A Template to Identify, Define, Fund, and Evaluate University Priorities

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Abstract:

UW-Stout utilizes a systematic planning process to identify issues, develop priorities for the campus to address these issues, evaluate the success of the priorities, and include the campus in the process.

A cornerstone of this planning process is the annual development of campus priorities, using the mission, vision, values and goals as its base. These priorities are short-term initiatives, usually two years in length, which allow the university to accomplish its longer term goals.

Since 1996, using this process, the university has identified over 50 priorities and reallocated funds or identified new funding sources to support the priorities. Further, the process addresses a problem common to higher education business practices in that it provides a method for integrating planning, budgeting and evaluation in a systematic, easily understood manner. It also provides a mechanism to ensure that campus priorities are doable and focused on areas of importance to the campus.

A best practice component of the annual priorities process is the use of a template to identify, describe, fund and evaluate the priority. The template ensures that each priority is guided by these key questions:

- What issue is being solved?
- What solution is being proposed?
- How is the linkage to the strategic plan demonstrated?
- What has to be done for this priority to succeed?
- Who are the positions or implementation team that will be responsible for each step?
- What is the timeline?
- What resources are needed for this priority to succeed *(human, physical, fiscal, other)*?
- What information will be collected to assess successful deployment of the action plan?

This template could easily be integrated into the planning process at other institutions. It is not a single solution, but rather can be used year after year with each planning cycle.

Introduction of the organization:

The University of Wisconsin-Stout (*UW-Stout*) is one of the 13 publicly supported universities in the University of Wisconsin System (*11 comprehensive institutions plus UW-Madison and UW-Milwaukee*). The UW System designates UW-Stout as a special mission institution, forged from the heritage of its founder, Senator James Huff Stout, a Wisconsin industrialist. Stout believed that people needed advanced education to prepare them for America's developing industrial society. To implement this vision, Mr. Stout founded a private institution called the Stout Manual Training School in 1891. In 1911, the training school became a public institution named Stout Institute and received teacher-training accreditation in 1928 with programs centered on industrial arts and home economics. In 1932, Stout was accredited as a college and received Master's degree accreditation in 1948. In 1971, UW-Stout became part of the UW System when a State of Wisconsin law combined its two public university systems under one Board of Regents.

Now, 116 years since it was founded, UW-Stout's 8,416 students are enrolled in undergraduate and graduate programs in the College of Human Development; the College of Technology, Engineering and Management; the College of Arts and Sciences; or the School of Education. UW-Stout offers a distinctive array of 30 undergraduate and 18 graduate degree programs which, taken as a whole, are unique in the country. UW-Stout offers the smallest number of undergraduate programs within the UW System. Approximately half of these programs are offered at no other campus in the UW System, and several are unique in the nation. Even degree programs appearing to be similar to programs elsewhere are unique in the extent of applied focus.

Statement (Restatement) of the Problem/Initiative

This best practice addresses several challenges in higher education. First, it provides a method to link together planning, budgeting and evaluation in a systematic way. At many institutions, the planning, budgeting and evaluation responsibilities are spread out across several departments, making it difficult for these functions to work in an integrated way. The University Priority template provides a simple mechanism to bring together information from these areas into one central location, even if these units are organizationally separated. And, it ensures that each priority is appropriately resourced and evaluated. Second, it provides a mechanism to ensure that University Priorities are doable, and focused on areas of importance to the campus.

Design

The University Priority template was developed using an iterative process that included: 1) regular review by the Strategic Planning Group; 2) revisions based on information gleaned from conferences, workshops, discussions with other campuses, and articles, including the Malcolm Baldrige National Quality Award criteria; and 3) revisions based on use of the template over an eight year time period. Completed university priority templates are reviewed by the Strategic Planning Group and the campus annually. The template itself is also reviewed annually by a small team in preparation for usage by the campus in the upcoming year. There were no financial resources needed to implement and revise the template. The University Priority template is attached. Examples of completed University Priority templates can be found on the website:

http://www.uwstout.edu/bpa/univprio/2006/index.htm

Implementation

The University Priority template is utilized annually during the planning process. The template is used in each of the following steps:

Task	Timeline	Stage of the process
The leadership group develops a first draft of the priority	Summer	Planning
Draft priorities are shared with the campus for review and feedback. The priorities are revised based on campus feedback	Fall	Planning
The leadership group finalizes the resource allocations ("implications for resources" box) and shares the priorities with the campus	Winter	Budgeting
The leadership group reviews initial progress on the action plan ("action plan" box)	Early Spring	Evaluation
The leadership group reviews data ("key measures of performance" box) and year-end progress on the action plan to assess the priorities success.	Late Spring	Evaluation

Additional information about the planning process can be found on the UW-Stout

website, including the planning model:

http://www.uwstout.edu/bpa/planning/stratplanmod.pdf , the planning system:

http://www.uwstout.edu/bpa/planning/stratplansys.pdf , and the Strategic Planning

Group: http://www.uwstout.edu/bpa/planning/stratplangroup.pdf .

Benefits

UW-Stout's planning process was identified as an outstanding strength by its

accreditation review team, as well as during the Malcolm Baldrige National Quality

Award review process. Since 1996, using this planning process and template, the

university has identified over 50 priorities and reallocated funds or identified new

funding sources to support the priorities. Annually, between $500,000 and $1,500,000 is

allocated to fund these priorities. These priorities have led to widespread initiatives and

improvements in teaching and learning, academic programs, student support services,

administrative and information technology areas. For example,

- An e-Scholar program that provides laptop computers to all undergraduate

  students at the university was initiated as result of this process.

- UW-Stout is in the process of implementing eight new collaborative academic programs, including bioinformatics, nanotechnology, and cognitive neuroscience, which were funded through a university priority to implement a curricular incubation center.

- A first-year experience program was initiated as a result of the priority process which includes a first year advising program, first year student learning communities, a common book reading program, and a block-scheduling program.

Positive outcomes as a result of these, and other, initiatives are evident. For example, student satisfaction with advising has increased. Drops and failures in remedial math courses have dropped by 61%. UW-Stout continues to lead the University of Wisconsin System Comprehensives in the number of transfers from technical colleges. Further, over the past five years, UW-Stout has nearly doubled the number of distance education courses offered and leads the UW System Comprehensives on the number of distance education courses. And, student placement rates continue to exceed 95%.

Retrospect

The University Priority template is iterative and continues to be revised as new information and needs surface.

1. University Priority

"What solution are you proposing?"

[insert a 1-3 sentence description of the solution being proposed]

Linkage to Strategic Plans
[insert university goals and values that this priority supports]

2. Statement of the Issue:

"What issue are you trying to solve?"

[Insert a 1-5 sentence description of the issue you are trying to solve. Reference available data which indicates that this is an issue]

3. Action Plan:	Responsible:	Timeline:
"What has to be done for this priority to succeed?" [Insert 3 – 5 high level steps needed to accomplish the priority statement above.]	*"Who are the positions or people that will be responsible for each step?"*	*MUST be specific target completion date.*

4. Implication for Resources:

"What is needed for this priority to succeed?"
(Human, fiscal, physical, other)

[insert information about the resources needed to implement the priority]

5. Key Measures of Performance:

It is the expectation that priority owners will be using/maintaining the process measures to assess action plan deployment. At the end of the fiscal year, the Strategic Planning Group will review and discuss the implementation progress and impact.

Process Measures:
Identify no more than two process measures when answering the question:

"What information will be collected to assess successful deployment of the action plan?"

[insert process measures]

Performance Indicators:
BPA is responsible for benchmarking overall performance to answer the question:

"What information will be collected to benchmark and measure the priority's success?"

[insert outcome measures. At UW-Stout, we choose from a list of 17 common performance indicators.]