve in the future. It affirms our chosen destination and serves as a guiding image that speaks to our contribution to the community.*

**Where every student can discover themselves, build meaningful relationships and make a difference in the world.**

## SAMRU Values & Beliefs

*These are the things that we hold important in the way we go about our activities. They are our touchstones, our guiding principles. They are the core, enduring beliefs that are our foundation. They endure across time, through difficulties, and remain meaningful.*

## **WE BELIEVE...**

- **Learning** goes beyond the classroom, contributing to the realization of aspirations.
- **Community** is built on individual relationships and shared resources.
- Our **autonomy** makes it possible to respond to the needs of our members.
- Our **integrity** requires accountability, openness, responsible stewardship, and ethical governance.
- **Diversity** makes our community stronger and more vibrant.
- **Fun** is essential to creativity, engagement, and social development.

## Essentials

*These are the foundation of our current and future success. Care and attention is needed to maintain these standards of behaviour so that we can continue to build on past successes.*

### **Legitimacy**

The Students' Association of Mount Royal University has the legal authority and responsibility to act as the incorporated, representative body for all SAMRU members. We demonstrate credibility by striving for transparent and accountable governance, consistent and effective management, principled representation, social and environmental responsibility, and successful operations. ***We maintain our integrity and reputation by holding ourselves to high standards.***

### **Resilience**

The Students' Association of Mount Royal University perseveres through challenges and adapts to change. Our solid foundation is based on dedicated and passionate staff and volunteers, reciprocal loyalty between SAMRU and our workers, the possession and control of our own building, excellent financial health, commitment to organizational learning, and a progressive policy framework. ***Always striving to be better, we stand the test of time.***

### **Relevance**

The Students' Association of Mount Royal University plays an important role in providing a full university student experience because we adapt to the evolving needs of a constantly changing membership. We seek feedback, study best practices, adopt improvements and evaluate our progress in order to deliver valuable service. ***We are an essential part of student life.***

### **Interdependence**

The Students' Association of Mount Royal University can only be fully understood by recognizing its context: shaped by legislation, bound to Mount Royal University, linked with various external organizations and situated in a larger community. We strive to balance these healthy connections with members' need for a

strong and autonomous organization. Our actions can impact others in this system, and thus require a thoughtful and politically astute approach. ***We thrive as an integral part of a complex system.***

## Strategic Priorities

*These are the broad areas where we will focus our work in the next four years to achieve our vision. They guide our organizational, interdepartmental and intradepartmental planning and actions and set the outcomes for goals and objectives.*

### **Constructive Relationships**

Awareness, understanding, and cooperation form the strong foundation of the network of personal and professional connections that span our organization, our membership and the campus community.

- Building strong and meaningful relationships is a primary strategy for effectively increasing awareness and understanding of our organization. Productive relationships help us to increase role and boundary clarity within the organization, within the campus community and to the outside world.
- We explore common purpose between SAMRU and the campus community and identify beneficial goals and opportunities for cooperation to increase our influence and enhance the quality, efficiency and value of our work.
- Through every interaction, we endeavour to build credibility and demonstrate the value of SAMRU's members, the worth of our organization, and the benefit we bring to the community.

## **Vibrant Student Centre**

Our physical space is a source of organizational strength and resilience that allows us to enrich students' lives and the campus community.

- The Wyckham House student centre is an asset of SAMRU because of the contributions of all past and present members. With the guidance of the membership, the student centre evolves and adapts to meet students' changing needs.
- Wyckham House enables the emergence of a vibrant community. We are the stewards of the student centre, cultivating an environment in which students can discover their personal passions and interests, connect socially with their peers and others, develop themselves as individuals and leaders, and find ways to make a difference within the campus and surrounding community.

Wyckham House serves SAMRU members and the community. Through dedicated student services, we provide opportunities for support, empowerment, enrichment, fun and self-actualization. Through enterprising business services, we provide value to SAMRU members and the community by giving them access to products and services they desire, combining quality and customer service at a fair price.

## Responsiveness

We listen to, learn from, and communicate with students and stakeholders to best represent members' needs, invite their inclusion, use resources effectively and demonstrate transparency.

- Student representation is an essential service, ensuring that students' needs and interests are communicated to external stakeholders effectively. This requires awareness of the members' varied opinions, needs and values. We endeavour to represent a balanced common purpose from many voices, while still valuing the lone voice in the crowd.
- Every interaction with SAMRU members is an opportunity for inclusion. We maintain a vibrant, reciprocal environment by creating opportunities for involvement in the organization, providing meaningful services, and maintaining an ongoing dialogue with the members. We recognize that not all students will wish to fully engage with SAMRU, but we challenge ourselves to give each one that opportunity.
- Being responsive means listening more effectively in both structured and unstructured ways, assessing what we hear, and using professional expertise and good judgement to underpin our decisions. We must consistently monitor and evaluate our work in order to make conscientious decisions based on meaningful and reliable information. We strive to articulate these decisions and the reasons behind them so that the process has greater transparency and accountability.
- Our resourcefulness requires us to manage our assets carefully, prioritizing that which is requested of us, and choosing where to devote our resources. We use focus and creativity to deliver high quality services that respond to student needs.



## Situating the Plan

Whether economic, social or political, the external environment is a factor on whether an organization can realize its mission and vision.

As of early 2014, the following are identified external environmental factors affecting SAMRU's ability to operate and deliver services:

- The Alberta Government Budget 2014: After major cuts to post-secondary institutions in 2013, the Alberta Government reinstated 50 million dollars in 2014 to affected institutions. Part of MRU's response to this scenario was to reduce enrollment, resulting in fewer students paying SAMRU's membership fees.
- Increased duration of Membership: More students are participating in four-year programs and this provides increased member retention from year to year.
- Increased Student Participation: The 2014-2015 election had a record number of students running for elected positions, and a record number of student votes (23% of eligible voters) We have seen an increase in student participation in forums such as the AGM, student surveys, and focus groups.
- Changing student demographics and needs.
- SAMRU contractual obligations, opportunities and limitations.
- Supplier and partner relationships.

### **Expansion of Business Services**

SAMRU has experienced a major growth in business services with The Hub, new catering services, and the takeover of a food kiosk, Wycked Deli. Catering services and the Wycked Deli were integrated into the daily operations of SAMRU. These new business services provide further services to the campus community and diversified SAMRU's revenue stream.

### **Human Resources**

In 2013, SAMRU restructured the organization's internal management structure. This restructuring better reflects the unique structure of the organization.

SAMRU now employs 32 full-time employees, and up to 80 part-time and occasional employees. Our comprehensive human resources infrastructure includes progressive personnel policies and procedures, flexible work schedules, bi-annual salary and benefits reviews, a full job classification system, and a commitment to professional development.

### **Finances**

SAMRU has experienced, and continues to experience financial stability. This can be attributed to the nature of SAMRU's planned and proactive approach to investments and annual budgeting. SAMRU employs a comprehensive system of financial policies, solid financial management and fiscal oversight from the board ..

### **Imagine Canada Accreditation**

In 2013, SAMRU began pursuing an accreditation for Imagine Canada. This accreditation will align SAMRU with the best practices within the non-profit industry. It will also lend credence to the legitimacy of the organization.

## Plan Review

### **Review period for the plan**

The review process for SAMRU's 2014-2018 strategic plan is as follows:

### **Annual Review**

Students' Council (the board) will conduct an annual review of the Strategic Plan, ensuring it remains relevant. This will involve prioritizing the work necessary to realize SAMRU's vision.

### **Strategic Alignment**

Work will begin to ensure that there's "strategic alignment" between all of SAMRU's current offerings (e.g. volunteer centres, business operations, student facilities) and the new plan.

### **Plan Implementation**

We also have to operationalize the plan – identify goals that will be implemented each year, create project maps for each goal, and begin implementation in a systematic manner.

### **Annual Objectives**

These objectives will align with the goals developed through the operationalization of the plan. The process will include the person/ group responsible and results will be reviewed mid-year. Each review includes a reassessment of the strategic and practical nature of the objectives and realignment and re-prioritization as needed.

### **Evaluation Criteria**

Evaluation criteria will be established for each area, so that Students' Council can track our progress to realizing our strategic plan.

## Stakeholder Opinion

### **Purpose**

A crucial component of the strategic planning process was stakeholder input. The questions for the focus groups, surveys, and interviews were developed in order to build on the previous strategic plan work. There was general consensus amongst the participants of the strategic planning process that the 2010-2014 Strategic Plan was still applicable to the Students' Association. Stakeholder input was used to further refine and align the strategic plan with the future of SAMRU.

### **Staff and Board SWOT Analysis Based on Stakeholder Input**

The second staff and board strategic planning session included the task of compiling a SWOT (Strengths, Weaknesses, Opportunities, and Threats) analysis of all of the stakeholder input gathered.

### **Nature of Questions for Interviews, Focus Groups and Surveys**

All methods of collecting stakeholder input were intended to solicit opinions on some of the following:

- the previous strategic plan elements
- whether we have achieved the strategic priorities
- whether there was still interest in pursuing the vision and mission
- Awareness and familiarity of SAMRU services and programs.
- Familiarity with the 2010-2014 Strategic Plan
- Alignment of stakeholder input with the elements of the previous strategic plan
- Perceptions regarding the changing role and profile of the Students' Association
- Suggestions for ventures for SAMRU to achieve its vision
- Relationship with Mount Royal University (MRU)
- Communication with stakeholders

### **Senior University Administration Interviews**

Eight interviews were conducted with senior management at Mount Royal University. All of these individuals had been identified by SAMRU management as key stakeholders.

- President
- Provost and Vice-President, Academic
- Vice-President, Administrative Services
- Vice-President, University Advancement
- Vice-President, Student Affairs and Campus Life
- Associate Vice-President, Enrollment Services
- Director, Office of the Secretariat
- Director, Marketing and Communications

The follow questions were asked to each interviewee:

1. On a scale of 1-5, with 5 being *very familiar*, how familiar are you with SAMRU's 2010 – 2014 Strategic Plan?

2. From your perspective, have you seen any changes in SAMRU's profile and roles since 2010? If yes, how would you characterize these changes?
3. How successful is SAMRU in achieving its mission of being "the collective voice of our members"? Please provide examples. Are there any ways in which they could fulfill this role more effectively?
4. What effect, if any, has MRU's achievement of university status had on SAMRU? Are there any new roles or services that SAMRU should be offering?
5. How clear are the distinctive mandates and roles of MRU and SAMRU in serving students? Are there new opportunities for collaboration?
6. How would you describe the nature of SAMRU's relationship with MRU Senior Executives? The Board of Governors? Are there ways in which these relationships could be strengthened?
7. How effectively does SAMRU communicate with MRU Senior Executives and the Board of Governors? Are there any gaps or barriers?
8. MRU will be developing a Strategic Plan shortly. How do you see SAMRU's role in contributing to the success of the Strategic Plan? Are there emerging opportunities where SAMRU could play a leadership role?
9. Any other comments that could support SAMRU in its strategic planning process?

### **Focus Groups**

Focus groups are a crucial component to the strategic planning process. The feedback gathered from the focus groups conducted were used to formulate the restructuring of the strategic plan.

The following questions were presented to each focus group:

1. On a scale of 1-5, with 5 being "very familiar", how familiar are you with SAMRU's programs and services?
2. Are you aware of its 2010 – 2014 Strategic Plan?
  - Any comments/feedback on the Plan?
3. How successful is SAMRU in achieving its mission statements? Please provide examples.
  - Are there any ways in which they could fulfill these roles more effectively?
4. Have you seen any changes in SAMRU's profile and roles in the last few years?
  - If yes, how would you describe these changes?
5. What effect, if any, has MRU's achievement of university status had on SAMRU?
  - Are there any new roles or services that SAMRU should be offering?
6. How effectively does SAMRU communicate with its members?
  - Are there any gaps or barriers?
7. SAMRU identified the following 5 strategic priorities in their 2010-2014 Plan:
  - **Advocacy      Community      Engagement      Enrichment      Innovation**
  - Should these continue to be their priorities in the next few years? What's missing?

### **Advisory Committee Group**

Students' Council receives advice on key issues from its Advisory Committee. The public members of this committee were interviewed as part of the SAMRU strategic planning process.

### **Students-at-large Focus Group**

This focus group consisted of students-at-large. Students participating in this group were not closely affiliated with SAMRU.

**Part-time Employee Focus Group**

This focus group consisted of part-time employees of SAMRU.

**Volunteer Focus Group**

This focus group consisted of volunteers from committees and service centres of SAMRU.

**Clubs Focus Group**

This focus group consisted of executives from student run clubs affiliated with SAMRU.

**Staff and Board Survey**

An online survey through Fluid Surveys was sent to all staff and Students' Council members. There were thirty-one (31) responses from staff, and five (5) responses from Governors from Students' Council.

**Student Satisfaction & Awareness Survey**

The online survey was advertised on the SAMRU website, social media posts, Facebook advertisement, and myMRU, February 4<sup>th</sup> to March 5<sup>th</sup>. 864 students completed the survey. The survey asked about student's awareness, usage and their thoughts on quality of the programs and service of SAMRU.