

STRATEGIC PLANNING TASK FORCE END OF YEAR REPORT

Task Force Name: Integrated Planning

2015-16 TASK FORCE WORK:

April - May 2016 Meeting Schedule:

With the subcommittee work completed, the co-chairs are in the process of compiling a list of final initiatives. In addition to several one-on-one meetings, the co-chairs are meeting with key stakeholders in order to better align the initiatives with currently available resources.

Subcommittees convened, if applicable:

Three subcommittees were formed to include Unit Integration, Budget Planning, and Workforce. Subcommittee work has been completed for the 2015-16 year.

Summary of work completed:

The beginning of the year resulted in the completion of a planning inventory which included functional units to include financial planning, technology, facilities, student services, residence life, and workforce. With this information, the Integrated Planning Task Force divided its work into three main areas and assigned a subcommittee to each category. Areas of focus included unit integration, budget, and workforce. The initial charge of each subcommittee follows:

Unit Integration

- Examine current institutional practices of linking unit level outcomes to St. Thomas 2020
- Identify alternative approaches to connecting unit level outcomes to an institutional strategic plan
- Make recommendations to continue or strengthen connections between units and the larger institution

Budget Planning

- Explore strengths and weaknesses of the current budget process at the university
- Identify alternative budget models with an emphasis on identifying strengths and weaknesses
- Identify best practices at benchmark institutions
- Prepare comparative analysis with St. Thomas as the focal point
- Suggest possible process for considering changes to the budget process

Workforce

- Explore strengths and weaknesses of current position control activities underway at the university
- Examine current staffing levels across functional units within the university and identify potential metrics to assess efficiencies and minimize duplicative efforts
- Identify strengths and weaknesses in programs in place to manage salary and wage equity at the institution
- Examine past 'One University' initiatives and identify areas where workforce communication and collaboration may be improved.

Over the course of late fall and winter, the three subcommittees completed the following work:

The Unit Integration Subcommittee has drafted three initiatives for consideration by the full taskforce:

- Ensure open communication regarding the potential impact strategic initiatives will have on units within the community
- All units will prepare annual reports describing progress toward the strategic initiatives with content pertaining to outcomes, resources, and collaboration being circulated campus-wide
- Ensure ongoing communication between academic and administrative units campus-wide regarding new initiatives so that unit level impact is understood and managed

The Budget Subcommittee has completed the following work:

- Completed a SWOT analysis and interviewed 32 stakeholders to explore strengths and weaknesses of the current budget process at the university
- Researched and shared alternative financial management/budget systems in use in higher education
- Contacted and compiled information from several benchmark institutions in order to better understand alternative processes.

The Workforce Subcommittee completed the following activities

- Explored strengths and weaknesses of current position control activities underway at the university
- Examined current staffing levels across functional units within the university and identify potential metrics to assess efficiencies and minimize duplicative efforts
- Identified strengths and weaknesses in programs in place to manage salary and wage equity at the institution
- Examined past 'One University' initiatives and identify areas where workforce communication and collaboration may be improved.

Each subcommittee delivered a final proposal to the full task force in mid-March for comment. Each subcommittee considered the comments and made revisions if applicable. A final set of initiatives were then delivered to the co-chairs on April 15, 2016.

Currently, the co-chairs are aggregating the initiatives with the intent of minimizing duplication and linking proposed initiatives to current projects where applicable. In addition, they are consulting with primary stakeholders who would be responsible for allocating resources toward these initiatives. This process will result in a comprehensive and viable set of initiatives being made available to SPOC per standard protocol.

Events held, if applicable:

Taskforce and subcommittee meetings supplemented by face-to-face meetings with key stakeholders.

Plans for submitting and disseminating recommendations or results from 2015-16 work:

A final set of comprehensive initiatives and supporting documentation will be delivered to the SPOC co-chairs no later than June 1, 2016.

Please attach any documents that you would like to release for wider community review at this time.

2016-17 TASK FORCE PLANS

Will your task force continue work past May 10th, 2016? Yes No

If yes:

Planned summer work:

We anticipate members of this taskforce will be tasked with completing the initiatives developed this past year. As such, we do not see a need to continue on as a taskforce.

Membership/leadership change requests for 2016-17:

Not applicable

Proposed timeline for 2016-17:

Not applicable

Changes in resource needs:

Not applicable

Please describe any need/opportunity for additional community input that you anticipate for Fall 2016.

The co-chairs of the taskforce would like to work with the co-chairs of SPOC in order to assure there is an emphasis on implementing the integrated planning framework as proposed. We believe this will result in a greater level of transparency and improve communication throughout the university community. As such, taskforce members may be useful additions to other taskforces that will be continuing their work into 2015-16.