



Strategic Resource Allocation Northern Michigan University 2017

Tentative Timeline

Typically, the process from beginning to end takes no more than one year. It concludes with the submission of a report of recommendations to the President and members of the university's governing board. The full process timeline will be identified following the NMU Board of Trustees' Feb. 16 meeting. The campus will begin the process with the on-campus Jan. 31-Feb. 2 information sessions led by consultant Larry Goldstein.

Leadership

Project Co-Chairs – Kerri Schuiling, Vice President of Academic Affairs and Provost, and Gavin Leach, Vice President of Finance and Administration

Facilitation Group Chair – Dale Kapla, Associate Provost

Academic Program Review Task Force Chair – Carol Johnson, Business & David Wood, Modern Languages & Literatures.

Support Task Force Chair – Jeff Korpi, Housing and Residence Life & Tricia Bush, Recreation Services.

Consultant - Larry Goldstein, President, Campus Strategies, LLC

Process Model

The project's approach will be customized to Northern, however it is somewhat modeled on the process in *Prioritizing Academic Programs and Services* by Robert C. Dickeson. The process will be adapted to meet NMU's specific needs. Northern's mission and vision of the university, and its strategic plan, will be the guides for decision-making about the recommendations.

Resource Assessment and Allocation

This is not intended to be a cost-cutting exercise. Rather, over a multiyear period we intend to evaluate all academic and non-academic programs and services and their resource allocations. To assess needs for higher levels of contribution to the university's overall success. In particular, we want to make additional investments in programs that are, or have the potential, to perform exceptionally well.

Task Forces

It is important to note that the two task forces – academic program review and support functions review – are recommending rather than implementing entities. There will be a formal process for the review of the final report, made publicly available upon its completion. It will be the responsibility of the institution's senior leadership—the members of the Leadership Council and President—to decide which recommendations to accept and implement, and on what timetable. All laws, contracts, and NMU policies will be adhered to during the implementation phase following the completion of the assessment process.

Although the specific assessment criteria and weighting will be developed by the respective task forces, their charges will contain the following language:

Each task force is expected to adhere to two principles in carrying out their responsibilities. First, the criteria must be holistic. That is, task force members must take into consideration the full gamut of assessment factors including both qualitative and quantitative, financial and nonfinancial, and any other relevant measures of performance.

The second principle is that the criteria must result in a fair assessment of all programs and services. Although the differences among programs and support functions will result in some faring better on some criteria than others, the selection and weighting of criteria must ensure that no individual activities are unfairly treated in the process.

The task forces will be staffed by faculty and staff but not students due to the amount of work entailed and the impact this would have on their studies. However, there will be opportunities for student feedback as the project progresses. Members of the task forces will be selected shortly.

Although Northern will seek to ensure that the task force participants bring perspectives from all sectors of the institution, it is critically important that everyone recognize that they will not be representing any individual unit or constituency. Instead, they will be asked to adopt a “trustee mentality.” In other words, though they bring knowledge and experience shaped and informed by involvement in their unit, they must adopt an institutional perspective when they undertake this effort.

The task forces will receive administrative and logistical support from the Academic Affairs Division, as well as from a facilitation group chaired by Dale Kapla, associate provost, and staffed with representatives from departments responsible for accounting, budget, communication, facilities, human resources, information technology and institutional research. Additionally, they will rely on advice from Larry Goldstein, president of Campus Strategies, LLC, who will serve as a consultant to assist with this process.

Focus on Data

A tremendous amount of data will be collected. A database will be developed through this process and it is our intention to maintain it and update it annually. We anticipate that the strategic resource allocation process will be conducted again in approximately five years and, over time, become a standard element of Northern’s periodic strategic planning process.

Transparency

This process will be undertaken in a transparent manner. This means that, with the exception of the deliberations regarding individual programs and the other inner workings of the task forces, all facets of the process will be shared widely and updated regularly. Periodic Q&A sessions will be provided and discussions on the project’s progress will be a part of any regularly scheduled university forums taking place prior to the report date.