Overview of Topics

• Unit presentation templates
• Committee deliverables to university leadership
• Evaluation tool
• Written report by committee
Unit Presentation Components

- Unit decks will have the following:
  - General information to “Tell Your Story”
    - Mission
    - How unit aligns to university goals
  - Organizational chart and position/staffing information
  - Opportunities and strengths
  - Key Performance Indicators (KPIs), benchmarks, and surveys
  - Five-year financial pro-forma
  - Reserve utilization

- 45 minutes max
Deliverables

Deliverable from Unit to Committee
• Packet submission checklist by units
• Unit deck presented to committee

Deliverable from Committee to University Leadership
• Unit deck presented to committee
• Summary report by committee members [5 sections]
  • Goals & Initiatives
  • Organization
  • Operations
  • Finance
  • Assessment
Evaluation Tool Feedback

- Team assigned prior to presentation for 5 written report sections
  - Goals & Initiatives
  - Organization
  - Operations
  - Finance
  - Assessment

- Comment box for each scoring line is a good add to elaborate each line score

- Row 18 pertains to Reserve Funds

- Benchmarks & surveys are the preferred feedback methods
  - Not all units will have KPIs

- Process improvements by units
  - Units to detail their plan

- Consistent evaluation tool is a good addition

- Evaluation is to assess their effectiveness & efficiency to support mission
## Evaluation Tool

<table>
<thead>
<tr>
<th>Blue Cells</th>
<th>Completed by Committee Member</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cell B2</td>
<td>Submitting Unit Presenter</td>
</tr>
<tr>
<td>Cell B3</td>
<td>Unit Title</td>
</tr>
<tr>
<td>Cell B4</td>
<td>Committee Member Name</td>
</tr>
<tr>
<td>Cell B5</td>
<td>Committee Member Evaluation Score [Scale 1-5]—Calculates Automatically</td>
</tr>
<tr>
<td>Cell B6</td>
<td>Committee Member Evaluation Score [Scale 0%-100%]—Calculates Automatically</td>
</tr>
<tr>
<td>Cell</td>
<td>Description</td>
</tr>
<tr>
<td>--------</td>
<td>-----------------------------------------------------------------------------</td>
</tr>
<tr>
<td>B10</td>
<td>Evaluate Unit on Understanding How they Support their Customers in Achieving Goals, Destinations, and Strategic Initiatives</td>
</tr>
<tr>
<td>B12</td>
<td>Evaluate Unit on How they Manage their Cost</td>
</tr>
<tr>
<td>B14</td>
<td>Evaluate Unit on How they Are Addressing their Opportunities/Challenges</td>
</tr>
<tr>
<td>B16</td>
<td>Evaluate Unit Based on their Scores with Benchmarks and/or Surveys</td>
</tr>
<tr>
<td>B18</td>
<td>Evaluate Unit Regarding Efficient Utilization of Reserves</td>
</tr>
<tr>
<td>Cell B20</td>
<td>Evaluate Unit on KPIs if Provided; If not, then score the same as cell A16 Score, Comment Box Should State “Not Applicable”</td>
</tr>
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<td>-------------------</td>
<td>-------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Cell B22</td>
<td>Evaluate Unit on Establishing a Mindset of Continuous Improvement. Did they Outline Steps they are Taking to Close Gaps?</td>
</tr>
<tr>
<td>Cell B24</td>
<td>Provide Comments Pertaining to the Unit’s Strengths in Outlining their Mission</td>
</tr>
<tr>
<td>Cell B26</td>
<td>Provide Comments Pertaining to the Unit’s Weakness in Outlining their Mission</td>
</tr>
</tbody>
</table>
Written Summary Report to Senior Leaders

• 5 Sections
  • Goals & Initiatives
  • Organization
  • Operations
  • Finance
  • Assessment

• Assign Committee Members Prior to Presentations - OPTIONS
  • Same members write the same section for each presentation (FY21 format)
  • Change assignments for each presentation

Office of Business Affairs