

**Academic and Administrative Prioritization**

**Summaries of Committee Structure, Processes and  
Evaluation Criteria from other Canadian Universities**

**October 9, 2013**

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## **Prioritization**

### **What does prioritization mean for UNB?**

In our Strategic Plan, we stated:

- “we will support academic programs that are engaging, challenging and relevant”
- “we will develop the best structural arrangements of our various academic units in support of our programs”
- “we will develop and refine our administrative processes and organization in order to efficiently and effectively support our administrative and advancement activities”

To support these objectives, we will develop an integrated process to examine our academic programs and the structure that houses them as well as evaluating administrative and advancement processes and organization.

A variety of Canadian universities have undertaken similar initiatives. This document summarizes the processes used to stimulate the discussion of the UNB process. Notably, most others have focused solely on academic programs – our process, like Guelph’s, will include administrative programs.

## **Ryerson University**

[http://www.ryerson.ca/provost/planning/planning\\_initiatives/academic\\_structure/structures\\_commission.html](http://www.ryerson.ca/provost/planning/planning_initiatives/academic_structure/structures_commission.html)

### **8-month academic restructuring process**

1. Created a generic email address for submission of comments, ideas and suggestions
2. Conducted two town hall sessions with intent of explaining process and respond to questions, concerns and received suggestions
3. Prepared a discussion paper which was circulated to the university community
4. Conducted a town hall where Commission members welcomed input on the discussion paper and the topic in general
5. Prepared a Green Paper that contained the Commission's preliminary restructuring scenario. This was then circulated to the university community.
6. Held a Town Hall in which the Green Paper was presented and discussed
7. Prepared a White Paper that contained the recommended restructuring scenarios.
8. Presented the recommendations to the Provost, Senate, Board and university community.

Throughout the process, meetings were held with other groups in response to invitations.

### **Commission Membership**

- 1 librarian
- 7 professors
- 3 directors who were also professors
- 1 dean
- 1 research chair
- 5 chairs who were also professors
- 3 undergraduate students
- 2 graduate students
- 1 alumnus
- Commission chair
- Commission administrator

### **Evaluation Criteria – Faculties or Departments**

- Congruency or "fit"
- Legitimacy
- Quality of programs
- Strategic opportunities

- Administrative and operational efficiency
- Financial viability
- Growth opportunities
- Interdisciplinary/multi-disciplinary activities
- Single-discipline professional faculties
- Acceptability

# **Carleton University**

<http://www1.carleton.ca/provost/ccms/wp-content/ccms-files/AARCFinalReportNov17.pdf>

## **Four Pronged Consultative Approach**

1. Invitation to present to committee in person
2. Invitation to submit a written statement to the committee
3. Town Hall meeting to present the interim report
4. Direct feedback via email and the website

\*\*The MacOdrum Library conducted a bibliography on academic restructuring. The bibliography was then analyzed and reviewed by a Carleton graduate who was hired for this purpose.

## **Committee Structure**

- Chair – Provost and Vice-President (Academic)
- Interim Vice-President (Research & International)
- Professor, Faculty of Arts and Social Sciences
- Professor, Faculty of Science
- Professor, Sprott School of Business
- Professor, Faculty of Engineering and Design
- Professor, Faculty of Public Affairs
- Professor, Faculty of Graduate Studies and Research
- Director of Admissions
- Staff, Faculty of Arts
- Staff, Department of University Communications
- President, Graduate Students' Association
- Staff, Office of Provost and Vice-President Academic (Secretary to Committee)

## **Mandate**

- Examine structure of Faculties and programs to find ways of aligning Carleton's academic offerings with the goals and objectives laid out in "Defining Dreams"
- The Committee will explore opportunities for greater collaboration and cohesion among Faculties and programs that will allow Carleton to support more future-oriented, interdisciplinary and innovative academic programming that is both locally-based and globally oriented

## **Principles for restructuring**

- Promote the goals of "Defining Dreams" based on: the interdisciplinary themes and the four pillars

- Facilitate the development of innovative academic and professional programs
- Foster a strong research culture and build Carleton as research-intensive university
- Integrate teaching and research within the fabric of the university, at both the undergraduate and graduate levels
- Promote opportunities for interdisciplinary and inter-Faculty collaboration
- Encourage and reward innovation and revenue generation
- Strengthen and expand graduate studies and the research profile and reputation of Carleton
- Promote internationalization and the global identity of Carleton
- Facilitate the development of new partnerships
- Facilitate the collaboration with other institutions of higher education and expand opportunities for lifelong learning in the Ottawa-Carleton region
- Maximize the most effective and efficient use of resources to advance Carleton's academic goals and objectives
- Present the academic activities and priorities of the university in a more positive light, and make it more attractive to potential investors and donors
- Meld traditional vertical decision-making units with mechanisms for horizontal planning and decision-making
- Strengthen and enhance Carleton's reputation as a university of choice: for students; investors in education and research; organizations seeking partnerships and collaborative initiatives to solve real world problems; and employers seeking the best and most creative students

### **Best Practices**

Based on report prepared in 2009 by the Hanover Research Council – Academy Administration Practice for Carleton University, best practices in academic restructuring are:

- Invite stakeholder participation through proposals, open forums, committees, etc.
- Develop strategies for communicating goals and intentions to the wider community, and build in an adequate period for consultation and feedback.
- Invest in leadership development to ensure that administrators at all levels are capable of effectively contributing to and managing a restructuring transition.
- Commit to transparency, including by posting all relevant strategy and process documents on the university website.
- Develop an interdisciplinary agenda that draws from existing, emerging innovations and supplements existing disciplinary strengths, without threatening the latter.

- Provide clear and timely information about staff restructuring and avoid staff redundancy whenever possible.
- Take care to explain how and when restructuring will no significantly impact the lives of staff members and students, and work closely to assist those in the minority who will be significantly affected.
- When redesigning curriculum, consider the national and international portability of any new credential system.



# University of Regina

<http://www.uregina.ca/president/assets/docs/PVPA%20docs/Evaluation%20Framework.pdf>

## Evaluation Criteria and corresponding scoring system

- Program relevance – assess faculty/department’s relevance to student needs and their responsiveness to changing needs
- Program demand – assess demand for faculty/department’s programs
- Capacity to deliver – assess extent that faculty/department has capacity to deliver programs to effectively address current and expected student needs
- Financial impact – determine the contribution of the faculty/department to the overall fiscal affairs of the University
- Learning and research outcomes – determine faculty/department’s relative effectiveness in teaching, research and creative contributions
- Wider benefits – determine overall benefits and value of faculty/department to the university and public
- Future opportunities – identify innovative ideas of value to the faculty/department and University’s future

## Program Relevance

Evaluation topic	Data Collection	Scoring
What are the goals or learning objectives for the program?	Questionnaire to deans/department heads	no scoring
What academic supports are provided for students in the academic unit?	Questionnaire to deans/department heads	no scoring
Are there effective processes to ensure the curriculum is structured to address the program’s goals/objectives and to remain current?	Questionnaire to deans/department heads	<ul style="list-style-type: none"> <li>▪ strong – clear and substantial evidence</li> <li>▪ adequate – some evidence</li> <li>▪ weak – little or no evidence</li> </ul>
Is the breadth, depth and currency of the program’s curriculum appropriate to the program’s goals/objectives?	Questionnaires to deans/department heads and survey to faculty	<p><u>Questionnaire scoring</u></p> <ul style="list-style-type: none"> <li>▪ 3 – clear and substantial evidence</li> <li>▪ 2 – some evidence</li> <li>▪ 1 – little or no evidence</li> </ul> <p><u>Faculty survey scoring</u> (assume 5 point scale):</p> <ul style="list-style-type: none"> <li>▪ 3 – average rating 4 and above</li> <li>▪ 2 – average rating between 2 and 3.9</li> <li>▪ 1 – average rating below 2</li> </ul> <p><u>Overall score</u></p>

		<ul style="list-style-type: none"> <li>▪ strong – sum of 5 or more points</li> <li>▪ adequate – sum between 2 and 5</li> <li>▪ weak – total of 2 or less</li> </ul>
How well does curriculum align with student's expectations?	Survey of current third and fourth year undergraduate students and graduate students	<ul style="list-style-type: none"> <li>▪ Assume 5 point scale</li> <li>▪ average ratings for possible learning outcomes</li> </ul> <p>Create overall average and score as:</p> <ul style="list-style-type: none"> <li>▪ exceeds expectations (&gt;3.5)</li> <li>▪ met expectations (2.5-3.5)</li> <li>▪ below expectations (&lt;2.5)</li> </ul>
How does delivery address the needs of non-traditional students (part-time, mature, Aboriginal, international and distance students)?	Questionnaire to deans/department heads Questionnaire to student advisors and others who provide support to specific groups of students	<ul style="list-style-type: none"> <li>▪ strong – clear and substantial evidence</li> <li>▪ adequate – some evidence</li> <li>▪ weak – little or no evidence</li> </ul>
How effectively are the needs of non-traditional students (part-time, mature, Aboriginal, international and distance students) addressed?	Survey of all current undergraduate and graduate students	Score student survey separately for each identifiable group <ul style="list-style-type: none"> <li>▪ strong – average rating &gt;4</li> <li>▪ adequate – average between 2 and 3.9</li> <li>▪ weak – &lt;2</li> </ul>
How responsive are academic support services (academic advising, tutoring, supplemental instruction, etc.) offered within faculty/department to student needs	Survey of all current undergraduate and graduate students	Separately for each identifiable group <ul style="list-style-type: none"> <li>▪ strong – average rating &gt;4</li> <li>▪ adequate – average between 2 and 3.9</li> <li>▪ weak – &lt;2</li> </ul>

### Program Demand

Evaluation topic	Data Collection	Scoring
How is the target population changing?	Demographic projections obtained from Statistics Canada	no scoring
How is the profile of demand changing	Enrollment data Duplicate counts are possible if more than one major	no scoring
What are recent enrollment trends?	Enrollment data Graduation data	<p>Separate scores for trends in Enrollment and Majors</p> <p>Score trend over five years:</p> <ul style="list-style-type: none"> <li>▪ Growing – enrollment growth at least 5%</li> <li>▪ Stable – enrollment change</li> </ul>

		+/- 5% ▪ Declining – decrease in enrollment at least 5%
What is national demand for discipline and how has this changed over time?	Postsecondary Student Information System (PSIS) data from Stats Can (need to define PSIS data to cover all relevant program areas)	Calculate change in enrollment over 5 years  Calculate average changes  Score average as: ▪ Growing – enrollment growth at least 5% ▪ Stable – enrollment change +/- 5% ▪ Declining – decrease in enrollment at least 5%

### Capacity to deliver

Evaluation topic	Data Collection	Scoring
How is the program structured?	Questionnaire to deans/department heads	no scoring
How are library services structured to provide services to each academic unit?	Information from the University Librarian and the most recent Unit review	no scoring
What proportion of faculty members are dedicated to specific programs?	Questionnaire to deans/department heads	▪ no scoring
What impact does the use of sessional instructors have on the quality of the unit's programs?	Questionnaire to deans/department heads	▪ no scoring
To what extent are members in the unit teaching more or less than the normal load for that unit?	Questionnaire to deans/department heads	▪ no scoring
What strategies are used to attract and retain faculty?	Questionnaire to deans/department heads	▪ no scoring
What is the teaching output of the faculty/department?	Office of Resource Planning	Total of 18 measures, 6 for each of lower division undergraduate, upper division undergraduate and graduate courses.  Score each measure as: ▪ 3 – top third ▪ 2 – middle third ▪ 1 – bottom third  Create the following 2 overall scores for each division 1. Overall output/non-

		<p>sessional instructor</p> <ul style="list-style-type: none"> <li>▪ Above average - &gt;2.5</li> <li>▪ Average – 1.5-2.5</li> <li>▪ Below average &lt;1.5</li> </ul> <p>2. Overall output/instruction cost</p> <ul style="list-style-type: none"> <li>▪ Above average - &gt;2.5</li> <li>▪ Average – 1.5-2.5</li> <li>▪ Below average &lt;1.5</li> </ul>
What is enrollment size of the academic unit as measured by graduation? How does this size of each program within the unit compare	Office of Resource Planning Duplicate counts are possible if more than one major	<p>Weight number for each credential by credit hours</p> <p>Score each convocation measure as:</p> <ul style="list-style-type: none"> <li>▪ Top – top third</li> <li>▪ Middle – middle third</li> <li>▪ Bottom – bottom third</li> </ul> <p>Score each program % as:</p> <ul style="list-style-type: none"> <li>▪ Top – top third</li> <li>▪ Middle – middle third</li> <li>▪ Bottom – bottom third</li> </ul>
Is there sufficient number of faculty and teaching staff to deliver the program?	Teaching load data supplied by Office of Resource Planning	<p>Score teaching load:</p> <ul style="list-style-type: none"> <li>▪ 3 – average actual teaching loads &gt;5% of load limit</li> <li>▪ 2 – average actual teaching loads +/- 5% of load limit</li> <li>▪ 1 – average actual teaching loads &lt;5% of load limit</li> </ul> <p>Score class size by year of study:</p> <ul style="list-style-type: none"> <li>▪ Top – top third</li> <li>▪ Middle – middle third</li> <li>▪ Bottom – bottom third</li> </ul>
Can the university retain the necessary people for academic program success?	Data on retention supplied by HR	<p>Score as:</p> <ul style="list-style-type: none"> <li>▪ Top – top third</li> <li>▪ Middle – middle third</li> <li>▪ Bottom – bottom third</li> </ul>
Can the university attract the necessary people for academic program success?	Questionnaire to deans/department heads	<p>Score as:</p> <ul style="list-style-type: none"> <li>▪ Top – top third</li> <li>▪ Middle – middle third</li> <li>▪ Bottom – bottom third</li> </ul>
To what extent is the delivery of instruction reliant on the use of sessional instructors?	Data on number of faculty and percentage full-time supplied by the Office of Resource Planning	<p>Score each proportion as:</p> <ul style="list-style-type: none"> <li>▪ 3 – high % (need to determine appropriate cut-offs)</li> <li>▪ 2 – moderate %</li> <li>▪ 1 – low %</li> </ul> <p>Overall score based on sum of scores:</p>

		<ul style="list-style-type: none"> <li>▪ High – average &gt;2.5</li> <li>▪ Moderate – average between 1.5 – 2.5</li> <li>▪ Low – average &lt;1.5</li> </ul>
Are there sufficient advising staff to provide effective support to students?	Questionnaire to deans/department heads	<p>Score as:</p> <ul style="list-style-type: none"> <li>▪ High – top third</li> <li>▪ Moderate – middle third</li> <li>▪ Low – bottom third</li> </ul>
What is the capacity of faculty to provide effective education?	<p>Questionnaire to deans/department heads on promotion of teaching quality</p> <p>On-line survey of current undergraduate students (rating up to 5 courses)</p> <p>On-line survey of current graduate students rating their program</p>	<p>Score deans questionnaires as:</p> <ul style="list-style-type: none"> <li>▪ High – clear and substantial evidence</li> <li>▪ Moderate – some evidence</li> <li>▪ Low – little or no evidence</li> </ul> <p>Separate average rating for undergraduates, graduate students scoring each as:</p> <ul style="list-style-type: none"> <li>▪ High – average &gt;3.5</li> <li>▪ Moderate – average between 2.5 and 3.5</li> <li>▪ Low – average &lt;2.5</li> </ul>
How well do the required courses delivered by other departments/faculties meet the needs of the program?	Questionnaire to deans/department heads	<p>Score as:</p> <ul style="list-style-type: none"> <li>▪ Excellent – all required courses meet needs well</li> <li>▪ Adequate – all required courses meet needs at least adequately</li> <li>▪ Insufficient – at least one required course does not meet needs at all</li> </ul>
Does the library/archives provide sufficient information resources to meet the program's needs?	<p>Questionnaire to deans/department heads and most recent unit review</p> <p>Questionnaire to subject liaison librarian</p> <p>Survey of faculty</p> <p>On-line survey of current students</p>	<p>Score deans and librarian questionnaire as:</p> <ul style="list-style-type: none"> <li>▪ 3 – clear and substantial evidence</li> <li>▪ 2 – some evidence</li> <li>▪ 1 – little or no evidence</li> </ul> <p>*Score faculty, undergraduate and graduate student surveys separately</p> <p>For each group, average ratings across all aspects and score as:</p> <ul style="list-style-type: none"> <li>▪ 3 – average of &gt;4.2</li> <li>▪ 2 – average between 3.4 and 4.2</li> <li>▪ 1 – average &lt;3.4</li> </ul> <p>Overall score</p> <ul style="list-style-type: none"> <li>▪ High – total &gt;13</li> <li>▪ Moderate – total between 8</li> </ul>

		and 13 ▪ Low – total <8
How adequate are the equipment, classrooms, laboratories and specialized facilities for delivery of the faculty/department's educational programs?	Survey of faculty On-line survey of current students	Score deans questionnaire as: ▪ 3 – clear and substantial evidence ▪ 2 – some evidence ▪ 1 – little or no evidence  *Score faculty, undergraduate and graduate student surveys separately  For each group, average ratings across all aspects and score as: ▪ 3 – average of >4.2 ▪ 2 – average between 3.4 and 4.2 ▪ 1 – average <3.4  Overall score ▪ High – total >13 ▪ Moderate – total between 8 and 13 ▪ Low – total <8
Given current resources (faculty, space, funding), does the program have excess capacity or constraints on meeting needs?	Questionnaire to deans/department heads	Score as: ▪ Excess capacity ▪ Meets needs but no excess ▪ Significant constraints
Are there constraints on attracting good quality graduate students?	Questionnaire to deans/department heads	Score as: ▪ High – substantial constraints ▪ Moderate – moderate constraints ▪ Low – little or no constraints

### Financial Impact

Evaluation topic	Data Collection	Scoring
What portion of the library expenditures is for acquisitions and overhead for each faculty/department?	Information from the University Librarian Will need to use attribution rules to breakdown some costs by academic unit	no scoring
What is the tuition revenue attributable to the faculty/department based on enrollments?	Revenue data supplied by Office of Resource Planning	no scoring
What is the operating grant revenue attributable to the	Revenue data supplied by Office of Resource Planning	▪ no scoring

faculty/department based on enrollments?		
What is the revenue from Tri-council grants for indirect costs (overhead) attributable to the faculty/department?	Revenue data supplied by Office of Resource Planning	▪ no scoring
Other revenue: what other revenue can be attributed to the faculty/department?	Revenue data supplied by Office of Research Services and Deans/Department Heads	▪ no scoring
What are instruction costs?	Cost data supplied by Financial Services with support from Office of Resource Planning	▪ no scoring
What are the other direct and indirect costs of delivering the faculty/department's academic programming?	Cost data supplied by Financial Services with support from Office of Resource Planning	▪ no scoring
Fundraising: what proportion of development or advancement revenue does the institution receive because of the faculty/department?	Fundraising data supplied by Office of Development and Alumni Relations	<ul style="list-style-type: none"> <li>▪ Weight proportion by size of graduating body associated with department</li> </ul> Score weighted proportion as: <ul style="list-style-type: none"> <li>▪ Top – top third</li> <li>▪ Middle – middle third</li> <li>▪ Bottom – bottom third</li> </ul>
What financial impact does the faculty/department have on the finances of the University	See current revenues and costs	Score net surplus or deficit as: <ul style="list-style-type: none"> <li>▪ Positive – at least 2% of dept budget &gt;0</li> <li>▪ Neutral – if within +/- 2% of dept budget of 0</li> <li>▪ Negative – if at least 2% of dept budget &lt;0</li> </ul>
Are there efficiencies in the way the faculty/department has been operated?	Questionnaire to deans/department heads	Score as: <ul style="list-style-type: none"> <li>▪ Considerable – clear and substantial evidence of savings at least 2% of budget</li> <li>▪ Moderate – some evidence</li> <li>▪ None – little or no evidence</li> </ul>

### Learning and research outcomes

Evaluation topic	Data Collection	Scoring
What are the characteristics of leavers?	Data supplied by Office of Resource Planning	no scoring
How do the research activities of the unit benefit its academic programming?	Questionnaire to deans/department heads	no scoring
How do the programs contribute to the employability of its graduates?	Questionnaire to deans/department heads	▪ no scoring
What are the retention and	Data supplied by Office of	Score as:

completion rates?	Resource Planning	<ul style="list-style-type: none"> <li>▪ Top – top third</li> <li>▪ Middle – middle third</li> <li>▪ Bottom – bottom third</li> </ul>
What is the demonstrable effectiveness in preparing students for the future?	Survey of recent alumni	<p>Score each aspect as:</p> <ul style="list-style-type: none"> <li>▪ 3 – top third</li> <li>▪ 2 – middle third</li> <li>▪ 1 – bottom third</li> </ul> <p>Overall score as:</p> <ul style="list-style-type: none"> <li>▪ Top</li> <li>▪ Middle</li> <li>▪ Bottom</li> </ul>
How does the level of scholarly and creative contributions that faculty make to the discipline compare to those of faculty in comparable faculty/department at peer institutions?	<p>H index supplied by HESA, for Regina and peer institutions</p> <p>Granting council data for Regina and peer institutions supplied by HESA</p> <p>Publication data supplied by HESA for Regina and peer institutions</p> <p>Number of performances of productions, exhibitions over the last 3 years from relevant department heads and from peer institutions</p>	<p>Score each of the following – H index, ratio of granting council income, percentage of faculty receiving grants, number of performance, production and exhibitions</p> <p>Rank Regina with other 5 peers</p> <p>Score as:</p> <ul style="list-style-type: none"> <li>▪ Top – ranked 1 or 2</li> <li>▪ Similar – ranked 3 or 4</li> <li>▪ Below – ranked as 5 or 6</li> </ul>

### Wider benefits

Evaluation topic	Data Collection	Scoring
What benefits does the program bring to the university?	Questionnaire to deans/department heads	<ul style="list-style-type: none"> <li>▪ Top – clear and substantial evidence</li> <li>▪ Middle – some evidence</li> <li>▪ Bottom – little or no evidence</li> </ul>
What public service contributions does the faculty/department make to the community?	Questionnaire to deans/department heads	<ul style="list-style-type: none"> <li>▪ Top – clear and substantial evidence</li> <li>▪ Middle – some evidence</li> <li>▪ Bottom – little or no evidence</li> </ul>
What beneficial recognition does the faculty/department bring to the university?	Questionnaire to deans/department heads	<ul style="list-style-type: none"> <li>▪ Top – clear and substantial evidence</li> <li>▪ Middle – some evidence</li> <li>▪ Bottom – little or no evidence</li> </ul>
Has the faculty/department cultivated relationships that are beneficial to the institution?	Questionnaire to deans/department heads	<ul style="list-style-type: none"> <li>▪ Top – at least two enduring relationships with clear benefits (financial, prestige, provide enhancing learning or research opportunities)</li> <li>▪ Middle – at least one</li> </ul>



		<p>enduring relationships with clear benefits</p> <ul style="list-style-type: none"> <li>▪ Bottom – little or no evidence</li> </ul>
<p>To what extent does the faculty/department's academic programming and research help the university differentiate itself from other institutions?</p>	<p>Questionnaire to deans/department heads</p> <p>Survey of faculty</p>	<p>Score deans/department heads questionnaire as:</p> <ul style="list-style-type: none"> <li>▪ 3 – clear and substantial evidence</li> <li>▪ 2 – some evidence</li> <li>▪ 1 – little or no evidence</li> </ul> <p>Score faculty as:</p> <ul style="list-style-type: none"> <li>▪ 3 – top third</li> <li>▪ 2 – middle third</li> <li>▪ 1 – bottom third</li> </ul> <p>Overall score as:</p> <ul style="list-style-type: none"> <li>▪ High – average &gt;2.5</li> <li>▪ Moderate – average between 1.5 and 2.5</li> <li>▪ Low – average &lt;1.5</li> </ul>

### Future opportunities

Evaluation topic	Data Collection	Scoring
<p>Are there opportunities for efficiencies or cost-containment measures through restructuring, technological innovations or re-designing of curriculum delivery?</p>	<p>Questionnaire to deans/department heads</p>	<p>Score as:</p> <ul style="list-style-type: none"> <li>▪ Top: specific proposal with clear benefits</li> <li>▪ Middle: proposals with some merit but either not sufficiently detailed or benefits not clear</li> <li>▪ Bottom: poor proposals</li> </ul>
<p>What opportunities or innovations could be implemented to strengthen the faculty/department?</p>	<p>Questionnaire to deans/department heads</p>	<p>Score as:</p> <ul style="list-style-type: none"> <li>▪ Top: specific proposal with clear benefits</li> <li>▪ Middle: proposals with some merit but either not sufficiently detailed or benefits not clear</li> <li>Bottom: poor proposals</li> </ul>

# **Wilfred Laurier University**

[http://www.wlu.ca/homepage.php?grp\\_id=13117](http://www.wlu.ca/homepage.php?grp_id=13117)

## **Process involves two main components**

1. Resource management
2. Academic and administrative prioritization

## **Planning Task Force (PTF)**

- Responsible for the delivery of the Integrated Planning and Resource Management (IPRM) initiative
- It will also oversee the work of the following teams:
  - Resource Management Team
  - Academic Priorities Team
  - Administrative Priorities Team
- All members of the PTF will be drawn from a pool of nominated individuals
- Election process will occur after nominations closed. Parallel elections will occur for both faculty/librarian and non-faculty/academic administrators positions
- Appointments to the PTF will take place after the election process finished
- Appointments will be made jointly by the VP Finance and VP Academic & Provost following consultation with the senior advisory team
- Two co-chairs will be appointed by the VP Finance and VP Academic & Provost following consultation with the senior advisory team
- Academic members of faculty who do not occupy formal positions within the university will be well represented
- The President and Vice-Presidents will not be members of the PTF. They will set the mandate by which the PTF will execute its responsibilities.
- The mandate is subject to Senate endorsement and Board approval
- The PTF will have cross-representation from members of the multi-campus governance working groups

## **Membership (48 total)**

- 28 members will be faculty/librarians
  - 19 of whom will be elected
  - 9 of whom will be appointed
- 18 members will be non-faculty/academic administrators (deans, AVP Teaching and Learning and University Librarian), AVPs, directors, managers and staff. (Note: academic administrators may also be appointed to the Academic Priorities Team)
  - 12 of whom will be elected
  - 6 of whom will be appointed
- 1 undergraduate student appointed by the Wilfred Laurier University Students' Union

- 1 graduate student appointed by the Graduate Student Association

### **Academic Priorities Team (25 members total)**

- 23 members will be faculty/librarians
  - 15 of whom will be elected
  - 8 of whom will be appointed
- 2 graduate students appointed by the Graduate Student Association

### **Administrative Priorities Team (20 members total)**

- 5 members will be faculty/librarians
  - 3 will be elected
  - 2 will be appointed
- 13 members will be non-faculty/academic administrators (deans, AVP Teaching and Learning and University Librarian), AVPs, directors, managers and staff. (Note: academic administrators may also be appointed to the Academic Priorities Team)
  - 9 will be elected
  - 4 will be appointed
- 2 undergraduate students appointed by the Wilfred Laurier University Students' Union

### **Resource Management Team (20 members total)**

- 12 members will be faculty/librarians
  - 6 will be elected
  - 6 will be appointed from the list of all nominees
- 6 elected members will be non-faculty/academic administrators (deans, AVP Teaching and Learning and University Librarian), AVPs, directors, managers and staff. (Note: academic administrators may also be appointed to the Academic Priorities Team)
- 1 undergraduate student appointed by the Wilfred Laurier University Students' Union
- 1 graduate student appointed by the Graduate Student Association

## Process

(from [http://www.wlu.ca/page.php?grp\\_id=13117&p=21793&pv=1](http://www.wlu.ca/page.php?grp_id=13117&p=21793&pv=1))

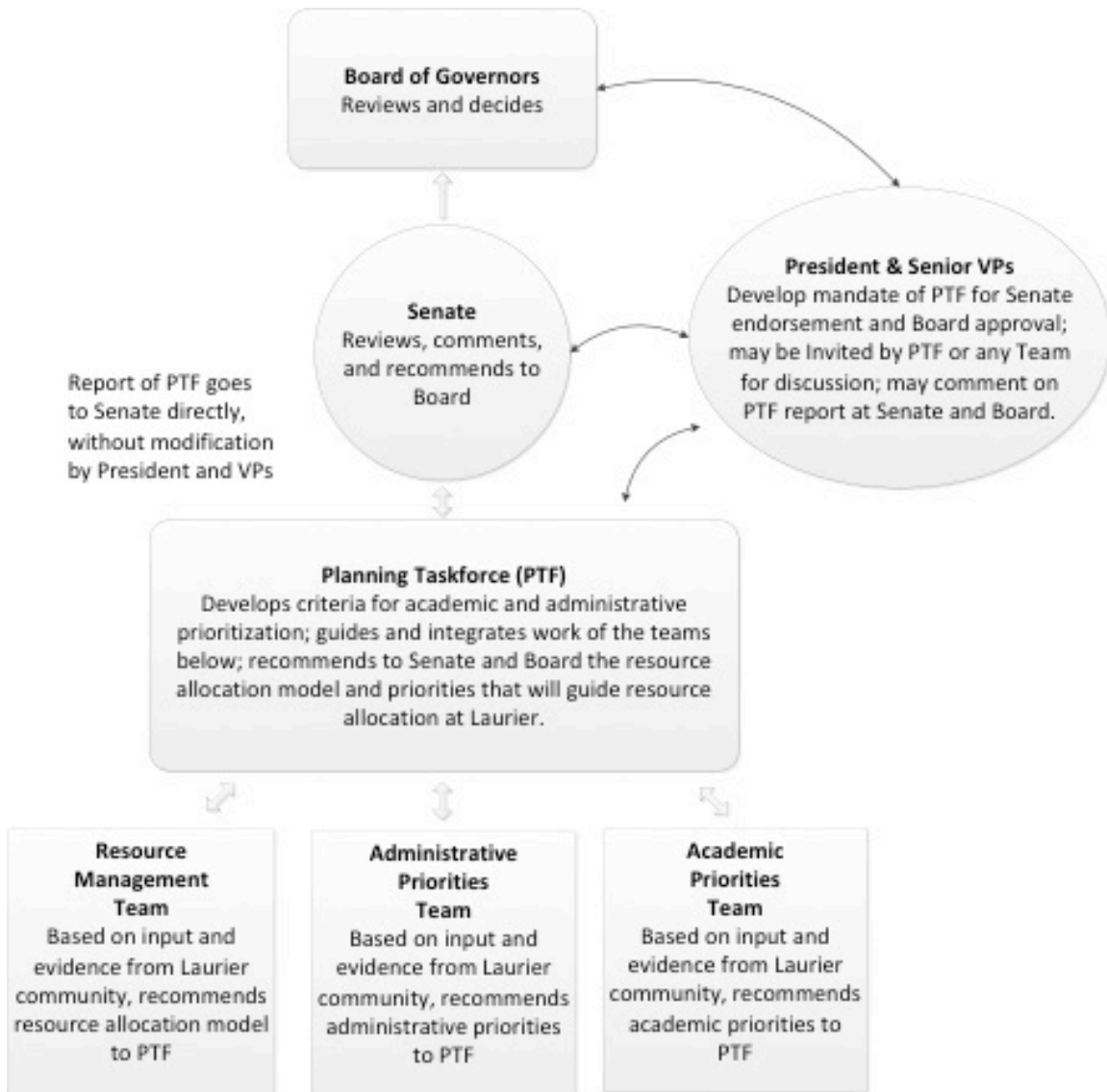


Diagram and process below from:

[http://www.wlu.ca/page.php?grp\\_id=13117&p=21793&pv=1](http://www.wlu.ca/page.php?grp_id=13117&p=21793&pv=1)

1. A nominations process determined the pool of individuals from which the Planning Task Force (PTF) and its working groups were constructed.
2. The mandate of the PTF was developed by the president and vice presidents, reviewed and endorsed by Senate and reviewed and approved by the Board of Governors.
3. The PTF set the mandates and approved decision protocols for the Resource Management Team (RMT), the Academic Priorities Team (AcPT) and the Administrative Priorities Team (AdminPT).

4. The AcPT and AdminPT developed criteria and weights for program evaluation, which were recommended to the PTF. The PTF approved the criteria and weights by which Academic and Administrative programs will be evaluated and also the principles that will underpin the new Resource Allocation Model.
5. The RMT will seek input from the university community about which Resource Allocation Model best suits Laurier's needs.
6. Two templates will be created – one academic and one administrative – to collect qualitative and quantitative information from all programs at the university. Templates will enable the AcPT and AdminPT to evaluate each program.
7. Each academic and administrative program (encompassing all areas of the university) will complete a template, with input from the employees in each area. The templates will provide all areas with the opportunity to present future ambitions for their programs in addition to past achievements and current performance.
8. The AcPT and the AdminPT will evaluate each template submitted against the criteria and make prioritization recommendations in a report to the PTF.
9. The RMT will submit a recommendation to the PTF on the most suitable Resource Allocation Model for Laurier based on input from the Laurier community.
10. The PTF will evaluate recommendations that come from the AcPT, AdminPT and the RMT. The target date for these recommendations to be made to the PTF is Spring 2014.
11. The PTF will produce a single reporting document, which integrates the contributions of the three support teams.
12. The final document produced by the PTF will be transmitted directly to the Senate and Board without modification by the president and vice presidents. The president and vice presidents will have the opportunity to comment on the PTF report when it is considered by Senate and the Board, and they may make formal representation to the Senate and/or Board with views that are independent of those contained in the PTF report.
13. The Board of Governors and Senate will review the recommendations of the PTF.
14. Once approved, an implementation process will be developed to put into place the recommendations that come out of the IPRM process.

## **University of Guelph**

[http://media.zuza.com/2/5/25b4df43-8622-49a0-9a01-fcedf0d09731/Program\\_Prioritization\\_Process\\_Task\\_Force\\_Report1.pdf](http://media.zuza.com/2/5/25b4df43-8622-49a0-9a01-fcedf0d09731/Program_Prioritization_Process_Task_Force_Report1.pdf)

### **Task Force**

- 7 current chairs of Senate Standing Committees
- 2 past chairs of Senate Standing Committees
- 5 staff members – nominated by the University community
- 5 faculty members – nominated by the University community
- 2 students – application for internship positions

### **Evaluation Criteria**

10 criteria were used to evaluate instructional and non-instructional programs. They included:

1. History and development – 5 points
2. External demand – 10 points
3. Internal demand – 10 points
4. Quality inputs – 10 points
5. Quality outcomes – 15 points
6. Size, scope and productivity – 12 points
7. Revenue – 8 points
8. Costs – 10 points
9. Impact, justification and essentiality – 15 points
10. Opportunity analysis – 5 points

### **Ranking/Scoring**

The 21-member team was divided into four groups. The 492 programs were randomly distributed to each of the four groups. Each group had to review approximately 15 programs per week for a period of 13 weeks.

Each member of the four groups scored each assigned program individually. Scores were then recorded and compiled in one database.

When the full team met each week they converted final scores to one of three ratings:

- Below expectations
- Meets expectations
- Exceeds expectations

Programs were then divided into 5 quintiles based on their final ranking.