

THREE YEAR PLAN REVIEW
Unit Presentation Outline – Budget Review Meetings
Academic Support 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 to staff within your unit?
- ***Staffing Levels*** – How is the staffing in your unit aligned with institutional goals? How do you determine staffing needs? How are your staffing levels compared with peer institutions? What explains any variance between actual and planned staffing levels?
- ***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? What is your 2015/16 Spending Plan?
- ***Efficiency*** - What efforts have you undertaken to achieve a more efficient use of available resources? Are there opportunities to partner with other university offices or SUNY institutions to deliver services in more innovative and efficient ways? To what extent have you explored shared services with other units?
- ***Assessing Success*** – What metrics do you use to assess how your unit enables UB to achieve its goals? What is your standing in relation to your peers using these metrics? What are the strengths and weaknesses of your organization? How is your three-year plan designed to build on your strengths and minimize your 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?