

# Strategic Resource Allocation Update

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- Provost Jonathan Anderson
- Vice President Mary Voves
- Academic Task Force Chair, Tony Masiello
- University Services Task Force Chair, Scott Buck

*BOT Presentation: October 13, 2023*

# What is Strategic Resource Allocation (SRA)?

- SRA is a process by which we are examining the ways our resources are being invested
- SRA will help shape and transform the institution
- SRA addresses all institutional costs
  - All university services and academic programs will be reviewed equally and transparently
- SRA will provide a plan to rebuild EWU's financial health and sustainability

# Communications

## June 2023

- June 1: Town Hall #7 - Virtual
- June 6: Follow-up email to academic programs template reviewers re appendices and amendments
- June 6: Follow-up email to university services regarding data set delay
- June 14: Phase IV Update to Campus from Co-Champions
- June 20-27: Completed templates returned from Academic Programs to task force for review
- June 28: Executive Leadership Update Newsletter out with SRA update

## July 2023

- July 25: Update website re Scott Buck as new University Services Chair
- July 26: Executive Leadership Update Newsletter out with SRA update

## August 2023

- Aug. 10: Completed templates returned from University Services to task force for review
- Aug. 21: First Day of Semester Term
- Aug. 30: Executive Leadership Newsletter out with SRA update

# Communications

## September 2023

- Sept. 13: Email sent to template reviewers for semester programs inviting them to submit templates by Oct. 6
- Sept. 13: Updated timeline to reflect four new training sessions specific to semester programs
- Sept. 19: SRA final report update and recognition of task force members included in President's Convocation
- Sept. 22: Email to academic template reviewers re Opportunity to provide addendum on Academic Programs Templates based upon updated dataset
- Sept. 22: New page added for providing feedback to updated datasets/Latest Update
- Sept. 27: Executive Leadership Newsletter out with SRA update

## October 2023

- Oct. 6: Templates Due for Semester Academic Programs (email to reviewers)
- Oct. 6: Webpage closes for responses to updated academic programs' datasets
- Oct. 12: BOT Meeting with SRA update - notification for campus provided in pre-BOT meeting highlight email
- Oct. 19: Inside EWU announcement re upcoming Town Hall
- Oct. 25: Executive Leadership Newsletter out with SRA update
- Oct. 26: SRA Town Hall #8
- TBD: Campus Message outlining process, feedback actions, timeline/milestones, and expectations

# Communications

## November 2023

- Nov. 21: Inside EWU announcement re: upcoming Town Hall
- Nov. 28: SRA Town Hall #9
- Nov. 29: Executive Leadership Newsletter out with SRA update
- TBD: Campus Message outlining process, feedback actions, timeline/milestones, and expectations

## December 2023

- *Dec. 6: Final Report posted (tentative)*
- Dec. 7: BOT Meeting
- Dec. 27: Executive Leadership Newsletter out with SRA update
- TBD: Feedback portal opens

# Task Force Engagement

- Academic Task Force and Facilitation Team have hosted 12 virtual drop-in sessions to provide assistance and answer questions.
- University Services Task Force distributed a template completion training video and materials.
- At least 35 academic program and university service review sessions since June.
- Recurring and on-demand meetings between the Facilitation Team and both Task Forces.
- Academic Task Force has reviewed approx. 274 templates and the Services Task Force has reviewed approx. 189 templates.

# Evaluation Criteria & Weighting

## University Services Task Force

[222 templates to review]

- Impact, Justification, and overall Essentiality - 25%
- Internal Demand - 20%
- External Mandates and External Demand - 20%
- Quality - 15%
- Cost Effectiveness - 15%
- Opportunity Analysis - 5%

## Academic Task Force

[456 templates to review]

- History, Development & Expectations - 5%
- External Demand - 10%
- Internal Demand - 10%
- Quality Inputs & Processes - 5%
- Quality Outcomes - 10%
- Size, Scope & Productivity - 15%
- Revenues & Resources Generated - 10%
- Expenses & Costs Incurred - 10%
- Impact, Justification & Overall Essentiality - 15%
- Opportunity Analysis - 10%

# Review of Quintiles

- **Invest:** eligible for enhanced resources
- **Maintain:** continue with current resources
- **Streamline:** continue with reduced resources
- **Transform:** to improve effectiveness
- **Disinvest:** candidate for phase-out; subject to additional review



# Timeline and Data Changes

- Creation of resources/materials required multiple reviews and revisions as well as thoughtful incorporation of feedback from template testers
- Data Set Production
  - Prior to template launch
    - Data sets developed
    - Pilot programs and feedback
    - Changes to data sets
  - After template launch
    - Additional changes to data sets for academic units
    - Posted [changes to data](#)
    - Providing opportunity for academic programs to review/respond to the changes in the data sets

# Report Creation and Review

- Both reports released to campus December 6, 2023
  - SRA co-champions preview
    - Non-factual remarks & Inflammatory comments
  - Co-champions can not unilaterally change reports
- Task Force Chairs present reports to BOT on December 7, 2023
- Campus will be given opportunity to provide feedback
  - Consultant Larry Goldstein suggested
    - 2 week feedback period
    - 250 words for staff/faculty
    - 500 words for Chair/Director level
    - 1500 words for Dean/AVP/VP level
  - ...but conversations about most appropriate feedback timeline and process will continue
- Reports and feedback are considered for implementation plans

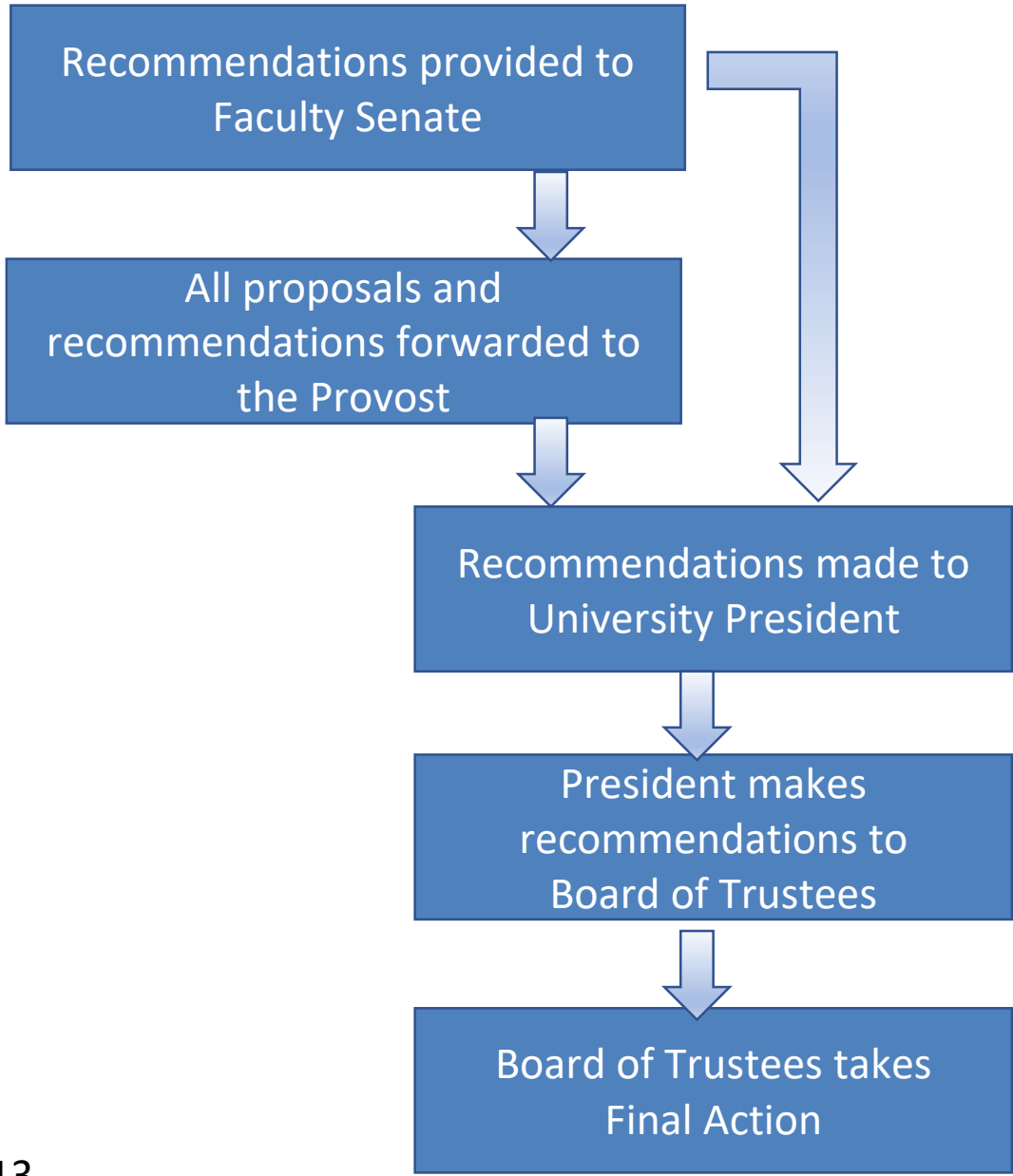
# Academic Program Plan

- The recommendations for investment line up with budget planning and personnel requests
- The recommendations for reduction or disinvestment follow academic policy

# Academic Program Plan



**the process for programs continued:**



# University Services

- The recommendations of the University Services Task Force will be evaluated by the University Budget Committee, and the committee will forward their recommendations to the President and Executive Leadership Team.

**Questions?**

**Thank you and go EAGS!**

