*This is an editable template for a unit strategic planning alignment self-study. Individuals on a unit’s strategic planning committee may work together to answer these questions or each member could do so individually and then meet up to compare notes. The outcome should be a concise description of how the unit’s strategic planning vector projects onto MSU’s strategic direction and will aid the unit’s planning committee in filling out the Strategic Plan Alignment Template for submission to Planning Council by 9/15/2019. Responses to these questions are for the unit’s use and only the consensus responses in part 3 are submitted to Planning Council.*

**Part 1: Before engaging with the MSU Strategic Plan, please consider the following questions.**

In the past year, what significant areas of change and progress (including strategic planning) have been underway in this unit?

What audiences or voices have you listened to/relied on to plan in the past year?

What voices still need to be heard?

Which stakeholders in and out of your unit are influential in making your unit’s plan successful? Who is interested in your planning discussions? Who wants to be informed of the discussion?

What *existing areas of strengt*h need to be maintained?

What *emerging areas of strength* are important to the unit’s future?

What *challenges and/or setbacks* have been a concern to the unit in the past few years?

Does the unit have existing plans to make significant modifications to improve existing programs or *create new degree programs (for academic units)*?

Are there thoughts/plans to sunset any existing academic programs?

Does the unit have an expectation of growth in student numbers (undergraduate and graduate) based on active recruiting or other specific reasons?

Does the unit have plans to seek new resources to grow faculty and staff necessary to accomplish its strategic goals?

Does the unit currently participate in work that crosses organizational or disciplinary boundaries? Are there opportunities to (further) engage with other units in this planning process?

Are there any other issues or concerns that negatively affect the current and future prospects of the unit?

*End of Part 1*

**Part 2: Now turning to the new MSU Strategic Plan**

*Consider the stakeholder responses in Part 1. Members of the planning group may choose to use this next set of questions to engage stakeholders if appropriate before considering these questions as a group.*

MSU Mission Statement

*As the state’s land-grant university, Montana State integrates education, creation of knowledge and art, and service to communities.*

Does this unit participate actively in *integration* as stated in the mission? What are some examples?

Does the unit have other mission aspects, e.g., a separate unit mission statement? Please describe.

MSU Vision Statement

*Montana State University will transform lives and communities in the people’s interest.*

In what ways does this unit *transform lives and communities*? Students only? External engagement?

MSU Values

*Excellence: We pursue exceptional outcomes.*

*Integrity: We commit to honesty, ethical behavior, and accountability.*

*Inclusion: We create a civil, supportive, and respectful environment where difference and diversity are sources of strength.*

*Collaboration: We believe that working together produces better outcomes.*

*Curiosity: We expect inquiry, exploration, creativity, and innovation.*

*Stewardship: We care for and conserve the human, economic, physical, and environmental resources entrusted to us.*

In what ways does this unit affirm and recognize these values? Are there other unit values that are not represented?

The Strategic Plan has three areas of *intentional focus*. These are specific areas that MSU has decided to focus upon so that the institution can move in the defined strategic direction.

*NOTE: There are many critically important unit activities that may not fall precisely within the small number of foci, and these essential activities may remain a unit priority. Indeed, the myriad local details comprise the enduring strength of our university. We will return to those later in this process.*

The Strategic Plan focus areas are:

* INTENTIONAL FOCUS 1: Drive Transformational Learning Experiences Creating Outstanding Educational Outcomes for All Students
* INTENTIONAL FOCUS 2: Improve Lives and Society through Research, Creativity and Scholarship
* INTENTIONAL FOCUS 3: Expand Mutually Beneficial and Responsive Engagement for the Advancement of Montana

Broadly viewed, the three areas are the tripartite Land Grant mission of teaching/learning, research/discovery, and service/engagement, and they represent integration across these three.

*At this point, the members of the unit’s strategic planning committee should review the* [*goals, metrics, and actions*](http://www.montana.edu/strategicplan/) *associated with each of the three areas of intentional focus. It is recommended to do the initial unit review using the ten Goals, saving the metrics and actions for later.*

*Read each Goal carefully and reflect upon its resonance with the unit’s current activities. Take notes regarding which goals appear the most prominent for the unit now, which goals appear of importance looking 3-5 years into the future, and which goals are of less relevance to the unit. You may decide a goal is important now and in the future.*

**GOAL 1.1: Broaden access for underrepresented populations and increase academic success for all students through excellence in undergraduate education.**

* Important now?
* Important 3-5 years into the future?
* Not particularly relevant to this unit?

If important now or in the future, what are your thoughts about related unit activities that would help achieve this goal?

**GOAL 1.2: Expand high-quality graduate education**

* Important now?
* Important 3-5 years into the future?
* Not particularly relevant to this unit?

If important now or in the future, what are your thoughts about related unit activities that would help achieve this goal?

**GOAL 1.3: Implement evidence-based high quality, high impact teaching and learning practices for every student**

* Important now?
* Important 3-5 years into the future?
* Not particularly relevant to this unit?

If important now or in the future, what are your thoughts about related unit activities that would help achieve this goal?

**GOAL 2.1: Enhance the significance and impact of scholarship**

* Important now?
* Important 3-5 years into the future?
* Not particularly relevant to this unit?

If important now or in the future, what are your thoughts about related unit activities that would help achieve this goal?

**GOAL 2.2:** **Expand interdisciplinary scholarship**

* Important now?
* Important 3-5 years into the future?
* Not particularly relevant to this unit?

If important now or in the future, what are your thoughts about related unit activities that would help achieve this goal?

**GOAL 2.3: Strengthen institutional reputation in scholarship**

* Important now?
* Important 3-5 years into the future?
* Not particularly relevant to this unit?

If important now or in the future, what are your thoughts about related unit activities that would help achieve this goal?

**GOAL 2.4: Elevate expectations for scholarship**

* Important now?
* Important 3-5 years into the future?
* Not particularly relevant to this unit?

If important now or in the future, what are your thoughts about related unit activities that would help achieve this goal?

**GOAL 3.1: Increase mutually beneficial collaborations with Tribal nations and partners**

* Important now?
* Important 3-5 years into the future?
* Not particularly relevant to this unit?

If important now or in the future, what are your thoughts about related unit activities that would help achieve this goal?

**GOAL 3.2: Grow mutually beneficial partnerships across Montana**

* Important now?
* Important 3-5 years into the future?
* Not particularly relevant to this unit?

If important now or in the future, what are your thoughts about related unit activities that would help achieve this goal?

**GOAL 3.3:** **Foster a culture of collaboration, continuous improvement, and individual growth**

* Important now?
* Important 3-5 years into the future?
* Not particularly relevant to this unit?

If important now or in the future, what are your thoughts about related unit activities that would help achieve this goal?

*End of Part 2*

**Part 3: Unit Plan Alignment**

*Use consensus responses in this section to help you complete the Planning Alignment Template. Repeat these items for each aligned Goal from Part 2 above.*

Of the ten goals in the MSU Strategic Plan considered in Part 2, which appear to be in strongest alignment with unit activities and aspirations considered in Part 1? Not all goals must be addressed by this unit.

Considering the Metrics and Actions associated with the well-aligned Goals, to which can the unit most effectively contribute?

What locally-defined goal should the unit pursue that will contribute to the MSU’s goal, metric or action?

How will the unit pursue that goal? What strategies or activities that you currently engage in or want to engage in would make progress?

Among the new strategies and activities you are considering, how highly do you prioritize this one? Consider its importance relative to things you need to keep doing as well as the new things you might pursue. Consider the magnitude of impact, the achievability of the outcome, importance to the identity of the unit, or other factors that might influence prioritization.

* High
* Medium
* Low

Who in the unit will be the champion for this strategy or activity? Who will be responsible for measuring success?

How will you know if you are making progress? How often should you check for progress? When can you declare victory?

What are the obstacles to moving forward with strategies in this goal?

What feedback is needed from within the unit? Who needs to be consulted? Who needs to be informed?

What feedback is needed from outside the unit or the University? Are there partners with whom you might plan? Who needs to be consulted? Who needs to be informed?

What questions need to be addressed with the next higher level of administration? Who needs to be consulted? Who needs to be informed?

What resources do you have in the unit already that can be deployed in support of this strategy? Can you stop doing something or do something more effectively (e.g. better use of space, program planning to emphasize this strategy, streamlined processes to free up time)?

What additional resources do you need that you might request in future established budget, position, technology, or space proposals?

*Repeat the previous items in Part 3 for each aligned goal from Part 2.*

Is the unit planning to pursue goals and strategies that are not aligned with the University’s Strategic Plan? Are these essential operations? (Every unit has some work that must be completed that may be operationally necessary, and every unit may desire to make changes in the way they do that work.)

Do they conflict with your strategic goals? How might the unit reconcile these?

*For unit use only:* Is there anything else that came up in your planning discussions that the planning group needs to address? That the unit needs to address?

*End of Part 3*