

Long-Term Strategic Plan Policy

O-1

LONG TITLE	A Policy Regulating the Creation and Implementation of Long-Term Strategic Plan	DATE OF ENACTMENT	9 August 2022
		LAST AMENDED	25 September 2023
REFERENCE No.	O-1	NEXT REVIEW	September 2025
CROSS-REFERENCE.	G-09		
CATEGORY	Operations, Governance	COMPETENT CHAMBER	Bicameral

MANDATE

This Policy shall govern the Plans created by the bodies of this Association for the long-term strategic benefit of this Association. This Policy seeks to formalize a process by which Strategic Plans can be created, adopted, and enacted by this Association, in order to form a more perfect Student Union. This Policy shall be reviewed every two years by Council and the Board.

INTERPRETATION

Short Title

- 1 This Policy may be called the *Long-Term Strategic Plan Policy*.

Definitions

- 2 In this Policy, the following definitions shall apply:
 - “Committee” means the Long-Term Strategic Plan Steering Committee;
 - “period” means the length for which the plan applies;
 - “plan” or similar means the Long-Term Strategic Plan to be created by the Committee from time to time.

GENERAL PRINCIPLES

- 3 In the formation of Strategic Plans, this Association holds the following principles as desirable for the construction and formation of such plans:
 - (a) this Association aims to be a model Student Union, meeting the needs of students of this University by providing exceptional services within a democratic and open governance framework;
 - (b) this Association aims to protect and preserve a good standing in its institutional relationships, public reputation, legal affairs, and financial management;
 - (c) this Association aims for the harmonization and alignment of processes within this Association, its decision-making bodies, stakeholders, and employees;

- (d) this Association aims to consult and involve students-at-large in the processes of the Association;
- (e) the Board and Council are tasked with setting the strategic priorities and goals over a multi-year time frame, and overseeing their implementation;

LONG TERM STRATEGIC PLAN STEERING COMMITTEE

4 There shall be a Standing Committee, acting under the *Committees Policy*, known as the Long-Term Strategic Plan Steering Committee.

Committees Policy (G-04) ss. 26.

5 The members of the Steering Committee shall be:

- (a) the Chair of the Board;
- (b) one Director, elected by the Board;
- (c) two Councillors, elected by Council;
- (d) the President & CEO (Chair);
- (e) the Vice President Finance;
- (f) the Vice President Internal;
- (g) the Executive Director, nonvoting;
- (h) the Director of Communications and Strategy, nonvoting; and
- (i) one additional Senior Director, nonvoting.

THE PLAN

6 The Association shall develop and publish a Strategic Plan for a period spanning not less than four years.

7 The period shall start on the 1st of May in any given year.

8 The Committee shall, in the beginning of the academic year that the last Plan ends, or, in the inaugural year that this Policy is passed, in the same year, draft this Strategic Plan according to the procedure in this Policy.

Development

9 The Committee shall consider and include, in accordance with the General Principles stated in this Policy, the following items in their draft Plan:

- (a) the longstanding fundamental mission statement of the Association as a whole;
- (b) the core vision for the Association during the period;
- (c) a statement of values or guiding principles, which shall include at the least the principles in s. 3, under which the Association seeks to conduct its operations and relationships;
- (d) specific strategic goals to be realized in the pursuit of the vision;
- (e) assignment of such goals to Executive portfolios, Bodies or Departments of this Association; and

(f) an implementation plan, required resources, and success criteria for those goals.

10 The Plan shall further include considerations beyond the period of focus, including recommendations for future long-term plans and projects spanning multiple periods.

11 The Plan shall further include goals, as in section 9 paragraph (d) to be achieved within the period of the Plan, for broader multi-period projects as in section 10.

ss. 9 (d) and 10

Consultation

12 The development of the Plan shall follow the extensive consideration of students-at-large, the Board, Council, the Executives, Service Centres, Businesses and staff, whether in written testimony or oral questioning.

13 The Committee shall, in order to further its consultative efforts, host public meetings and roundtable discussions with stakeholder groups, and issue general surveys.

Passage

14 The Board and Council shall, by joint resolution, adopt the Plan in the first half of the first year of the Plan's period.

REPORTING

15 Not less than twice per year, the Executive Council shall meet to discuss and review the Plan and assess it against their yearly priorities.

Executive Policy (G-02) s. 14

16 Every year, at a meeting of Council and of the Board in the Fall term, the Executives shall give a report on the status and progress of the Plan.

17 This report shall include, at the least:

- (a) the progress in the specific strategic goals;
- (b) any recommended additions, deletions, and corrections to the goals, following a reasonable review of continuing relevance and appropriateness;
- (c) the progress in the broader vision of the period; and
- (d) a review of the adherence to the guiding principles of the Association in the past year; and
- (e) if in the last year of the period, recommendations for the next Strategic Plan following from the vision and goals of the one ending.

s. X

ADMINISTRATION

Publication

18 The Plan, the draft from the Committee, and every annual progress report shall be made publicly available, in a prominent place, digitally and in print.

Distribution

19 Every newly elected official and newly hired staff member shall be distributed a copy of the Plan at the beginning of their term.

Schedules and Regulations

20 The Board shall be empowered to make Regulations under this Policy, published as Schedules to the same, to the extent that they do not contradict with the provisions of this or any other Policy.

OVERRIDE AND AMENDMENT

21 Council may, by resolution of 2/3 of its members, direct the Board to amend or rescind the Strategic Plan.

22 A Strategic Plan that was rescinded by Council shall be replaced in the same year by a new Strategic Plan.



Schedule I – Sample Table Of Contents

O-01-I

COMPETENT CHAMBER Board	AUTHORIZED	9 August 2022
	LAST AMENDED	9 August 2022

1 A Strategic Plan shall have a Table of Contents that resembles the following:

- Introduction** 1
- Executive Summary** 2
- Mission Statement** 3
- Vision for 2023-2027: *Renewing CUSA*** 4
- Strategic Goals** 5
 - Equity and Positive Representation 6
 - Independence and Strong Advocacy 8
 - Transparency in Policy and Finance 10
 - Engaging Students 11
 - Revitalizing Businesses and Service Centres 14

Schedule II – References

O-01-I

COMPETENT CHAMBER Board	AUTHORIZED	9 August 2022
	LAST AMENDED	9 August 2022

1 A Strategic Plan shall have References that resembles the following:

REFERENCES:

[Brock University Students' Union - Strategic Plan, 2021-2025](#)

[Dalhousie Student Union - Strategic Planning Policy, 2019](#)

[Ryerson Students' Union - 5 Year Strategic Plan, 2020-2025](#)

[University of Alberta Students' Union - Strategic Plan, 2019-2023](#)

[University of Alberta Students' Union - Bylaw 4000, Students' Union Strategic Plan](#)

[University of New Brunswick Strategic Plan](#)

[University of Toronto Students' Union - Operations & Finance Policies, POLICY 101 - Policy on Strategic Planning](#)

[Western University Students' Council Strategic Plan](#)

[Wilfrid Laurier University Students' Union - Strategic Plan, 2020-2025](#)

[StFX Strategic Plan](#)

Brock University Students' Union

OUR VISION

To cultivate a generation of students that intently shape our world.

The ultimate work of BUSU is the realization of our vision. All our efforts, objectives, and resources aim to foster generations of students with the mindset, skillset, and tools to be transformative global citizens. During their time at Brock and much after, students continue to intently create a positive impact on the world that echoes into future generations.

OUR MISSION

To foster an ever-improving Student Experience that is transformational, enriching, and empowering.

Our singular focus at BUSU is to create the best student experience ever. However, the word best leaves us undefined, so we will instead improve the student experience every day to achieve being the best. The student experience encompasses the personal, social, and educational journey we all go through at Brock.

Our BUSU Student Experience will transform students to be active change-makers in our community. It will enrich their lives through engaging events and programming while providing the necessary resources for empowered advocacy, public involvement, and active participation in internal governance. Lastly, the BUSU Student experience will empower students to pursue personal and professional growth to create life on their terms.

OUR OBJECTIVES

We achieve our mission by:

- Deeply understanding the evolving needs of students
- Enhancing the educational, social, and personal lives of students
- Advocating on behalf of and with students, internally and externally
- Providing resources, services, and support to enrich the student journey
- Fostering welcoming and inclusive student communities

Dalhousie Student Union:

On consultation and data collection:

3.2.4 Data to be considered must include, but is not limited to:

3.2.4.1 Annual DSU Survey Results;

3.2.4.1.1 Annual DSU Survey results will be available no later than December 10th.

3.2.4.2 Post-secondary educational trends;

3.2.4.3 Socio-economic and demographic characteristics;

3.2.4.4 Any relevant new regulations and legislative changes;

3.2.4.5 Consultative forums and focus groups;

3.2.4.6 Current and projected DSU budgets.

UTSU

AREA OFP Operations & Finance Policies

POLICY 010 Policy on Strategic Planning

OWNERS Governance Committee of the Board of Directors

AFFECTS (ALL)

OFP-010 | Policy on Strategic Planning

Preamble & Scope

1. The purpose of this policy shall be to outline the principles and process for the

establishment and maintenance of strategic plans at the UTSU.

2. In order to successfully fulfill the mandate of the UTSU in a forward-thinking manner, a clear and shared vision is necessary for the organization. Strategic planning, stakeholder assessments, and environmental scans are a necessary part of accomplishing this goal.

Development and Review

3. The UTSU shall develop and publish a strategic plan in accordance with the following:

- a. Development shall adopt a consultative process, taking into extensive consideration the voices of the UTSU membership, board, and staff
- b. Once a draft is produced, members of the Board shall have the opportunity to review, discuss, and finalize the strategic plan before the plan is sent for final approval.

4. The UTSU shall review its strategic priorities in accordance with the following:

- a. The Executive Committee shall commence an annual review of the strategic plan, in conjunction with the staff of the UTSU, during the fall semester.
- b. Members of the Board of Directors shall be invited to working groups each winter semester, allowing for feedback and participation in the review.
- c. A report on the review shall be presented to the Board of Directors during the winter semester by the Executive Committee.
 - i. Reports presented to the Board should consider the following:
 1. Progress in specific target objectives;
 2. The UTSU's progress towards achieving its broader goals, long-term objectives, and values;
 3. Whether existing projects and activities are within the parameters of the strategic plan's vision, strategy, and objectives
 4. Whether certain goals originally outlined in the strategic plan are no longer viable or relevant to the UTSU's values; or
 5. Whether certain goals should be added, changed, or removed from the mandate of the strategic plan.
 - ii. Upon receipt by the Board of Directors at a meeting, the report shall be published on the UTSU website for posterity.

Western USC

[From Ryerson Students Union:](#)

The Ryerson Students Union 2019/2020 Board of Directors implemented the 5 Year Strategic Plan on April 21st, 2020.

RSU Executives are expected to carry out the recommendations outlined in this document each year. The strategic plan will help with creating better governance structures for the long term stability of our organization. Which helps the RSU better service the needs of our members.

The document is set to be renewed by the 2025/2026 Board of Directors.

Executive Committee Meeting

Executives should have two (2) mandatory meetings throughout their term that reviews the 5 Year Strategic Plan. The objective of these meetings will be to select areas of the strategic plan that they can realistically work on throughout their term.

First Meeting

Within the first two (2) months of the Executives term they should sit down with the Executive Director and Financial Controller to strategize for the rest of the year. In this meeting, the Executives should have a clear idea of what they would like to accomplish with regards to events, campaigns, and initiatives.

Once they have their year laid out, they should consult the 5 Year Strategic Plan to create a strategy for the year that will benefit the organization and will move the RSU towards accomplishing the recommendations laid out in the strategic plan. This should be a united effort by all the executives to complete these objectives.

Second Meeting

At the end of the Executives term, during their last month in April, the executives should get together to discuss what recommendations they worked towards this year and what they were able to accomplish. This meeting should be minuted and documentation should be provided to the next Executive Committee so they are aware of what has been completed and what still needs to be accomplished.

At this meeting, the Executives should also propose new recommendations or ways to improve the RSU based on their experience and observation over their term.

The Executive Director will be responsible to organize and provide the documentation to each incoming Executive team to help them strategize and accomplish the recommendations set out in this document.

In 2025, the acting Executive Director and President should work towards putting together a new 5 strategic plan committee, in which Executives, Staff Members, and Board of Directors work together to create a new or updated 5 Year Strategic Plan.

The plan should outline the mission of the RSU, the success, and recommendations to address the areas of improvement. It should be passed by the acting Board of Directors at the end of the year, and if possible, at the Annual General Meeting to get student input. Additionally, surveys should be conducted with the RSU membership to get students advice on where the RSU should be headed for the future.

From University of Alberta Students Union:

The Strategic Plan provides a broad framework that guides the Students' Union in its decision making and goal setting. The Mission, Vision, and Values are the foundation of our culture and we use them in determining our actions. The Critical Success Factors and their associated goals are used to frame particular priorities for the life of the plan; these are the areas we must work intentionally to address. In this way, the plan provides long-term consistency to our actions, while permitting ongoing, annual revisions to how we execute the imperatives of the plan. In conclusion, this plan and its predecessors are the documents that ensure our operations continue to best serve the students at the University of Alberta. This plan is a commitment to the long-term sustainability of our organization, advancing the student movement, and developing the Students' Union in ways that are important to students.

In March 2011 Students' Council passed [Bylaw 4000](#), which requires the SU to “develop, maintain, and use” a Strategic Plan. The bylaw also requires the SU to renew the plan every four years, a reflection not only of the importance of the planning process, but also of how much the SU has grown, the increased sophistication of its programs, and the changing environment - particularly in the area of technology - in which it operates.

Policy:

1. Purpose

1. The purpose of this Bylaw is to:
 1. Provide a framework under which the Students Union may pursue its long and short-term objectives in a practical and efficacious manner;
 2. Establish the Students' Union as a professional organization through sound business and management planning practices;

3. Provide the pre-requisite framework for a good governance as steward of student resources; and
4. Provide a framework for objective evaluation of and for its membership, its political officers, services and service providers, and business operation.

2. Definitions

1. For the purpose of this Bylaw:
 1. “Strategic Plan” shall mean the master plan for the Students’ Union addressing the overall organizational objectives of the Students’ Union as a whole during the life of the plan.
 2. “Executive Plans” shall mean the plans outlining the specific objectives and supporting action plans to be achieved by each voting member of the Executive Committee over the term of the current Executive Committee.
 3. “Operating Plans” shall mean the plans outlining the specific objectives and supporting action plans to be achieved by each Students’ Union department.

3. Obligations

1. Through this Bylaw the Students Union is obligated to:
 1. Develop, maintain, and use a Strategic Plan.
 1. The Executive Committee shall act as the steward of the Strategic Plan on behalf of Students’ Council and the membership.
 2. Develop, maintain, and use Executive Plans and Operating Plans which support, as appropriate to functional area, the Strategic Plan and its components.

4. Components of the Strategic Plan

1. The Strategic Plan shall comprise of:
 1. A Mission Statement of the Students’ Union as a whole,
 2. A Vision for the Students’ Union as a whole,
 3. A statement of Values under which the Students’ Union conducts its operations and relationships,
 4. Critical Success Factors which support the achievement of the Vision, and
 5. Strategic Goals that are to be realized in order to achieve the Vision.

5. Life of the Strategic Plan

1. The Strategic Plan shall have a life no less than four years.

6. Components of the Executive Plans

1. Each Executive Plan shall comprise of:
 1. A mission statement addressing the role under the Strategic Plan,
 2. Executive objectives which account for the achievement of the Mission with respect to the Critical Success Factors and Strategic Goals of the Strategic Plan,
 3. Action plans to achieve the executive objectives that respect the statement of Values,
 4. A projection of the required resources to achieve the action plans, and
 5. Measurement criteria to evaluate the success of the plan.

7. Components of the Operating Plans

1. Each Operating Plan shall comprise of:
 1. A mission statement addressing the department's role under the Strategic Plan,
 2. Operating objectives which account for the achievement of the Mission with respect to the Critical Success Factors and Strategic Goals of the Strategic Plan,
 3. Supporting Action Plans to achieve the Strategic Objectives that respect the statement of Values,
 4. A projection of the required resources to achieve the action plans, and
 5. Measurement criteria to evaluate the success of the plan.

8. Review of Executive and Operating Plans

1. The Executive Committee shall provide Executive Plans to Students' Council, accompanied by a presentation, prior to July 31st of the given year.
2. The Executive Committee shall provide to Students' Council a review of the Executive Plans, accompanied by a presentation, prior to January 15th of the given year.
3. The Executive Committee shall present a review of the year to Students' Council, prior to the conclusion of that Students' Council's elected term.
4. Operating Plans shall be reviewed annually by the Executive Committee and the Finance Committee.

9. Ratification and Alterations

1. A two-thirds majority vote of Students' Council shall be required in order to:

1. Ratify a Strategic Plan, and
2. Amend the Strategic Plan in effect.

10. Strategic Plan Steering Committee

1. The mandate of the strategic plan steering committee shall be to review the Strategic Plan by:
 1. examining the relevancy and appropriateness of the mission, vision, statement of values, critical success factors, and strategic goals; and
 2. inducing a process to redevelop and renew the Strategic Plan as appropriate.
2. The strategic plan steering committee shall be struck:
 1. After four (4) years have elapsed from the previous review, or
 2. Upon a two-thirds majority vote of Students' Council to do so.
3. The President shall chair the Strategic Plan Steering Committee.

11. Renewal of the Strategic Plan

1. The Strategic Plan Steering Committee shall be struck to review the Strategic Plan:
 1. After four (4) years have elapsed from the previous review, or
 2. Upon a two-thirds majority vote of Students' Council to do so.
2. A review of the Strategic Plan shall:
 1. Examine the relevancy and appropriateness of the Mission, Vision, statement of Values, Critical Success Factors and Strategic Goals; and
 2. Induce a process to redevelop and renew the Strategic Plan as appropriate

Laurier

The Ends of the Students' Union

The Students' Union uses the Policy Governance system to define its strategic priorities and establish standards for transparency and accountability. The ultimate purpose of the Students' Union is defined in the Ends policy, a central component of the Policy Governance Model.

The Ends of the Students Union: The Organization exists to represent, advocate for, and support the primary stakeholders, the students of Wilfrid Laurier University, and to provide them with a holistic university experience and an enhanced student life. The costs of these benefits will be justified by the results. In no specific order of priority, students will benefit from: An affordable, accessible, and high quality academic experience. A safe, sustainable, and empowering environment. Diverse and inclusive social interaction. Products and services

that cater to the financial needs of students. The Mission, Vision, Guiding Principles, and goals of this strategic plan are intended to further specify and articulate the priorities established in the Ends

The Organization exists to represent, advocate for, and support the primary stakeholders, the students of Wilfrid Laurier University, and to provide them with a holistic university experience and an enhanced student life. The costs of these benefits will be justified by the results. In no specific order of priority, students will benefit from: 1. An affordable, accessible, and high quality academic experience. 2. A safe, sustainable, and empowering environment. 3. Diverse and inclusive social interaction. 4. Products and services that cater to the financial needs of students.