CURRENT SITUATION
• The University of Minnesota engages in system-wide strategic planning and goal setting.
• The University comprises programmatic and geographically diverse campuses, colleges, and units in a decentralized model.
• There is a desire for flexible, accessible resources that units at all levels can utilize to guide their planning within the framework of the University’s pillars of excellence.

PROJECT GOALS
• Identify and compile current documentation that outlines the University’s strategies, priorities, and decision-making processes.
• Identify and compile examples of successful planning processes, models, and resources.
• Prepare information and materials for development of an online planning toolkit for units.
• Make recommendations to inform toolkit design and communication strategy for its promotion.

METHODOLOGY
• Review key strategic positioning and planning documents.
• Literature review of scholarly work as well as existing University resources.
• Interview leaders, stakeholders, and scholars of planning.
• Synthesize reviewed material into a University-specific framework.
• Develop resources and worksheets for areas that are not currently available.

RECOMMENDATIONS
• Implement a toolkit that allows units to select all or part of the resources as their situation requires.
• Develop a website that avoids subpage links and layers, minimizing click-throughs and maximizing accessibility.
• Prominently feature contact information for Planning and Analysis as well as Organizational Effectiveness.
• Communicate broadly to small and intermediate size units, with an emphasis on the flexibility of this model and toolkit.

HIGHLIGHTS
• An intentional thinking and planning model putting “common sense” planning into a defined process with resources and tools.
• Supports a key component of Planning and Analysis’ Strategic Improvement Framework.

THE U 5-STEP Planning Toolkit for Campus, Collegiate, and Departmental Units

- DEFINE THE PLAN
- FOCUS AND CONTEXT
- MISSION AND ACCOUNTABILITY
- IMPLEMENTATION AND COURSE CORRECTION
- PLAN TO PLAN

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