

Unit Planning Update

Institutional Effectiveness, Research, and Planning

November 7, 2019

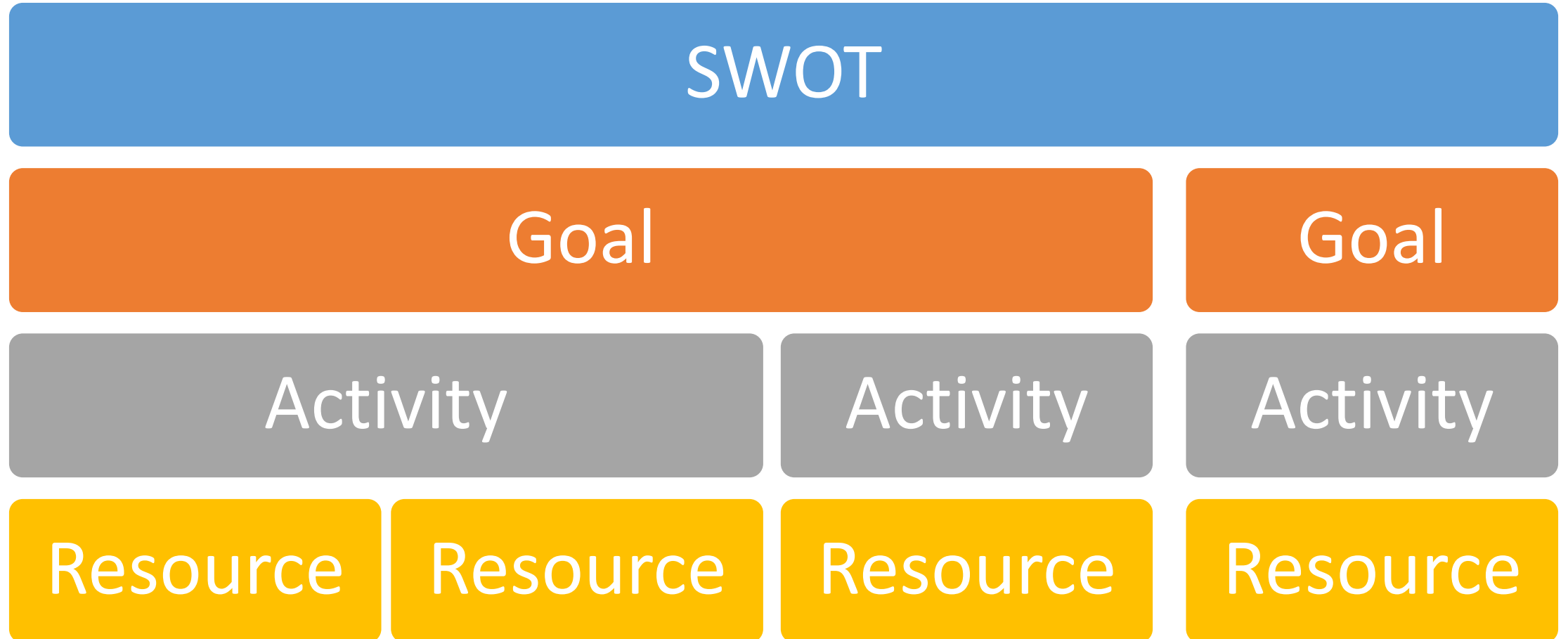
Approval process



Unit Planning, in a nutshell

- Review data
- Perform SWOT analysis on unit
 - E.g. identify strengths, weaknesses, opportunities, or threats to unit
- Add goals to SWOTs
- Add activities to goals
- Add resource requests to activities

Resource requests must clearly map to a SWOT



Starting 2020-2021 planning cycle

Rolling forward 2019-2020 goals

- The status of your unit goals determine whether plans roll forward to the next planning cycle
- Completed or Cancelled goals **do not** roll forward
- Goals that are Continued, On Hold, In Progress, or Not Started **will roll** forward
- Deadline for goal status update is November 29, 2019
- Reminder to go out tomorrow, opportunity for training sessions

Concerns with PR+ and proposed solutions

- Recurring issues with editing behavior and user interface
- Inability to undo or save temporary versions of plans
- Limited data sharing ability

Proposed solutions:

- Share Word document of “roll forward” summary with units directly
- Share a standard institutional data set with units directly
- Units update “roll forward” summary to have a working version of plan to input into PR+

Questions?

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