**Cascaded Strategic Planning Guidelines (V 2.0)**

University of Idaho Strategic Plan and Process 2016-2025

Waypoint One: 2016-2019 (Fiscal years 2017, 2018, 2019)

**Introduction.** As a result of the comprehensive discussion about the future, the University of Idaho community developed a long-range strategic plan for 2016-2025. The strategic plan is framed around our long-standing mission, grounded in our land grant status:

*The University of Idaho will shape the future through innovative thinking, community engagement and transformative education.*

The plan has four major goals that support the university vision articulated by President Chuck Staben. The complete plan may be viewed and downloaded from the Provost’s website.

**Grassroots implementation.** The University of Idaho strategic plan reflects our aspirations in four major areas that are vital to our mission. The first three goals (Innovate, Engage, Transform) relate directly to our longstanding commitments to scholarly pursuits, community engagement and extension, and student success. The fourth goal (Cultivate) is focused on the people and relationships vital to fulfilling our mission. Now that this broad groundwork has been set, the next step is to develop detailed action plans to guide the next nine years.

Implementing our strategic plan will require institutional-wide activities consistent with the mission, vision, and goals outlined in the plan. The university strategic plan seeks to engage all university colleges and the various support units (both within and beyond the colleges) through a cascading of the overall framework down to unit-specific strategic plans. For the sake of clarity, we will refer to these distributed and unique plans as Cascaded Plans, although within your college / unit you may choose to call these plans something else (e.g. College Strategic Plan, Operational Plans, Roadmaps etc.). As described in the university strategic plan implementation section, the Institutional Planning and Effectiveness committee will review all of the proposed Cascaded Plans to ensure our efforts are coordinated and action plans are comprehensive.

**Creativity vs organization.** There is a natural tension that exists in this process. We want units to be creative and to pursue tactics that are natural complements to their current and planned direction. Yet, in the end, we must be able to succeed across all dimensions of the plan over the next nine years. Thus, there must be two-way communication between the diverse units on campus and a central hub that provides some coordination of activities so that we are working effectively together. As suggested in the strategic plan, President Staben established the Institutional Planning and Effectiveness (IPE) committee to serve in this coordinating role.

Academic Units: Colleges will be asked to show the connection between their Cascaded Plan and the key objectives of the university strategic plan by tying the outcomes of their initiatives to selected key institutional metric(s) (refer to those metrics listed on page 6 of the university strategic plan). Colleges are encouraged to focus their efforts where the biggest impacts can be made by the college. Thus, colleges will not contribute to all objectives and goals, but rather, colleges will focus on those goals that most naturally mirror the activity in their areas. Focused effort will be vital to any given college’s success and, thus, the overall success of the university’s nine-year strategic plan.

Support units: For those units that are directly enrolling students or conferring degrees, your role is quite distinct but equally important. If your unit can show direct linkage to any of the metrics discussed in the strategic plan, you are encouraged to consider using such measures to track your progress during the plan and especially during each Waypoint. Given the support role that you serve, it is likely that the metrics in the plan will be directly relevant to your operational goals and plans. For this reason, we have a separate template for support units to use in developing their Cascaded Plans that provides more flexibility and the ability to incorporate projects that will support the Colleges in achieving their goals.

**Resources.** Other processes will be deployed in the coming year to allow a shared understanding of resources and priorities. The University Budget and Finance Committee (UBFC), a committee of the Faculty Senate, will play the central role in making recommendations to match resources to priorities. These priorities will be guided by the university strategic plan. We will also be utilizing enrollment growth and reallocation via program prioritization as a means to provide the resources to fund UBFC recommendations. Thus, colleges/units will have access to a university-level process to request resources in support of their Cascaded Plan. Given that colleges/units will be held accountable for meeting their Cascaded Plan goals irrespective of outcomes from the UBFC process, units are advised to minimize the dependence of the initial activities on new resources. Rather, colleges/units would be well served to address initial resource requirements from current resources (i.e. reallocation of effort, space, budget etc. as needed to start the Cascaded Plan).

**Long-term and short-term.** As presented in the university’s strategic plan, we will break up the long-term (nine year) plan into three segments of three years each. Each three-year segment will be called a Waypoint. Thus, we will have three Waypoints over the course of the entire plan and each Waypoint will have a focused theme. *The Cascaded Plans developed for this first Waypoint will be a three year effort focused on Goals 3 (Transform) and 4 (Cultivate) of the strategic plan with special emphasis on enrollment growth, student success (e.g. improved retention and graduation rates) and employee morale.* The second Waypoint will focus on Goals 1 (Innovate) and 2 (Engage) of the strategic plan with special emphasis on research / graduate program growth and the capital campaign. The final Waypoint will be framed by an assessment of progress to date so that we can finish strong. During each Waypoint, colleges/units will be asked to provide a sketch of their long-range (i.e. nine-year) plans as well as a more detailed description of specific initiatives for that Waypoint’s three year period.

**Cascaded plans – guidelines.** It is most prudent to let the colleges/units frame and organize their Cascaded Plans in a manner that is most meaningful to the people carrying out the important work of the university in support of our strategic plan. With that in mind, the following guidelines are a minimum set of requirements that will allow us to sufficiently coordinate and align our work so that we do not end up “tripping over” each other.

**Project Plans and Milestone.**  For support units in particular, much of the work will not be directly linked to the University’s strategic plan metrics but will require timely completion of projects or process improvements. For this reason, you will see an example below of a Cascaded Plan heavily driven by projects. If you plan to utilize this approach, please provide a plan and milestone summary for the IPEC use and review. Separately a template and example are attached which you may want to utilize if you are not already utilizing a project management tool such as Microsoft Project.

**Cascaded Plan Guidelines**

1. All academic colleges, Vice Presidential areas and other units reporting directly to the President will develop a Cascaded Plan. Vice Presidents may choose to provide separate plans for different parts of their organization. For example, the Executive Vice President and Provost will require separate plans from each college, each Vice Provost area and the Dean of Students/Student Affairs area. Plans are intended to be aggregated at this level for use by the IPE committee.
2. Each Cascaded Plan will cover the time period of July 1, 2016 – June 30, 2019.
3. Each Cascaded Plan will chart the long-term focus in support of the university’s nine-year plan. For Colleges, the Cascaded Plan will identify key university metrics (see page 6 of the university strategic plan) that will be substantially impacted by this long-term plan and a narrative description of the strategy to achieve that impact. For support units, key metrics can be identified in the Cascaded Plan that align with the University’s strategic plan and metrics of success. Ideally, this part of the Cascaded Plan will not change over the course of the nine years, unless external factors or accelerated achievements allow for some refocusing of the long-term goals.
4. Cascaded Plans should map to selected goals/objectives of the University of Idaho strategic plan. For example, if a student services unit chooses to aggressively pursue intervention and self-actualization strategies for Hispanic students, they may choose *Goal 3, Objective C* as their contribution to the university plan. The metric of focus would be the *institutional equity metric* on page 13 of the university strategic plan. Within their unit, this metric may currently be at 50% and the goal may be to raise it to 90% by the end of the first Waypoint, consistent with the university-wide goal.
5. Colleges/units are encouraged to organize and express their unique plans for internal use and communication as they deem fit. However, the attached Cascaded Plan template must be completed and sent to the IPE committee for their use (please note that there are separate templates for Academic vs Support units).
6. Consistent with the Provost Council’s guidance, units have freedom in the style and substance of the final unit Cascaded Plan but there should be broad participation in the development of the plan and direct involvement of university faculty, staff, students and any other key stakeholders.
7. Deadlines for submission of the final Cascaded Plan for academic units is March 1, 2017. Support units must submit a first draft by February 21, 2017 with the final draft due April 14, 2017.

Cascaded Plan for Academic Units – Waypoint 1

July 1, 2016 – June 30, 2019

**College:**

*Long term focus which supports the University of Idaho Strategic Plan:  
 (narrative including which university goal(s) will be central to the unit’s activities over the next nine years and a brief description of anticipated tactics deployed to meet goal(s))*

*Long term institutional metrics (page 6 of university strategic plan):*

*Metric(s) that will be addressed and unit contribution towards those institutional metrics (indicate those utilized, leave others blank – do NOT add unique unit specific metrics)*

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| University Performance Measure | Focus for unit? (Y or N) | University Baseline | Unit Baseline | Unit Target for 2025 | Summary Tactics / Comments |
| Terminal Degrees |  | 275 |  |  |  |
| Societal Impact (Go On measure) |  | TBD |  |  |  |
| Enrollment |  | 11,372 |  |  |  |
| Equity Metric |  | 75% |  |  |  |
| “Great Colleges” Survey |  | 3rd Group |  |  |  |

*Waypoint 1 goal(s) and objective(s), institutional metric(s) (from page 6) and tactics (short narrative description):*

*Key tactics described here in narrative form, as a numbered list. Include a cross referencing to Strategic Plan Goals and Objectives where possible.*

*Waypoint 1 Metric Targets for Unit:*

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| Initiative Number | Selected Performance Measure (from Page 6 of university strategic plan) | Unit Baseline Value | July 2017 | July 2018 | July 2019 | Comments |
| 1 |  |  |  |  |  |  |
| 2 |  |  |  |  |  |  |
| etc. |  |  |  |  |  |  |

Cascaded Plan for Academic Units – Waypoint 1 (Example 1 – Academic Unit)

July 1, 2016 – June 30, 2019

**College: College of Social Work (note- this is not an actual college at UI; this is an artificial example)**

*Long term focus which supports the University of Idaho Strategic Plan:  
 (narrative including which university goal(s) will be central to the unit’s activities over the next nine years and a brief description of anticipated tactics deployed to meet goal(s))*

The College of Social Work is at a pivotal moment and seeks to double its enrollment over the next nine years so as to provide the critical mass of faculty and students that is necessary to have a robust PhD in Social Work. Given our opportunities to engage in social work activities throughout the state and leveraging our state-wide presence in Extension and Research offices, the College of Social Work is positioned to improve the Go On rate via our student and faculty outreach. Our nine-year plan is focused on enrollment growth for the College during Waypoints 1 and 2 which doubles our enrollment from the current 1100 students to over 2500 students. With that growth, we assume our faculty numbers will grow from the current 25 faculty to 40 faculty which would position us to propose and support a new PhD in Social Work program. The program will be delivered via online and distance education approaches with partner institutions in the region, with a special emphasis on social support work within major hospitals and hospice work. In Waypoint 2 and 3 will start to grow our PhD program with the goal to achieve 25 PhD graduates per year by 2025.

*Long term institutional metrics (page 6 of university strategic plan):*

*Metric(s) that will be addressed and unit contribution towards those institutional metrics (indicate those utilized, leave others blank – do NOT add unique unit specific metrics)*

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| University Performance Measure | Focus for unit? (Y or N) | University Baseline | Unit Baseline | Unit Target for 2025 | Summary Tactics / Comments |
| Terminal Degrees | Y | 275 | 0 | 20 | Grow the undergraduate program to support additional research-active faculty and a graduate student program. |
| Societal Impact (Go On measure) | N | TBD |  |  | Although not a direct focus of our Cascaded Plan, we believe that the presence of our graduate students and faculty throughout the state will augment other university initiatives |
| Enrollment | Y | 11,372 | 1100 | 2500 | We will develop focused excellence in hospital-based social support work and hospice work. |
| Equity Metric | N | 75% |  |  |  |
| “Great Colleges” Survey | N | 3rd Group |  |  |  |

*Waypoint 1 goal(s) and objective(s), institutional metric(s) (from page 6) and tactics (short narrative description):*

*Key tactics described here in narrative form, as a numbered list. Include a cross referencing to Strategic Plan Goals and Objectives where possible.*

As discussed in the narrative on our long-range plans, we will be solely focused on growing our undergraduate enrollments during the first Waypoint. In this regard, we feel our long-range distinctiveness will be in hospital care and hospice services. We also believe that we can provide pathways to students into our program via an online certificate option. Faculty will engage with Strategic Enrollment Management (SEM) to find ways to help grow our enrollment and we will invest in upper level advisors to ensure we retain the students we recruit. Specific tactics include:

1. Designate and train five faculty to serve as enrollment champions and allocate sufficient course release to allow the faculty to join SEM on high school visits and strategic events (Goal 3, Objective A).
2. Develop state-wide partners in hospital and hospice settings that will provide internship and experiential learning for our students which will be part of the on-line certificate program (Goal 3, Objectives B and C).
3. Develop a fully on-line certificate program that is stackable with general education coursework to allow students to come to campus for their senior year only to complete their bachelor’s degree (Goal 3, Objective A and B).
4. Develop a comprehensive marketing plan and material as well as a student-to-prospect call center to build a pool of qualified applicants.
5. Hire and train a professional advisor once enrollments grow above 1200 to ensure retention and graduation of our students (Goal 3, Objectives A and B).
6. Survey best practices and processes in the top ten Social Work PhD programs in the USA. Work as a faculty to customize a program that fits within our area of distinctiveness (Hospital Care and Hospice) and develop a proposal to present to the University Curriculum Committee after undergraduate enrollments exceed 1600 (Goal 1, Objective B).

*Waypoint 1 Metric Targets for Unit:*

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| Initiative Number | Selected Performance Measure (from Page 6 of university strategic plan) | Unit Baseline Value | July 2017 | July 2018 | July 2019 | Comments |
| 1-5 | Enrollment | 1100 | 1150 | 1300 | 1600 | Student enrollment above 1500 should result in additional new faculty investments |
| 6 | Terminal Degrees | 0 | 0 | 0 | 0 | Key goal is to have proposal ready for new PhD by end of first Waypoint |

Cascaded Plan for Support Units – Waypoint 1 July 1, 2016 – June 30, 2019

**Support Unit Name (e.g. VP Area etc.):**

*Long term focus which supports the University of Idaho Strategic Plan:*

*(Narrative including which university goal(s) will be advanced and supported by the unit’s highest priority activities over the next nine years and a brief description of anticipated tactics deployed to help the University of Idaho meet goal(s))*

*Mapping and assessing long-term activities with respect to the strategic plan goals and priority institutional metrics (page 6 of university strategic plan):*

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| University Strategic Goal | Focus for unit?  (Y or N) | Unit’s high priority activities to support and advance this goal | Unit Target for 2025 | Corresponding measure of success  (metrics and / or milestones) |
| Innovate (especially terminal degrees) |  |  |  |  |
| Engage (especially Go-on rates) |  |  |  |  |
| Transform (especially Enrollment and Retention) |  |  |  |  |
| Cultivate (especially Work Environment and Inclusivity) |  |  |  |  |

*Waypoint 1 goal(s) and objective(s), and tactics (short narrative description):*

*Key tactics described here in narrative form, as a numbered list that will be performed during the first three years of the plan. Include a cross referencing to strategic plan goals and objectives where possible.*

*Waypoint 1 Metric Targets for Unit:*

*For each numbered tactic on the prior page, please link to the appropriate strategic plan goal/objective and suggest a means of measuring progress over the course of the next three years (e.g. completion dates for milestones, specific measures of progress unique to your unit).*

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| Initiative Number | Strategic plan goal and objective supported | Proposed means to assess progress | Progress by July 2017 | Progress by July 2018 | Progress by July 2019 | Comments |
| 1 |  |  |  |  |  |  |
| 2 |  |  |  |  |  |  |
| etc. |  |  |  |  |  |  |

Cascaded Plan for Support Units – Waypoint 1

July 1, 2016 – June 30, 2019

**Support Unit Name (e.g. VP Area etc.): Division of Finance – Vice President for Finance**

*Long term focus which supports the University of Idaho Strategic Plan:*

*(Narrative including which university goal(s) will be advanced and supported by the unit’s highest priority activities over the next nine years and a brief description of anticipated tactics deployed to help the University of Idaho meet goal(s))*

The strategic plan for the Division of Finance focuses on several key themes over the next nine years. The Division has developed 5 core themes that will guide our work through 2025. These themes are a culture of compliance, a culture of operational excellence, a culture of faculty and staff support, a culture of fiscal responsibility, and a culture of student success.

Culture of Compliance: Higher education has entered an era of rapidly increasing regulatory activity at both the federal and the state level. That increase will require significant cultural change to adapt to ever-growing demands for accountability from policy makers, regulators, and the public. Building a compliance process and a culture that encourages working with regulators is a principle goal for the Division. This theme maps to **Goal 4, Objective C: Improve efficiency, transparency and communication**.

Culture of Operational Excellence: To survive in an era of reduced state funding, diminishing endowment returns, and economic uncertainty, the institution must run its operations more efficiently. Cost savings must be accomplished without affecting our core mission of delivering a quality education and conducting pioneering research. Whether it involves streamlining or standardizing, achieving operational excellence is a continuous process that requires creating sponsors throughout the organization, countering resistance to change, and tracking events to ensure that the changes stay on course. This theme maps to **Goal 4, Objective C: Improve efficiency, transparency and communication**.

Culture of Faculty and Staff Support: Faculty and staff hires are a huge investment by the institution. Their expertise and knowledge is a tremendous asset as we seek to adapt the institution and expand and extend knowledge. We will support innovative activities, teamwork approaches, interdisciplinary programs, and outreach. Through appropriate compensation systems, evaluation and feedback tools, and professional development, we will recruit, retain, and develop highly qualified employees. This theme maps to **Goal 4, Objective A: Build an inclusive, diverse community that welcomes multicultural and international perspectives and Goal 4 Objective B: Enhance the University of Idaho’s ability to compete for and retain outstanding scholars and skilled staff.**

Culture of Fiscal Responsibility: The institution faces a challenging fiscal environment, and sound fiscal responsibility will be required to make the most effective use of finite resources. Fiscal responsibility requires the institution to view financial management and operational planning as complementary strategies in pursuit of the institutional mission and goals. This theme maps to **Goal 4, Objective C: Improve efficiency, transparency and communication**.

Culture of Student Success: Student recruiting and retention are a top priority, particularly in light of the current economic climate. The benefits of even small increases in recruiting and retention include enhanced reputation, lower support costs, and the protection of tuition revenue. We will support approaches that make a difference in the lives of our students. This theme maps to **Goal 1, Objective B Create, validate and apply knowledge through the co-production of scholarly and creative works by students, staff, faculty, and diverse external partners; Goal 3, Objective A: Provide greater access to educational opportunities to meet the evolving needs of society; Goal 3, Objective B: Foster educational excellence via curricular innovation and evolution; and Goal 4, Objective A: Build an inclusive, diverse community that welcomes multicultural and international perspectives**.

*Mapping and assessing long-term activities with respect to the strategic plan goals and priority institutional metrics (page 6 of university strategic plan):*

|  |  |  |  |
| --- | --- | --- | --- |
| University Strategic Goal | Focus for unit?  (Y or N) | Unit’s high priority activities to support and advance this goal | Corresponding measure of success  (metrics and / or milestones) |
| Innovate (especially terminal degrees) | Y | Culture of Student Success | Focused project milestones |
| Engage (especially Go-on rates) | N |  |  |
| Transform (especially Enrollment and Retention) | Y | Culture of Student Success | Focused project milestones |
| Cultivate (especially Work Environment and Inclusivity) | Y | Culture of Compliance  Culture of Op Excellence  Culture of Faculty Staff Support  Culture of Fiscal Responsibility | Focused project milestones and metrics  Focused project milestones  Focused project milestones  Focused project milestones |

*Waypoint 1 goal(s) and objective(s), and tactics (short narrative description):*

*Key tactics described here in narrative form, as a numbered list that will be performed during the first three years of the plan. Include a cross referencing to strategic plan goals and objectives where possible.*

1. Culture of Compliance
2. Spread Pay Transition: To support the goal of improving the efficiency of systems and processes, the Division of Finance will continue to work with the Office of the Provost to reduce barriers so as to encourage employees to transition from spread pay to standard pay. Reducing the volume of spread pay records will reduce the administrative effort required to manage this payroll option and will support the goal of optimizing the standardization of systems and related business processes. (Metric – Number of employees still on spread pay)
3. Bond Post-Issuance Compliance: Division of Finance will coordinate with other Divisions on the creation and implementation of policies and procedures to improve compliance with tax and other regulations related to outstanding bond issues. Compliance relies on coordination of a broad cross-section of departments across campus, which will be managed by establishing clear roles and responsibilities, education, and accountability. (Metric – Milestone completion rate)
4. Culture of Operational Excellence
5. Chart of Accounts Restructure and Standardized Reporting: Division of Finance will redesign the UI Chart of Accounts to better reflect current operational and reporting needs. The goal of the redesign is to optimize the baseline functionality of the current ERP (Banner Finance), which will better support the delivery of standardized reporting across colleges and divisions for improved data for decision-making. (Metric – Milestone completion rate)
6. Travel System Replacement: Division of Finance will seek a travel software solution to replace the current custom-built system. The current travel system is built on outdated technology and is highly dependent on internal resources to maintain. With the significant level of resources spent on travel and travel management within UI, a more reliable vendor-based solution will streamline processes, improve compliance with University policies and external regulations, and enable opportunities to better manage total travel spending. (Metric – Milestones and completion by end of waypoint 1)
7. Optimize Standardization of ERP System and Related Business Processes: Division of Finance will review the Finance and Student Accounts applications within the Banner ERP to identify opportunities to utilize baseline functionality to replace system customizations. The goal will be to reduce dependency on internal ITS resources to manage customized processes, create opportunities to adopt best practices employed by other Banner institutions, and ultimately streamline business processes and improve efficiency of staff. (Metric – Milestones and completion by end of waypoint 1)
8. Shared Services Center: Division of Finance will lead the study, design and (if appropriate) implementation of a shared service center structure to consolidate financial services across the University. Shared services will deliver highly trained, consistent and accurate professional services to UI colleges and divisions. The goal will be to improve transactional processing while also focusing on standards for processing, internal controls through segregation of duties, and improving the quality of institutional data to allow colleges and divisions to rebalance work for the improvement of services to faculty and students. (Metric – Milestones and completion by end of waypoint 1)
9. Culture of Faculty and Staff Support
10. Market Based Compensation: Design and implement a staff compensation system based on average salary data contained in market data from the Bureau of Labor Statistics (BLS) and the College and University Professional Association (CUPA). The system will include adding value for employees which considers previous experience related to the UI position, time-in-service, time-in-position, education, merit, and other characteristics. Using the market data and the additional characteristics, we will be able to calculate more equitable salary distribution among staff employees. (Completion by June 30, 2017)
11. Expand Market Based Compensation: Assist the Provost and faculty in the development of a salary administration system for faculty based on market data. (Completion by June 30, 2017)
12. Performance Management: Work with staff employees and supervisors to create a user-friendly and meaningful approach to performance management. Anticipated issues to address include creating a performance management philosophy, simplified and consistent annual evaluation forms/processes, and supervisory training and support towards employee development:
    * Philosophy: Performance management should be part of the culture of UI. Feedback regarding performance and development efforts should be on-going and offered throughout employment; not just a report once each year.
    * Forms/Processes: Design forms and processes to fit within the philosophy. Create forms/processes that are easy to use and provide meaningful information for the employee and the institution.
    * Supervisory Training: Provide training and development opportunities for supervisors to understand UI philosophy and processes.

(Metric – Milestones and completion by end of waypoint 1)

1. Culture of Fiscal Responsibility
2. Debt Capacity Analysis and Debt Policy: Division of Finance will conduct an analysis of the University’s debt capacity and develop a debt policy to guide University decisions related to existing and future debt obligations. The University’s use of debt plays a critical role in ensuring adequate and cost effective funding for the capital plan.   By linking the objectives of its Debt Policy to its strategic objectives, the University ultimately increases the likelihood of achieving its mission. (Metric – Milestones and completion by end of waypoint 1)
3. Centralized Resource Management: In coordination with the Institutional Planning and Effectiveness Committee, utilize the outcomes of the Program Prioritization process to better inform funding decisions.
   * Include quintile information with the University Budget and Finance Committee budget recommendations to ensure that both one-time and permanent funding is being allocated appropriately
   * Implement a central control process for General Education position funding:
     + Use quintile and market-based compensation information when making position funding decisions
     + Detailed funding plan by quintile to be determined by the Institutional Planning and Effectiveness Committee

(Metric – Milestones and completion by June 30, 2017)

1. Incentive Based Funding Model: In coordination with the Institutional Planning and Effectiveness Committee, investigate incentive funding model for academic units. (Metric – Milestones and completion by June 30, 2018)
2. Culture of Student Success
3. Cultivate a culture of student success that will enhance new student recruitment and retention of students that are currently enrolled. Auxiliary Services will align organizationally with current national and state structures. This will involve a reorganization of Auxiliary Services to provide services that impact and support students outside of the classroom into a single department. Included will be the assessment of current operations and contracts to ensure the University of Idaho and the students are receiving the best and most up-to-date services available in accordance with best practices nationally. Specific tactics include:

* Assess and compare Auxiliary Services with national and state organizational structures
* Assess and evaluate current contracts to ensure the contractors support the strategic plan by providing goods and services that are beneficial to the student experience
* Develop a plan for a consolidated Student Services Center to include housing, dining, campus card and parking to enhance the student experience and provide one stop service
* Review current Auxiliary Services policies, procedures and processes to ensure they are aligned with the University and provide the appropriate and up-to-date guidelines to provide excellent student service
* Assess current technology hardware and software to ensure they are up-to-date and adequate to support the needs of the students and enhance the student experience

(Metric – Milestones and completion by end of waypoint 1)

*Waypoint 1 Metric Targets for Unit:*

*For each numbered tactic on the prior page, please link to the appropriate strategic plan goal/objective and suggest a means of measuring progress over the course of the next three years (e.g. completion dates for milestones, specific measures of progress unique to your unit).*

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| Initiative Number | Strategic plan goal and objective supported | Proposed means to assess progress | July 2016  (baseline) | July 2017 | July 2018 | July 2019 |
| 1. Spread Pay Transition | 4C | # employees on spread pay | 400 | 300 | 200 | 100 |
| 1. Bond Compliance | 4C | Completed milestones | 0 of 20 | 7 of 20 | 15 of 20 | 20 of 20 |
| 1. Chart of Accounts | 4C | Completed milestones | 0 of 90 | 65 of 90 | 90 of 90 | n/a |
| 1. Travel System | 4C | Completed milestones | 0 of 40 | 10 of 40 | 20 of 40 | 40 of 40 |
| 1. Optimize ERP | 4C | Completed milestones | 0 of 40 | 10 of 40 | 20 of 40 | 40 of 40 |
| 1. Shared Services | 4C | Completed milestones | 0 of 40 | 10 of 40 | 20 of 40 | 40 of 40 |
| 1. Market based comp | 4A,4B | Completed milestones | 0 of 40 | 40 of 40 | n/a | n/a |
| 1. Faculty market comp | 4A,4B | Completed milestones | 0 of 40 | 40 of 40 | n/a | n/a |
| 1. Performance management | 4A,4B | Completed milestones | 0 of 40 | 10 of 40 | 20 of 40 | 40 of 40 |
| 1. Debt capacity analysis | 4C | Completed milestones | 0 of 40 | 10 of 40 | 20 of 40 | 40 of 40 |
| 1. Resource Management | 4C | Completed milestones | 0 of 4 | 4 of 4 | n/a | n/a |
| 1. Incentive based funds | 4C | Completed milestones | 0 of 10 | 2 of 10 | 10 of 10 | n/a |
| 1. Student enrollment | 1B,3A,3B,4A | Completed milestones | 0 of 40 | 10 of 40 | 20 of 40 | 40 of 40 |