



DATE: January 10, 2020

FROM: Nicholas P. Jones, Executive Vice President and Provost

TO: President's Council, Academic Leadership Council, and Unit Executives

SUBJECT: Unit planning process and timeline

In late March 2019, I wrote a memo to each of you titled: "Extension of University strategic plan through 2025." I summarized the decision by the Board of Trustees to support the extension of the University strategic plan to 2025 and how this would affect the timing of the Unit level strategic plans.

Since March, we have been rigorously assessing plan implementation via the Unit level strategic plans, strategic plan seed grant progress, strategic plan executive committee reports, and signature initiative data to date. To that end, we have produced a pair of documents summarizing the assessment of the institutional plan, namely:

- 1) The institutional strategic plan assessment. This document examines the results of our institutional plan (2016-2020) to date and attempts to summarize opportunities for development in the institutional plan moving forward, and
- 2) The revised institutional strategic plan. This document uses the assessment to provide a data-informed set of changes guiding the extension of the strategic plan for the institution moving forward to 2025.

We provide these documents as guidance for the development or updating of your Unit level plans, which are due in draft form using the template below by July 31st, 2020. The Office of Planning, Assessment, and Institutional Research (OPAIR) will use these templates to enter these drafts into the Nuventive system (pilot Units will be helping OPAIR refine this software from January to July). Draft plans will then be reviewed by several groups related to the strategic plan (including those leading the plan foundations, thematic priorities, and supporting elements), with the aim of providing your Unit useful feedback. Integration of feedback and a final strategic plan for your Unit will be due on December 21st, 2020. Units will then start their implementation in January 2021.

Additionally, several resources are available to you to assist with updating or developing your Unit plan. Specifically:

- 1) Your Unit-level reflection reports, which were completed in Fall semester 2019, provide a basis to start your planning process,

- 2) A planning resource guide, which provides guidance on how to develop a strategic plan for your Unit,
- 3) A template outlining the format for Unit strategic plans, which illustrates how the plans will be entered by the Office of Planning, Assessment, and Institutional Research into the strategic planning system, Nuventive.
- 4) A general self-review form for a final check of your draft Unit plan.

Daniel Newhart, Assistant Vice Provost of Planning in the Office of Planning, Assessment, and Institutional Research will connect with each of you between now and July 31st about your Unit plan. For assistance with or questions about your Unit plan updates and development, Daniel can be reached at dwn24@psu.edu, or by calling 814-863-8721.

All resources and documents above are available on the strategic planning website at: <https://strategicplan.psu.edu/implementing-the-strategic-plan/unit-planning/>. These resources could also help in the development of plans within your Unit which may inform your Unit-level plan.

We look forward to seeing how your work will change the fabric of Penn State as we continue to exemplify *Our Commitment to Impact* towards, and beyond, 2025.