UNITY ENVIRONMENTAL UNIVERSITY 2030

TOOLS FOR PLANNING AND STRATEGIC PLAN IMPLEMENTATION

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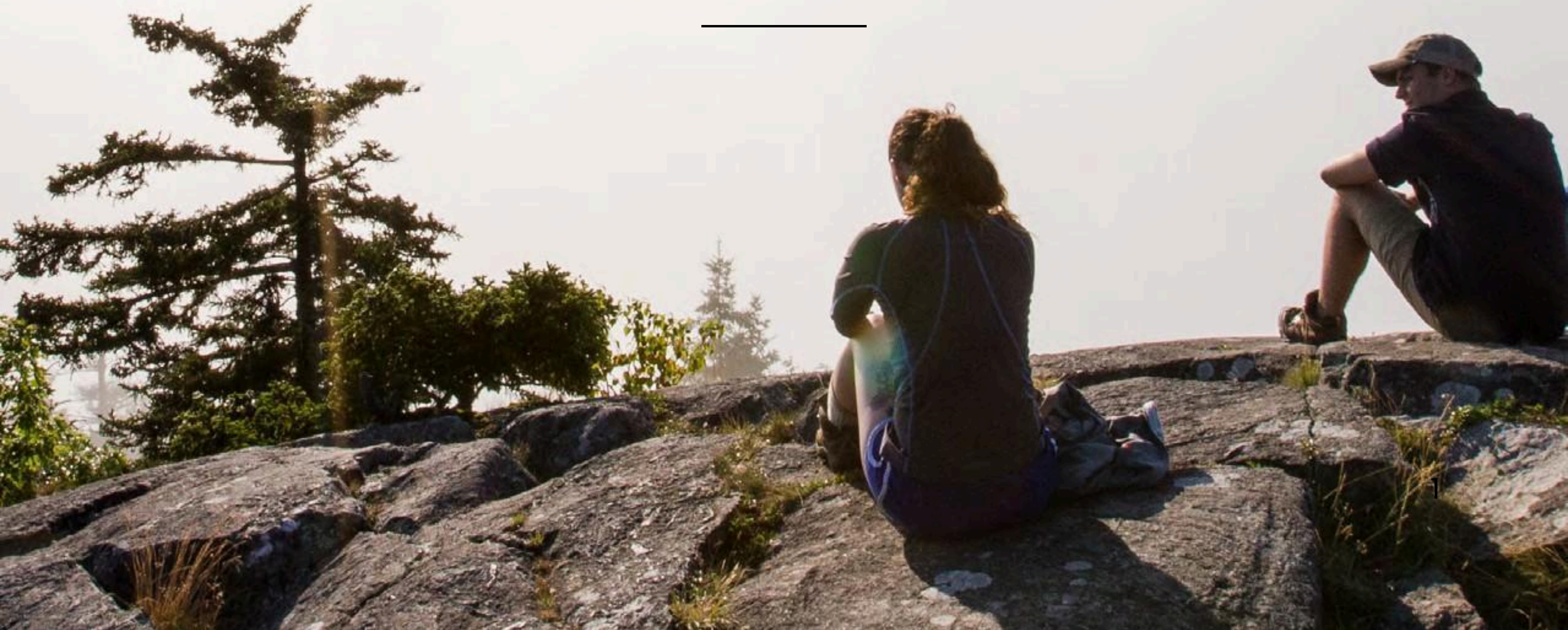

Initiative Implementation Plan

Initiative Implementation Plan. The Initiative Implementation Plan provides employees of Unity Environmental University with a template for the proposal of new initiatives. New initiative proposals will be evaluated by the President and Senior Staff employing the Strategy Screen criteria. Each initiative selected for implementation will be prioritized using the Decision-Making Paradigm and executed using part two of the Unity Environmental University Initiative Implementation Plan. At that point, The President will assign a project lead. The Implementation Plan helps the project lead, Senior Staff, and the President identify roles, resources, needs, goals, and accountability measures. It allows University leadership to plan appropriately for likely contingencies and understand decision tradeoffs and implications more thoroughly.

A standardized project implementation plan helps those proposing and executing a project better understand expectations and leads to more time spent on innovation and implementation and less time on process and gaining clarity.

The Unity Environmental University Initiative Implementation Plan is similar to other recognizable models, including the one included in the Dale Carnegie Leadership Training materials. Some of the explanatory language included in this plan is adapted from those materials.

I. PROPOSAL PHASE

1. Define Current State – Provide a very brief S.W.O.T. analysis that addresses the following questions and prompts.
    a. Background: What is the reality of the current situation for Unity Environmental University? What is our history with this sort of initiative? Where are we today?
    b. Factors: Provide information to facilitate a thorough estimate of the situation both internally and externally. What are the factors that might help or hinder our efforts and enable us to set realistic goals?
2. Describe Desired Future State – Provide a brief vision statement that provides an overview of the initiative and its value to the University that addresses the following questions and prompts.
    a. Service to Audience: How does it fit into the University's current strategic Audience-First Decision-Making Approach? What specific audience does this serve? How does it meet an identified need?
    b. Mission Driven Opportunity: What product could we offer this audience? Do any of our existing MDOs offer?
    c. Strategic Plan Alignment: How will it advance the Strategic Vision of Unity Environmental University?
    d. Goals: Why are we doing the initiative? What are the project goals to be pursued and benchmarks for success?
    e. Outcomes: What specific outcomes will we accomplish in the scope of this plan? These should be specific, measurable, and timely.

3. Identify Internal Resources Needed – In order to realistically complete this initiative and achieve the outcomes listed above, list and describe the internal and external (new and reallocated) resources necessary. Include Human, Physical, Fiscal, and Technological. If possible, include a preliminary budget outline.
4. Articulate Known Risk Factors – Identify and expand on risk factors for the initiative. What are competitor programs or products? Is the audience base big enough to support the initiative? Will failure to execute expose the University to negative publicity? Is the subject matter controversial? Will the initiative alienate anyone? Are potential partners above reproach? What happens if external resources do not materialize or evaporate? Are there legalities involved? Are there certifications or licenses involved? What are the professional standards for this type of initiative? Are there physical or technological security risks? What else?
5. Develop Action Items & KPIs – Create a list of actions that must be done to support the project goals listed above. Be specific, but do not get into the details at this point.
    a. Do get this specific: "Action: Create a web site for business transactions, marketing, program description, and policy communication. Key Performance Indicator: Web site will be approved by president, linked to Unity Environmental University web site, and communicated through internal email, social media, and press release."
    b. Do not break each one of those pieces down further into sub parts.
6. Chief Officer and SEBU Leads submit proposal to Senior Staff for application of Strategy Screen criteria (if endorsed, move on to next step). SEE BELOW FOR STRATEGY SCREEN.

II. AFTER GREENLIGHT

1. Develop a detailed Project Implementation Plan that accounts for each numbered element below.
2. Build an action plan which is…
    a. Coordinated: Develop an action plan in consultation with implicated work units and individual positions. Make sure to address 1) The requirements for achieving the set goals;
    2) Who will do which part off each job; 3) How the different parts tie together; 4) The conditions that help and hinder goal achievement; 5) Timing – calendar and project-relative timing when plans and ideas are to be put into effect; 6) How all functions are to be coordinated properly.
    b. Specific: Develop a project action plan that includes a list of action steps that are tied directly to stated initiative goals. Include which goal is supported; a project-relative start date (T minus X); a deadline; who has primary accountability (one title per action); and a measure of success.
    c. Measurable: Develop a project evaluation plan that is carefully aligned with initiative goals and outcomes, is measurable, timely, meaningful, and achievable. Each individual measurement should include the goal supported, the measure, the means of measurement, who is responsible for taking the measurement, and who receives the report. Develop/Adjust Necessary Documents. Propose additions or adjustments to all University .

3. Create a communication plan for university and broader audiences.

A communication plan should include…

a. Audience: All audiences to be included, internal and external.

b. Goal: The nature and purpose of the communication for each audience. Why do we want to alert them? For marketing purposes? To maintain accreditation? To raise money?

c. Media: How each audience best communicates, e.g., email, letter, website, social media, press release, web-based information form, flyers, postcards, etc.

d. Message: The key message for each audience. What does this audience care about? What do they need to know? What is the call to action or the ask for each audience?

e. Content: Draft language for each messaging point above. Include actual or sample photographs that will help with the communication.

f. Communication Timeline: When (absolute or relative timing) does each audience need to get the message or messages planned. Provide a timeline of message delivery dates that includes the communication title, the media type, the messaging purpose, and the content.

4. Use the ACT approach to execute, monitor, and improve the initiative

   The ACT process is employed to guide initiative implementation ensuring alignment with strategic goals and ensuring that initiatives are implemented effectively and can evolve to meet changing needs

   The ACT process steps:

   - Act: This phase involves the implementation of the planned actions based on initial strategic objectives and resource allocation (action plan)
   - Check: Regularly evaluate progress by comparing actual outcomes with expected results. Use KPIs and milestones to assess success and identify areas for improvement.
   - Transform: Make significant adjustments based on the results of the Check phase, transforming the initiative to improve its effectiveness in meeting the University's goals and objectives, This step emphasizes meaningful refinement and adaptation in the spirit of continuous improvement

Strategy Screen

A responsive and iterative approach to strategic planning requires prior agreement on principles by which any new idea may be efficiently assessed. A Strategy Screen is a set of criteria that Senior Staff and the President use to choose whether or not a new initiative is consistent with University identity and strategic direction. See Implementation Plan for details regarding the proposal of new initiatives for consideration.

e 1: Strategy Screen

Decision-making paradigm

The decision-making paradigm is designed as an articulation of University priorities to be applied during the decision-making process. When a choice must be made between competing alternatives, deference is given to elements of greater priority. Unity Environmental University prioritizes the element of audience above all else. The chart below outlines University decision- making priority from the largest encompassing circle (audience) to the most embedded circle (Unit).
Elements inside another element are in a subservient and service role to that element. So, Unit serves Function serves Modality serves MDO serves Audience.
Audience drives all else.

Constituent Roles

Constituencies

Figure 2: Decision-Making Paradigm

Purpose

This document outlines the current initiative to review, clarify, and realign how Unity Environmental University defines and applies constituent roles within its operational and data systems. The misalignment between the constituent categories outlined in the strategic plan and those used in systems such as DonorPerfect and now Stratus has introduced risks to data integrity, communication workflows, and institutional reporting.

As Unity utilizes the Stratus enterprise platform, a clear and consistent framework for constituent types is essential to support clean data migration, user experience, and strategic alignment.

Background

Unity Environmental University's strategic plan identifies key constituent categories foundational to its mission and operations: Learners, Consumers, Clients, Partners, Foundations, Investors, and Donors.

However, turnover in leadership and functional areas has led to uncertainty about whether subsequent changes to constituent roles in legacy systems were deliberate evolutions or deviations from the strategic plan. This ambiguity has created confusion in how individuals and organizations are categorized—especially when a person or entity fits more than one role.

The Strategic Plan Toolkit defines most constituent types but provides limited guidance on hierarchy, role prioritization, or practical use across systems. It was also determined at the April 10, 2025 Art of the Possible meeting that additional constituent categories were needed. With Stratus now implemented, efforts have shifted toward streamlining, automating, and enhancing its functionality, making it critical to resolve discrepancies in constituent roles.

Why It Matters

Constituent roles are foundational to how the University tracks engagement, measures outcomes, delivers services, and communicates with stakeholders. Misclassification leads to:
- Redundant or contradictory communications
- Fragmented records and incomplete histories
- Inefficiencies in reporting and compliance
- Misalignment with the strategic plan

Clarifying and standardizing these roles will support data governance, improve the constituent experience, and ensure that systems like Stratus can be used as intended.

Constituency Definitions

Type	Definition	Clarifying Notes or Examples
Learner	Individuals enrolled in formal, for-credit experiences or informal experiences with learning goals.	This population can encompass students in Title IV-eligible programs as well as non-degree or non-credit offerings.
Employee	Individuals employed by Unity, including faculty, staff, and student workers.	Includes full-time, part-time, temporary, and student roles.
Alum	Individuals who completed a degree program at Unity.	Specific to credentials where a degree, such as an associate's, bachelor's, or master's degree. Completers of certificates and micro credentials are excluded from this category.
Consumer	Individuals purchasing a product or service in a simple transaction.	Examples include goods and services from the University store, McKay Farm, and Sky Lodge.
Client	Individuals or organizations paying for services or goods from Unity.	An example might include a non-profit organization contracting with Unity Environmental University for leadership training.
Partner	Organizations engaged in mutually beneficial and collaborative work at Unity.	Partnerships typically require a memorandum of understanding or other legal articulation and go beyond simple transactions.
Foundation	Organizations distributing funds based on outcomes and proposals.	Typically distributes funds through formal grant cycles with required reporting on outcomes.
Investor	Individuals or organizations expecting a return on investment.	Provides funding with the expectation of a defined return—financial, reputational, or impact-based.
Donor	Individuals or organizations offering gifts in support of Unity's mission.	Stewardship expectations apply but are not explicit and specifically accounted for in terms of return on investment.
Vendor	Organizations contracted to provide goods or services to Unity.	These relationships are governed by purchasing agreements and are often evaluated based on performance, cost, and alignment with institutional priorities.
Trustee	Elected board members with fiduciary and strategic oversight of Unity.	Members are elected by a majority of the trustees currently in office.

Prioritization of Individual Accounts

The labels **current**, **former**, and **prospective** help determine an individual's **primary constituency** type. This primary type—based on the highest-ranking role assigned to the individual—should be used for broad communications such as marketing or university engagement emails. Additional roles may be referenced for targeted or role-specific messages.

1. Current Trustee
2. Current Learner
3. Current Alum
4. Current Employee
5. Current Consumer
6. Current Client
7. Current Investor
8. Current Donor
9. Former Trustee
10. Prospective Trustee
11. Prospective Learner
12. Former Learner
13. Prospective Client
14. Prospective Investor
15. Prospective Consumer
16. Prospective Donor
17. Former Client
18. Former Investor
19. Former Donor
20. Former Consumer
21. Prospective Employee
22. Former Employee

Prioritization of Organization Accounts

For organizations, the labels **current**, **former**, and **prospective** also determine the **primary constituency type**. When an organization is assigned multiple roles, the role with the highest priority ranking should be used for general outreach. Secondary roles may inform targeted or role-specific communications.

1. Current Client
2. Current Foundation
3. Current Investor
4. Current Donor
5. Current Partner
6. Current Vendor
7. Prospective Client
8. Prospective Foundation
9. Prospective Investor
10. Prospective Donor
11. Prospective Partner
12. Prospective Vendor
13. Former Client
14. Former Foundation
15. Former Investor
16. Former Donor
17. Former Partner
18. Former Vendor

Next Steps

To operationalize this framework, the following actions are needed:

- **Configure Constituent Types in Stratus:**
  Add the formalized constituent types to Stratus, enabling accurate assignment at the account level.

- **Support Primary and Secondary Role Assignment:**
  Establish functionality within Stratus to differentiate between an individual’s or organization’s primary role and any secondary roles.

- **Enable Segmentation in Messaging Platforms:**
  Ensure constituent roles can be leveraged in platforms such as Account Engagement or Marketing Cloud to build segmentation lists and tailor message content based on role.

- **Integrate into Institutional Culture:**
  Promote consistent use of these roles across units to guide how we describe and engage with individuals and organizations institutionally.

- **Strengthen Individual–Organization Connections:**
  Improve the ability to track and report on relationships between individuals and organizations within Stratus, using constituent roles to define the nature of those connections.

Mission Driven Opportunity

A mission driven opportunity (MDO) is the “What” associated with a particular audience. MDO is secondary to audience, but above all else in terms of priority in decision making. A MDO is a Unity Environmental University response to the clearly identifiable need of an audience segment. A MDO may be an experience, a product, a service, or other. The more clearly the need is articulated and demonstrated, the better for the purposes of addressing it with an MDO.

Modality

Modality is determined as a function of preferred means, venue, or medium for a particular audience segment. Modality answers the “how” question for a particular audience.

Function

A task, process, or an area of responsibility that may include coordination of other units with regard to the project or issue under consideration. Function describes what is needed to meet the initiative outcomes.

Unit

Unit is the department, office, school, or even in some cases individual role responsible for meeting the initiative outcome. Units may be considered sub-functions.

Strategic Plan
Management Protocols – Final Draft

In developing a new strategic plan for Unity, it is essential to define the terms "goal," "objective," and "initiative," as these will guide our resource allocation and strategic focus.

- A **goal** represents a broad, overarching target which will have a minimum, repeatable annual operating budget of $5 million, reflecting its significant impact on our long-term vision. These goals serve as the foundation for our strategic priorities and drive major organizational efforts.
- An **objective** is a specific, measurable outcome that supports the achievement of a goal. Objectives must meet a minimum, repeatable annual operating budget of $2.5 million.
- An **initiative** refers to a concrete project or MDO designed to advance an objective, with a minimum, repeatable annual operating budget of $500,000. Any endeavor requiring an operating budget lower than $500,000 will be classified as regular work and will not be included in the strategic plan, ensuring that our strategic efforts focus on substantial, impactful activities that align with our organizational mission.

Definitions

“The Unity Environmental University Strategic Plan” will mean the comprehensive Strategic Plan Document including background information, assumptions, rationale, and mission alignment, as well as the overarching goals of the plan. The document will be called “Unity Environmental University Strategic Plan 2030”

“Strategic Implementation Plan” will mean the project management plan designed to assess, track, and manage successful implementation of the Unity Environmental University Strategic Plan.

“Document of record” will mean the latest adopted version of the Unity Environmental University Strategic Plan Implementation Plan as a file in the *project management software*. The *document of record* will be named “UnityStrategicPlan(MM_DD_YYYY)”.

“Project management software” will mean the software package used to manage the *document of record*
and will be determined by the President. The document of record will be posted.

“Document of record content” will mean accurate content derived from the *document of record*.
“Changes version” will mean the edited version of the *document of record* edited to include proposed changes prior to a BOT or CEO decision and will be called “UnityStrategicPlan(PROPOSED_MM_DD_YYYY), where the date is the date of the last accepted changed.

“Goals” are the first level of planning as adopted by the Board of Trustees.

“Objectives” are the second level of planning. They support *Goals* and will be determined by the President and CEO.

“Initiatives” are the third level of planning. They support *Objectives* and will be recommended by Sr. Staff.

“Item” will refer to an individual Goal, Objective, or Initiative.

“Item entry” will refer to the individual elements that constitute the content of an *item*. Managed, monitored, and communicated *item entries* will include *Task Description, Complete/Incomplete, Lead Employee, Resource, Start Date, Finish Date,* and *Measure of Success*.

“Changes” will mean any substantial changes to the *document of record* and will include non-trivial changes to task names, resource allocations, start/finish dates, measures of success, and numbering of Goals and Objectives.

“Editorial changes” will mean any changes to spelling, grammar, coding, numbering of Initiatives and Actions, or other trivial edits to the document for understandability. Where there is a question, the President will decide what counts as an *editorial change*.

“Unity Environmental University Strategic Plan Project Manager” is the Unity Environmental University President or designee. The Project Manager is responsible for 1) monitoring and communicating with President and project leads regarding the overall progress to the Strategic Plan, 2) receiving, recommending, and managing proposed changes to the *document of record*, 3) making editorial changes to the *document of record,* and 4) providing accurate, readable versions of the *document of record*.

“Effort Level” is the amount of effort required to complete an item relative to other items at the same level of planning. Effort Level may be viewed as a “weight” assigned to items and is used to help gauge completion percentages.

Change procedures for *document of record*

Changes to Goals:

1. Goals are periodically reviewed by the President/CEO and the Board of Trustees for relevance and adjusted as needed.

Changes to Objectives

2. The President/CEO periodically reviews objectives and adjusts them as needed in order to meet the established goals.

Changes to Initiatives

3. Senior Staff recommends changes to Initiatives to the President/CEO in order to meet the established Objectives and Goals.

Communication Procedures

1. Only content from the *document of record* will be used for internal or external publication and communication. Content from a *change version* may be shared for planning purposes but will not be considered adopted until it has gone through the appropriate change process above.
2. The Project Manager is responsible for ensuring accurate content for all reproductions and will be responsible for providing access to the *document of record* and *document of record content* as appropriate.
3. Completed items will be permanently included in all subsequent versions.

Progress Calculation Procedures

1. Calculating progress is based on outcome achievement and involves a systematic approach to measure the effectiveness and impact of activities against predefined goals
2. For each major outcome or objective, break it down into smaller, time-bound milestones. These milestones should represent significant stages in the journey toward achieving the final

outcome.

3. Define what success looks like for each milestone in terms of measurable KPIs. These KPIs should directly reflect progress toward the milestone and, ultimately, the final outcome.
4. Evaluate Milestone Achievement
    a. Quantitative Evaluation: For quantitative milestones, calculate progress using similar methods as outcome KPIs. For example, if the milestone is to complete 50% of a project task, measure how close you are to that percentage.

    Milestone Progress(%)=Current Value/Milestone Target ×100

    b. Qualitative Evaluation: If the milestone involves a qualitative goal (e.g., stakeholder engagement or completing a report), use checklists or scoring rubrics to evaluate the quality and completeness of the work.
5. Incorporate Milestone Progress into Overall Outcome Progress
    a. Cumulative Impact: As milestones are completed, calculate how they contribute to the overall progress toward the final outcome. For example, completing a milestone might represent 20% or 40% progress toward the final outcome, depending on its relative importance.
    b. Weighted Milestones: Assign different weights to milestones based on their significance. Major milestones (e.g., 50% project completion) should contribute more to the overall progress calculation than smaller tasks.
6. Since they have no sub-items, *Initiative Item* progress toward completion will be established by the *Goal Lead Employee*.

Progress Reporting Procedures

1. Progress toward completion of strategic plan items at all levels will be reported to Senior Staff at least quarterly. All employees responsible for strategic plan items should be involved in reporting progress. The Board of Trustees will receive any and all Strategic Plan updates from the President.
2. Consistent, timely, and thorough reporting ensures transparency of the strategic plan process. A public facing “dashboard” will display progress on *Goals* and *Objectives*. The complete progress report will also be made available to the public. The *Project Manager* is responsible for updating the progress dashboard.