

THREE YEAR PLAN REVIEW Unit Presentation Outline – Budget Review Meetings Academic Units

We continue to move towards an integrated budget model that supports institutional goals and the strategies we have developed to achieve these goals. The Unit Budget Review Meetings provide the forum to improve our understanding about how each unit contributes to those goals and how the resource allocation process can further our capacity to attain unit and university goals. Below are the areas of focus and corresponding questions you might consider as you develop your presentation:

- ***Strategic Priorities*** - What are your unit's 3-5 highest priorities? How do your priorities relate to institutional goals? How have you developed these priorities and communicated them with faculty and staff in your unit?
- ***Enrollment Plan*** – How does your enrollment plan align with your strategic priorities? How does your enrollment plan help shape your faculty hiring strategy? What is the impact of the new tuition revenue sharing rules on your ability to achieve your enrollment plan?
- ***Faculty and Staff Hiring*** – How does your faculty and staff hiring plan align with your strategic priorities? What are the areas you are targeting for faculty and staff growth and why? How would you characterize the quality of the faculty hires you have made over the past three years? What explains any variances between actual and planned faculty and staff hiring? What changes are required in your hiring plan as the result of the changes in tuition revenue sharing for the next two fiscal years?
- ***Achieving Student Learning Outcomes*** – How would you characterize your effectiveness in achieving established student learning outcomes in your educational programs? How are resources deployed to enable the full achievement of student learning outcomes?
- ***Research, Scholarship and Creative Activity***– What are your goals for research, scholarship and/or creative activity? How do/will you invest in these activities? How will your faculty hiring plan improve your ability to achieve these goals? What infrastructure requirements do you have to achieve these goals?
- ***Capital Projects and Space Needs*** – What is your current space utilization? What are your capital project and new space needs? How do these relate to your strategic priorities, hiring plans and unit efficiency efforts?
- ***Financial Condition*** –What is the financial health of your unit? If you have concerns about your financial health, what are the causes? What are your plans to address those concerns? What reserves do you have and what are the plans for those reserves? Does your unit have unutilized or underutilized endowment funds and if so, what are your plans to use those funds more effectively? What is your spending plan for 2015/16?
- ***Efficiency*** – What efforts have you undertaken to achieve a more efficient use of available resources? To what extent have you explored shared services with other units?
- ***Assessing Success*** – What are the metrics that best define your contribution to institutional goals? What is your assessment of your standing in relation to your peers in these areas? What are the strengths and weaknesses of your organization? How is your three-year plan designed to build on strength and minimize weaknesses?
- ***Plan Modifications and Investments*** – What changes would you propose to your three-year plan through FY 17/18? How are your resources working to achieve your plans? How have the investments from the 2014/15 process improved your contribution to university goals and addressed to the strategic priorities of your unit?