In Lesson 1, we will think about strategic planning for your unit. We will look at the purpose of strategic planning and the three key questions behind strategic planning. You will also learn about Insight 2.0, UVU's strategic planning management system.

**STRATEGIC PLANNING**

Strategic planning is a process of selecting goals and then choosing medium-term actions that move an organization to achieve those goals. It keeps organizations focused on what they should be accomplishing rather than drifting into other work.

**The Purpose of Strategic Planning at UVU**

UVU's unit strategic planning process serves three main purposes:

- Planning communicates vision, sets priorities, and focuses efforts on fulfilling the unit and university missions.
- Planning provides high-level, medium-term guidance for unit operations and resource allocation.
- Planning is essential for compliance and accreditation, and is designed to comply with Northwest Commission on Colleges and Universities standards.

Strategic plans are required for colleges/schools and all units led by executives. Other units or major university-wide initiatives may be required to provide a strategic plan at the discretion of their respective vice president.

**Three Planning Questions**

At UVU, strategic planning means thinking through three key questions about what your organization does:

- **What should we be doing?**
- **How well are we doing it?**
- **How can we do it better?**

There are many models of strategic planning. No one model or terminology is right for all contexts. UVU's terminology works to keep everyone on the same page in this process. That is more important than the meaning of specific terms.
"As long as everyone involved in the planning process agrees to a definitional hierarchy, any combination of words can be used."

MANAGING PLANNING: INSIGHT 2.0

Units manage their strategic plans in Insight 2.0, which is powered by Xitracs planning support software. Insight 2.0 allows editing, storing, publishing, and annually revising plans in a common framework.

To begin working on your strategic plan in Insight 2.0, click on "Plans," then "Unit Strategic Planning," then your unit.

Fields and Responses in Insight 2.0
Each element of a strategic plan is called a field in Insight 2.0. Information is entered as a response to each field.

To view a field and response, click on it. Instructions for each response are included in the field.

Conclusion
Using the three key questions of strategic planning, supported by the Insight 2.0 system, your organization will be better able to keep its focus on its mission over time.

The next lesson will help you set up users in Insight 2.0 so that the right group of people have access to your strategic plan.