Unit Strategic Planning With Insight 2.0: Lesson 5: Strategies

In Lesson 5, you will learn to select strategies based on your assessment results that help you meet your objectives. Choosing strategies that move you toward what you should be doing in light of how you are doing is how an organization does things better, and will make your organization successful.

STRATEGIES

Strategies are multi-year projects or initiatives that will lead the unit to achieve an objective in the existing or anticipated operating environment. They are expected to be completed within no more than a four-year time frame but should be reviewed annually.

Choose your strategies based on the needs identified in the assessment phase of planning so that you will meet your objectives. Strategies that don't consider where you are now are unlikely to be effective. You should be able to explain how a strategy will meet objectives and what changes you expect to see in assessment results because of the strategy.

Strategies are more than an action plan. Strategies are major directions in which your organization will move over the next four years. They will usually include several actions or initiatives to be implemented over the timeframe of the strategy. Unit leaders should maintain more detailed action steps or work plans outside of the strategic plan.

Strategies: An Example

In its assessment, Institutional Effectiveness and Planning found that UVU’s culture of innovation, improvement, and sustainability is weakened by current planning practices. IEP was in danger of not fulfilling one of its objectives. IEP identified three strategies to remedy the problems:

- Transform PBA to be more strategic in nature by tying assessment rationale to strategies and resource priorities.
- Develop a strategic planning training process to help units develop more coherent plans and use them more effectively.
- Structure new planning support software to make the unit planning process clearer and easier to comply with.

The details of this are part of IEP’s annual work plan. This training, for example, is part of strategy 2, but we also built face-to-face training sessions. The two steps are part of the same strategy.
Strategy two is a multi-year strategy. It was originally planned for years two and three of IEP’s 2015-16 strategic plan. The two steps above were implemented only after a revised planning process and new software was put in place. In year three (2017-18), IEP will develop training specifically on the assessment phase of planning.

EDITING STRATEGIES IN INSIGHT 2.0

“Strategy Name” and “Strategy” parallel the similar objectives fields: they provide a reference name and a description of the strategy. The rationale should explain why this strategy is expected to lead to fulfilling the objective given assessment findings.

Strategies are time-limited but may not begin immediately. The “Begin Year” and “End Year” fields refer to the four-year planning timeline. Select the appropriate years and the current status of the project from the drop-down menus for each field.