

Linking Strategic Planning, Budgeting and Assessment

September 10, 2009

UNIVERSITY PLANNING








"I am committed to a budget process that is about strengthening trust, reflecting our values and producing outcomes. Our resources—human, physical and financial—are the primary tools for achieving our vision."

Rosemary DePaolo

November 30, 2006

Keys to Linking Planning, Budgeting and Assessment

- **Link to strategic priority** 
- **Expected outcomes** 
- **Success measures** 
- Timeline
- Track success

UNCW Strategic Priority 2009-2011

Enrich the intellectual climate and the student experience.

- Improve student-faculty/staff interaction and rigor in academic experiences.
- Enhance the inclusiveness, civility, respect, integrity and safety of the university community.

A Hypothetical Example

UNCW

Enrich the intellectual climate and the student experience.

UNC – X

Increase efficiency in programs and services by maintaining or enhancing performance at lower cost.

Budget Instructions

“Another change to the process is the emphasis on progress measurements to evaluate success. Simply stated, allocation of future resources will be dependent on adequate justification that includes quantifiable measurements to determine success (or failure) of the particular program over time.”

~~Outcome measures~~

Expected Outcomes

~~Successful measures~~

Success Measures

Expected Outcomes

- What will happen as a result?
- What will the impact be?
- What will change?
- How will things get better?
- What is the benefit to the university?

A Hypothetical Example

UNC – X

Strategic Priority: Increase efficiency in programs and services by maintaining or enhancing performance at lower cost.

Budget Request: Five new multifunctional copiers, total \$25,000, to replace five existing copiers

Expected Outcomes:

- Enhanced service through enhanced functionality (more features, color availability, faster copying)
- Reduced cost through a savings of 2 cents per copy
- Savings will exceed purchase price within 12 months

Success Measures

- How will we measure impact of the expected outcome(s)?
- How much will things improve?
- (Ideal) What is the numerical indicator now, and what will it be after the impact of this investment?

A Hypothetical Example

UNC – X

Strategic Priority: Increase efficiency in programs and services by maintaining or enhancing performance at lower cost.

Budget Request: Five new multifunctional copiers, total \$25,000, to replace five existing copiers

Success Measures:

- Total copies per month for each replaced copier
- Total savings per month for each replaced copier, expected to be \$2000/month

Whole Group Activity

UNCLe **REQUEST 1 of 4**

Strategic Priority: Increase efficiency in programs and services by maintaining or enhancing performance at lower cost.

Budget Request: Replace all classroom lighting with Energy Star qualified lighting.

Expected Outcomes: If we don't do this, we won't qualify for LEED Certification.

Success Measures:

- Monthly energy savings in KWH
- Monthly energy savings in \$

Whole Group Activity

UNCLe **REQUEST 2 of 4**

Strategic Priority: Increase efficiency in programs and services by maintaining or enhancing performance at lower cost.

Budget Request: Replacement of Chancellor's Office gas-powered golf cart by an electric golf cart.

Expected Outcomes: Decreased energy costs.

Success Measures: Noise level reduction from 60 decibels to 35 decibels

Whole Group Activity

UNCLe **REQUEST 3 of 4**

Strategic Priority: Increase efficiency in programs and services by maintaining or enhancing performance at lower cost.

Budget Request: Two new nursing faculty positions.

Expected Outcomes: Increased student-faculty interaction and improved student-faculty ratio that will qualify UNCLe for NLN accreditation.

Success Measures:

- Average class size will decrease from 26 to 20.
- Student-faculty ratio will decrease from 11.2 – 1 to 9.9 - 1

Whole Group Activity

UNCLe **REQUEST 4 of 4**

Strategic Priority: Increase efficiency in programs and services by maintaining or enhancing performance at lower cost.

Budget Request: Digitize all student health records.

Expected Outcomes: Faster service in the Health Center, more reliable data on health services, lower insurance premiums for students, elimination of records specialist position

Success Measures: Average service response time; insurer's evaluation of data reporting; student premium level; staff salary/benefits savings of \$35,000 annually.

Expected Outcomes and Success Measures for This Workshop

Expected Outcome: Increased understanding of planning/budgeting/assessment, resulting in an increased proportion of budget requests that fulfill the two required conditions (expected outcomes and success measures)

Success Measure: Increase the percentage of budget requests meeting both conditions from the current 14%, with a target this month of 70% and a long-term target of 100%

Questions/Comments?

Breakout Group Activity