

Institutional Planning Policy of Saint Joseph University of Beirut (USJ - Saint Joseph University of Beirut)

1. PURPOSE

The University periodically engages its stakeholders in reflection and planning processes based on the results of evaluations. Through these processes, it assesses its strategic position, articulates its priorities, examines the alignment of its objectives, essential functions, and resources, and defines its future directions. This leads to the development of a five- or seven-year strategic plan that identifies strategic axes and establishes the strategic objectives the University aims to achieve to realize its vision in alignment with its mission and values. Annual organizational planning enables the execution of this strategic plan.

2. SCOPE

This policy applies to all entities and institutions of the University.

3. RESPONSIBILITIES

Pilot:	Strategic Steering Committee (SSC)
Actors:	Board of Trustees (BT) University Board (UB) Executive Board (EB) Strategic Steering Committee (SSC) Ad hoc Strategic Plan Development Commissions (SPDC) Permanent Commissions (PC) Planning and Budgeting Commission (PBC) Quality Assurance Unit (QAU) Secretary-General (SG)

- a. Board of Trustees (BT)
 - Validates the Strategic Plan
 - Validates the Annual Operational Plan
- b. University Board (UB)
 - Validates the Strategic Plan
 - Validates the Annual Operational Plan
- c. Executive Board (EB)
 - Deliberates on the proposed Strategic Plan
 - Deliberates on the Annual Operational Plan
- d. Strategic Steering Committee (SSC)
 - Oversees the strategic planning process
 - Decides on the target duration
 - Ensures a review of the Vision, Mission, and Values of the University
 - Identifies priority areas and Strategic Goals
 - Forms the SPDC
- e. Ad hoc Strategic Plan Development Commissions (SPDC)
 - Propose strategic objectives, related initiatives, set performance indicators, and performance targets
 - Monitor the implementation of the strategic plan

f. Planning and Budgeting Commission (PBC)

- Prepares the annual operational plan

g. Permanent Commissions (PC)

- Conduct a SWOT analysis

h. Quality Assurance Unit (QAU)

- Provides necessary support for conducting a SWOT analysis
- Participates in drafting the Strategic Plan
- Prepares the strategic plan follow-up report

i. Secretary-General (SG)

- Participates in drafting the Strategic Plan
- Communicates the Strategic Plan to all internal and external stakeholders

4. Development of the Strategic Plan

- The process is initiated by the Rector one year before the deadline of the current Strategic Plan. It can also be initiated by a request from the Executive Board (EB), the University Board (UB), or the Board of Trustees (BT).
- The Strategic Steering Committee (SSC) oversees the strategic planning process.
- The process begins with a situational analysis (SWOT analysis) conducted by the permanent commissions and the Research Board to identify the strengths, weaknesses, opportunities, and risks the University might face. This analysis considers the views of the internal and external stakeholders of the University: Strategic Board, deans, directors, faculty, staff, students, Alumni, employers, etc.
- Following this analysis, the SSC reviews the Vision, Mission, and Values with the involvement of university stakeholders. The Committee decides on the target duration (5 to 7 years), identifies priority areas and their strategic goals, and forms the Strategic Plan Development Commissions (SPDC), one for each area. These include members from the University's internal and external stakeholders.
- The SPDC propose strategic objectives and related initiatives. They prepare an Action Plan and set performance indicators as well as performance targets to be achieved. A Strategic Planning Guide is made available to university stakeholders.
- The QAU, in collaboration with the Secretary-General, participates in drafting the final version of the Strategic Plan.
- The Executive Board reviews the proposed Strategic Plan.
- The University Board discusses and validates the Strategic Plan submitted by the Executive Board.
- The Board of Trustees provides feedback on strategic issues and validates the proposed Strategic Plan.
- The Secretary-General, in collaboration with the Publications and Communication Office (SPCOM), communicates the Strategic Plan to all internal and external stakeholders through various channels (website, email, meetings, etc.).
- At the institutional level (faculties and institutes), each Board develops a specific Action Plan aligned with the University's strategic objectives, considering the input of its Strategic Orientation Board, which includes stakeholders from the labor market.
- Offices and entities reporting to the Rector or Vice-Rectors develop their action plans with the approval of the Rector or the relevant Vice-Rector.

5. MONITORING THE IMPLEMENTATION OF THE STRATEGIC PLAN

To monitor the implementation of the Strategic Plan, each academic or non-academic entity prepares an annual report in July to show its contribution to achieving the University's strategic objectives and provide an update on the short-term Action Plan aligned with these objectives. This report includes a self-assessment of the entity.

The QAU supports this operation by preparing a strategic plan follow-up report between November and January. This report and the annual reports of the academic and non-academic entities are made available to the Rector and the SPDC. The SPDC update the Action Plan and review the Strategic Plan objectives if necessary.

6. ANNUAL OPERATIONAL PLANNING

Strategic planning is supported by an annual operational planning carried out by the Planning and Budgeting Commission (PBC), composed of the Rector, the heads of the SPDC, the Secretary-General, the Chief Financial Officer (CFO), and the QAU coordinator.

To develop the University Annual Operational Plan, each entity prepares its Annual Operational Plan, including its human and financial resource needs based on its Action Plan, while considering the University's strategic priorities and the Action Plan prepared by the SPDC. The PBC reviews this plan and the budget of each entity as well as the overall University budget prepared by the Financial Office and the Vice-Rector for Administration. The entity's Annual Operational Plan will be part of the annual report it prepares in July.

The University's Annual Operational Plan and any modifications to the Strategic Plan objectives, once approved by the University Board, are presented to the Board of Trustees for revision and approval.

7. POLICY UPDATE

This policy is evaluated and revised as needed, at least every five years from its adoption date by the Board of Trustees.