Strategic Resource Allocation: Overview

• In August 2012, President Hurley announced a process of Strategic Resource Allocation
• Two task forces were created to look at Academic Programs and Support Functions, respectively
• Purpose is ‘to make UMW more distinctive through strategic investment in existing programs and/or the creation of new ones that increase our competitiveness’
• Funding for investment must come from within
• Task Forces make recommendations; all decisions are to be made by Pres. Hurley’s office
Who are we?

The Support Task Force comprises
- 9 staff members, appointed
- 4 faculty, elected then appointed
- 1 student, appointed

A Facilitation Group has been established, comprising UMW staff in the areas of communications, technology, institutional research and finance. This group will help us with mechanics.
What qualifies us?

• We received 2 days of training from consultant Larry Goldstein; most also read a book on Reallocation by Robert Dickerson
• During Day 1, we got to know each other and our strengths and weaknesses
• We also decided the 6 criteria by which we will test each function
• During Day 2, we worked with the Academic Task Force to decide universal decision making protocols
Decision making protocols

By what process does the committee make decisions?

1. A **quorum** consists of **80% of the task force** (11 members)
   - All members will attend all meetings whenever possible
   - Electronic attendance is acceptable

2. When a **vote** is required (e.g. to place a function into a category), **80% of the task force** (11 members) must be in agreement for the vote to carry.
   - Votes will only occur if all members are present, although members may send in their votes (not a proxy).
   - Each member is required to vote whenever a vote is needed, even if it concerns their own program or function.

3. On occasion, if a task force is stalled over a vote, it may utilize a **fallback position of 75%** (10 members)
Identification of Functions

• A Support Function is anything that consumes resources (personnel, space, money, etc.)
• We used the financial ORG list, the UMW Org Charts, and a survey to create a list of functions and their responsible personnel
• Functions should have a purpose and should not consist of ‘tasks’
• Each function will have a template
Template Completion

• Templates will be filled electronically by one or more Responsible Parties – likely in consultation with others in their department

• A table citing costs of that function will be completed with the help of the Facilitation Group. This is not part of the template but is required along with the template

• Templates will be reviewed by the appropriate cabinet level person before being submitted through the web site

• All templates will be public to the UMW community
Your tasks...

1. Help us identify function with Responsible Party & Cabinet Level person
2. Responsible Party(ies) works with Facilitation Group to complete Costs Table
3. Template is saved ‘in progress’ – can be changed
4. Responsible Party(ies) works within own department to complete Template
5. When complete, Template is submitted up hierarchy: it is ‘in review’
6. Cabinet Level person ‘Published’ finalized template
Our Tasks...

- Identify Functions
- Develop Template
- Conduct Testing
- Assess each template
- Acquire completed Templates
- Train the community
- Write a report with recommendations

(Decisions are made by the President’s Office)
Timeline

• **October 3-10**  
  - Training of the entire community

• **October 3 – November 4**  
  - Completion of templates

• **November 4 - November 11**  
  - Deadline for Cabinet Review Submission

• **October 3 – March 17**  
  - Template assessment

• **May 1, 2014**  
  - Formal report with recommendations released