

Training Session #1

Hello everyone, welcome to the first strategic planning training session. This training session is to help you understand the planning process and to walk you through the unit plan template, and guide you to complete the template. First, let us find the plan template and supportive documents. Go to the website of **the Office of Institutional Effectiveness (oie.pittstate.edu)**, under the tab of **Strategic Planning**, you will see **planning resources**. Click it, you will see five documents: Levels of Planning, Strategic Planning Timeline, Unit Plan Template, and two sample plans. Click and download the **Levels of Planning** and **Strategic Planning Timeline**. These two documents are to clarify the hierarchy of our planning structure and navigate the timeline for your unit.

Before we open the supportive documents, let's take a look at our new strategic planning process. In the previous planning process, all units submitted their plans at the same time. It did not allow enough time to ensure alignment, communicate initiative, and allocate budget to support initiatives. Now these needs are built into the planning process. The university offices are divided into three levels: Level I are the university major divisions, led by the President and Vice Presidents. Level I units include Office of the President, Academic Affairs, Administration & Finance, Student Life and University Advancement. The offices that report to Level one leaders are level II offices, such as Office of Information Services, academic colleges, Budget & Human Resource etc.. Thus, the units that report to Level II leaders are Level III units. Some level two have level three offices and some don't.

President Scott has communicated to the campus of the university-level strategic planning priorities. All units across campus should have action plans to support university priorities. The priorities within each division will be communicated from the level one leader to level two then to

level three leaders. In this way, the unit actions will be aligned to both university- and division-level priorities. At the same time, the new initiatives proposed by unit leaders will move upward from level III to level I. Units at each level have separate timeline to submit plans to their upper-level leaders so that the upper-level leaders have adequate time to communicate and provide feedback to the unit leaders. All unit plans and initiatives will be reviewed by the **Strategic Planning Council**, which will also make recommendations to President regarding funding requests and strategic priorities for the following year. .

As we understand the new strategic planning process, let's take a look at the supportive documents of the **Levels of Planning** and the **Strategic Planning Timeline**. Use these two documents to find the level and the timeline of your unit. If you are a leader of a level three unit, your plan is due to your level II supervisor on November 1st, 2016. Next, click to download the unit plan template.

First, enter the name of your **Upper-level Unit**. If you are a leader of a level III unit, this is where you enter the name of the level II unit. Next, enter the name of your unit into the **Unit Name**. If your unit has had the mission and vision and you plan to continue to follow them, enter them under the question of **what is the mission or vision of your unit**. If you need further assistance on how to update the mission and vision of your unit, please watch out for another training session. For the question of **how does your unit contribute to the mission and vision of the university strategic plan**, this is where you describe the alignment of your unit with the university's strategic plan. You can find the University Strategic Priorities at the Internal PSU Document at GUS.

Then we come to the matrix of **Strategic Plan and Alignment**. First, let's replace the word 'UNIT' with your unit name at the title of the matrix. Then, enter the first goal of your unit to Cell 1. *Don't document everything your unit does*. Your unit goals should be the major initiatives that your unit

plans to implement or the accomplishments that your unit plans to achieve. By the end of the plan, the achieved goals should lead to the materialized vision. In other words, if your units achieve all the goals, your units will successfully turn the vision into the reality. You can identify as many or as few goals as you want. But we recommend that you choose 3-5 goals to make the plan realistic and achievable.

The second cell is to indicate whether the goal is a new goal or a continuing goal. Because we are in the first year of the planning cycle, all goals are new. So leave the cell as “**this is a new goal**”. When it comes to the time to update the progress, you can click the cell and choose “**this is a continuing goal**” from the pull-down menu. In Cell 2, activity 1.1, enter the first activity that your unit is going to take to achieve the goal one. Like the goals, you can set as many or as few activities as you prefer. But please be aware that you will identify measurable outcomes for each activity, and update the progress of each activity periodically. So, we recommend that you keep the number of activities to be manageable, like 3-5 activities.

Cell 3 and 4 are for you to identify the alignment of your unit with the university’s strategic priorities and your upper-level priorities. You can find the University Strategic Priorities at the Internal PSU Document at GUS. When identify the alignment, refer to the action statement number in cell 3, such as action plan 1.2.3.. Don’t copy the text of the action plan into the cell, just the number. Then, describe the upper-level priority in cell 4. Your direct supervisor should have communicated the divison priorities with you. In cell 4, briefly describe the upper-level priority that the activity aligns to. Please limit the alignment description within 30 words. Also note that not all activities need to align with the university’s priorities or upper level priorities, but you should identify at least one activity that aligns with the university priority and one with the upper-level priority. They can be the same one.

In cell 5, enter the time frame that you intend to complete this activity. You don't have to limit the time-frame to be one year. In cell 6, enter the target of your activity and how you plan to measure it *within a year*. The target should be specific and measurable, such as 1.5% increase, 300 e-mails, or build 100 additional parking spaces. Cell 7 is for you to update the progress of your activity. In the first year, you will describe the period that you plan to update the progress, such as per year, per semester, or even per month. When it comes to the updating, you will describe the progress in the update period. For example, if the target of an activity is to build 100 additional parking spaces within a year, you can describe the update period as "quarterly". Then, the progress in the 1st update period could be "25 spaces, 1st quarter". You don't need to have one update period for all your activities. The update period depends on the feature of the activity and the agreement between you and your direct supervisor.

There are 4 cells under the block of budget and resources. This is for you to propose the financial support that you need to implement the activity. In cell 8, enter the existing budget that you plan to use. If the existing budget is not enough, enter the budget or resource that you propose to acquire in the cell 9. In cell 10, describe how you plan to *acquire the extra resources* or *reallocate the existing budget*. For example, you may want to eliminate a program that does not work well and move its budget to support the new one. In cell 11, describe the fiscal year that you intend to acquire the new budget or reallocate the existing budget. Identify the frequency of the acquired resource. For example, describe if this is a one-time investment or this will be a recurring request that needs to add to the annual budget of the unit.

After you submit the unit plan to your supervisor, the supervisor can provide comments about the activity in cell 12, and cell 13 would be your response to the supervisor's comments. The second page of the unit plan template is the how-to in text form. You can also find two sample unit plans,

one for an instructional unit and the other for a non-instructional unit, at the **Planning Resources** page at the **Office of Institutional Effectiveness** website. Hope this training session provides you enough information on how to complete the unit plan template.

Don't be worried if you have questions about the planning process or are still confused by the template. We've made significant changes to the planning process. This very first year, academic year 2016-2017, will be our beta year. You can make mistakes without consequences. Together we will learn how to plan, how to integrate, and how to be accountable. Also, don't hesitate to send your questions, comments, or concerns to me at dli@pittstate.edu, or just give me a call at x4119. I would be more than happy to provide you as much assistance as I can. Remember, you will *not* be the only who ask questions. Your questions and feedback will make the whole planning process better!

If you need further assistance on how to generate the mission and vision of your unit, and how to set the target and measure the activities, watch out for a separate training session.

Thank you!