What are Enhanced Planning Tools?

• A way to align resources (money, space, time, people) with strategic priorities using data on key indicators

• Quantitative and Qualitative information to inform resource allocation for every unit on campus

• In short: consistent, easily-available, campus-wide data to help us reach decisions and measure our success
What is new about this approach?

• Data provides administrators with quick reference to the most important indicators of our success in a single location, and information is archived year to year

• The new system provides quick, consistent access to data that is the same across all units

• Enhanced Planning Tools allows data to be used with greater transparency and rigour, and for the same base data to be applied consistently across all academic and administrative units from year to year

• Current Planning process and policies remain the same
How were Enhanced Planning Tools developed?

• Faculty and staff requested a more transparent, data-informed approach to facilitate planning and align resources with university priorities (President’s Campus Conversations)

• A working group and an advisory committee, in consultation with University leaders, developed Enhanced Planning Tools categories and measures

• UVic Systems developed new software to deliver, collect and archive data
What is the scope of the project?

• Six campus-wide criteria for assessment
  Quality, Demand, Productivity & Efficiency, Impact and Contribution, Context & Opportunity, and Financial Considerations

• Central data sets and qualitative measures in each of the six areas with information specific to three types of units—Academic, Administrative and Support, and Research Centres

• Administrators from unit heads to VPs are able to view annual reports for each of their units and roll-up reports with aggregated data from all units they supervise at any time in the on-line software
Qualitative Data in EPT Reports

• Qualitative data will be collected from units through a set of questions in each of the six Criteria

• Questions provide units with an opportunity to contextualize the data provided and to report their progress on key initiatives
Sample Questions—Quality Criterion

Top indicators of teaching recognition/success

*List the top 3 indicators of national or international teaching recognition/success in your unit*

Incorporation curricular review/redesign and innovation in teaching

*Describe 3 indicators of having incorporated curricular review/redesign or other evidence of teaching innovation into your teaching methodologies (e.g. flexible delivery)*

Measures of quality/impact of research

*How does your unit measure the quality/impact of your research? (See below for possible examples) (List all that apply)*

**Research publications**
- a) Refereed journal publications
- b) Refereed conference papers
- c) Books and monographs
- d) Other publications
- e) Citations
- f) Professional or expert testimony
- g) Participation in research centers
- h) Joint publications

**Creative and artistic achievements**
- a) Artistic performances or exhibits
- b) Digital performances, exhibits, or critical commentary
- c) Commissioned works
- d) Professional recordings
- e) Published critical reviews
- f) Fully produced films or videos
- g) Literary and creative publications
Sample Questions - Impact and Contribution Criterion

Alignment with university's strategic plan

Briefly describe the top 3-5 ways your unit’s programs and services: Align with the university’s mission, strategic initiatives, integrated plans and goals; and make use of the UVic Edge components.

Differentiation

How does your unit help the university differentiate itself from other institutions?

Contributions to the community

What benefits, or contributions, does your unit offer to communities?

Support of equal rights and dignity

List the ways your unit supports the strategic plan value statement of equal rights and dignity for all persons (policy link http://www.uvic.ca/universitysecretary/assets/docs/policies/GV0200_1105.pdf)

Relationships to other units

What is the relationship of your unit to the success of other units?
Sample Questions-Productivity and Efficiency Criterion

Change to curricula

To what extent has your unit’s program curricula expanded, narrowed its focus, or changed direction over the past 3 years? What were the contributing factors?

Please include:

1. What have you done to internationalize your unit’s curricula?
2. Have you increased the number of experiential offerings in your unit?
3. What have you done to indigenize your unit’s curricula?
4. What have you done to increase student research opportunities or to ensure that the curricula is enriched by the research activities of the university?

Benchmarks

Are there benchmarking measures (comparisons with other universities, or other metrics including accreditation standards) your unit is able to provide to assess the productivity, efficiency and effectiveness of services provided? If so, what are the results of your analysis and what does it tell you about your operations?

Process and procedure documentation

Does your unit have well defined and documented processes, procedures, governance documents, and/or learning outcomes? When did your unit last update your Evaluation Policy and Duties and Responsibilities documents?
Sample Questions-Financial Criterion

Future cost planning

*What equipment replacement strategies do you have to ensure the timely replacement of critical research, instructional and office equipment?*

*Have you prepared an analysis of future replacement costs to support these strategies? Have you allocated sufficient budget to the equipment reserve to cover these costs?*

Potential salary risks

*The following questions are intended to ensure units and leaders are aware of salary commitments that may result in a financial risk to your unit.*

a) *Do you have salaries that are funded by sources other than base budget? If so, for how long is the current funding available and do you have operational plans for when the funding ends to either address the loss of personnel or the costs associated with the end of employment (vacation pay, overtime, severance if applicable, etc.)*?

b) *Do you have employees who work considerable amounts of overtime, year after year, resulting in accumulations of CTO or OT balances or costs? If so, are these costs base budgeted or are you using other sources of funding to pay these costs? Do you have plans to minimize or eliminate these costs?*
Centrally Provided Data in EPT Reports

- Central data is provided in a dashboard view in the form of interactive graphs or charts or in table form
- Any graph, table or chart can be downloaded and/or printed
- Graphs, tables and charts are supported with further information that is accessed by clicking the “see data” button
- Links to more extensive data sets are provided when available
Sample Graph-Quality Criterion

Evaluation and Outcomes

Year

2010/11 2011/12 2012/13 2013/14 2014/15

Percent

0 25 50 75 100

Employed  Pursuing Further Education  Quality of Instruction  Student Satisfaction

2014/15 95%

See data
### See data

<table>
<thead>
<tr>
<th></th>
<th>2010/11</th>
<th>2011/12</th>
<th>2012/13</th>
<th>2013/14</th>
<th>2014/15</th>
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<tr>
<td>Employed</td>
<td>88%</td>
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<td>97%</td>
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<td>96%</td>
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</tr>
<tr>
<td>Student Satisfaction</td>
<td>97%</td>
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### BGS Measures

The Baccalaureate Graduate Survey contacts students two years after they successfully complete their undergraduate degree. Graduates are asked a range of questions regarding their experiences while at UVic, the knowledge and skills they acquired in their studies, and their subsequent further education and employment outcomes. UVic publishes a range of reports for every academic unit and Faculty annually (see the link below).

**Student Satisfaction** Students are asked to rate their satisfaction with their program at UVic. The percentage displayed in this measure includes the "Very Satisfied" and "Satisfied" responses to the question.

**Quality of Instruction** Students are asked to rate the quality of instruction received in their program at UVic. The percentage displayed in this measure includes the "Very Good" and "Good" responses to the question.

**Further Education** indicates the percentage of graduates who have pursued some form of further education or training in the two years following the completion of their degree at UVic.

**Employment** indicates the percentage of graduates who are in the labour force and are either working or have a paid job lined up.

For more information see [UVic Student Outcomes](https://www.uvic.ca/aboutuvic/uvic-administration/uvic-annual-report/uvic-annual-report-student-outcomes.html)
Or the [Baccalaureate Graduates Survey](https://www.uvic.ca/baccalaureate-graduates-survey.html)
Sample Graph - Demand Criterion

Graduate admissions

Year

Count

2010 2011 2012 2013 2014

Graduate Applicants  Graduate Admits  Graduate Registrants
Sample Graphs - Financial Criterion

2014/15 Percent of base budget allocated to unit

- Your unit
- Other units

See data

<table>
<thead>
<tr>
<th>Category</th>
<th>Amount (CAD)</th>
<th>Percent</th>
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<tbody>
<tr>
<td>Your unit</td>
<td>$3,242,308</td>
<td>68.08%</td>
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<tr>
<td>Other units</td>
<td>$1,519,927</td>
<td>31.92%</td>
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The data in this graph was calculated from the [Financial graph data](#) for your unit.
Salary considerations

2014/15 Salary base budget by employee group

- Faculty: 89.36%
- CUPE 951, reg F/T & P/T: 5.83%
- CUPE 951, term/casual: 0.18%
- Other Instruction: 3.54%
- Sessionals - Cont.: 1.09%

The data in this graph was calculated from the Financial graph data for your unit.

See data

<table>
<thead>
<tr>
<th>Employee group</th>
<th>Amount (CAD)</th>
<th>Percent</th>
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<td>CUPE 951, term/casual</td>
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<td>Faculty</td>
<td>$710,593</td>
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<td>Other Instruction</td>
<td>$28,140</td>
<td>3.54%</td>
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<td>Sessionals - Cont.</td>
<td>$8,682</td>
<td>1.09%</td>
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2014/15 Percentage of base budgeted FTE by employee group

- Faculty: 78.31%
- CUPE 951, reg F/T & P/T: 12.05%
- CUPE 951, term/casual: 0.36%
- Other Instruction: 7.11%
- Sessionals - Cont.: 1.57%

The data in this graph was calculated from the Financial graph data for your unit.
What is the final result?

• Currently units are reviewing their central data and providing answers to the qualitative questions to create the first complete institutional data set within Enhanced Planning Tools

• By the end of February we will have a full report, (which will be refreshed annually), for each unit (approx. 136 across campus)

• New software that is adaptable to allow for new/different measures as UVic reviews its strategic priorities over time
Questions?