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MEMORANDUM

ATTENTION Senate
FROM Jon Driver, Vice-President, Academic and
Provost, and Chair, SCUP
RE: Revisions to the Academic Planning Process (SCUP 12-16)
DATE May 22, 2012
PAGES 1/1

At its May 16, 2012 meeting SCUP reviewed and approved the revisions to Senate Guidelines for Academic Plans S.06-62.

Motion:

That Senate approve the revisions to Senate Guidelines for Academic Plans S.06-62.

encl.



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MEMORANDUM

ATTENTION SCUP
FROM Jon Driver, Vice-President, Academic & Provost
RE: Revisions to the Academic Planning Process
DATE April 10, 2012
PAGES 1

The attached documents consist of the current guidelines for academic planning and proposed revisions to these guidelines.

The revisions reflect my experience with the development and implementation of the 2010-13 academic plan and the early part of the process for the next plan. There are three major changes:

- a. The academic plan would be a five-year, rather than three-year plan. This should alleviate some concerns about planning exercises occurring too often, and will provide a more realistic time frame for completion of major initiatives.
- b. The academic plan will still be developed in a consultative, iterative way, but the first phase will be developed by the Vice-President, Academic to reflect institutional priorities in the context of the prevailing post-secondary landscape provincially and nationally.
- c. The guidelines reference the University's vision and mission

I am asking SCUP to recommend these guidelines to Senate for approval.

Senate Guidelines for Academic Plans

Proposed revisions to **S.06-62**

Each academic unit¹ shall prepare a **five-year** academic plan in the same year.

Academic plans should support the Vision/Mission of the University and are intended to guide the operation and development of the academic unit. These plans may be used by the Dean and Vice President, Academic in making decisions on the allocation of resources.

Parallel procedures will be used for plans of academic service/support² units.

1. Time Line:

- 1.1 The Vice-President Academic will prepare a draft academic plan at the start of the year in which planning occurs. Following consultation, the Vice-President will distribute a final plan that reflects high level academic priorities and indicators of success. It is expected that academic units and Faculties will develop plans that support the overall academic priorities, while focusing on the particular goals of the units and Faculties. The plan will be distributed by the end of the **first week of May** of the year in which planning is undertaken.
- 1.2 Academic unit five-year plans are to be completed by the end of the **first week of August** of the same year.
- 1.3 Each Faculty Dean will prepare a five-year academic plan on the same schedule. (For departmentalized Faculties these plans will be developed in consultation with the academic units within that Faculty). These plans are to be completed by the **first week of October** of the same year.
- 1.4 The Vice-President, Academic will incorporate Faculty and service/support unit plans into the final high level academic plan by **mid-November** of the same year. This document will be submitted to SCUP for its review and forwarded to Senate for information.

2. Content:

- 2.1 The **academic unit** will determine the organization of the plan but plans should include/consider the following information.(Deans may request their Units to include additional content);

¹ Academic Departments, Schools, and Programs.

² Graduate Studies, Student Services and Lifelong Learning

2.1.1 Performance Review

- The most recent unit external review report and resulting action plan should be considered in preparing the plan.
- An assessment of achievements against the previous plan.

2.1.2 Programme Overview:

- A brief overview of the undergraduate and graduate programs offered by the unit, including major current and future program development and revision activities.
- Describe the participation of the unit in other University programs, including interdisciplinary activities as well as Life-long Learning and Work-integrated Learning.

2.1.3 Plans

- **Engaging Students:** Plans around teaching and learning as well as recruitment and support issues for undergraduate and graduate students. Issues regarding International Students may also need to be addressed.
- **Engaging Research:** A summary of the research activities of the unit's members and how these relate to the SFU Research Strategic Plan.
- **Engaging Communities:** Plans to maintain and expand the unit's community connections, the creation of opportunities for community-based learning, and the role of community partners in research.

2.1.4 Resources:

Assess the current (and projected) resources available to the unit in relation to the priorities and objectives proposed. This should include:

- faculty complement – including renewal
- support staff
- instructional resources
- equipment
- operating budgets
- space

Sources of any additional financial resources other than what is expected to be allocated by the Dean over the period need to be identified and agreed with the Dean.

- 2.2 Communication:** An outline of the communication process to ensure all unit members are informed of the objectives and content of the plan.

- 2.3 **Faculties:** All faculties, including non-departmentalized faculties, should submit a plan according to the **template agreed** between the Deans and the Vice President Academic.

3 **Annual Update.**

Each academic year academic units, Faculty Deans, and the Vice President, Academic will prepare a brief update to their academic plan. This will be completed before **November 30** of each year to inform discussions at the Deans' Council and feed into the formal Budgeting process.

4 **Data Provision.**

The Vice- President, Academic, through the office of Institutional Research and Planning will provide statistical information for use in academic plans and plan updates.

May 2012



Senate Guidelines for Academic Plans S.06-62

1. Each academic unit* shall prepare a three-year academic plan in the same year. Academic plans are intended to guide the operation and development of the academic unit and will be considered by the Dean and Vice President, Academic in making decisions on allocation of resources. Academic unit plans are to be completed by June 30 of the year in which three-year planning is undertaken.

** Departments, Schools, Programs. Parallel procedures will be used for plans of academic service units.*

2. Each Faculty Dean will prepare a three-year academic plan on the same schedule. (For departmentalized Faculties these plans will utilize the three-year academic plans of academic units within that Faculty as a basis for planning). These plans are to be completed by the first Friday in October of the same year.

3. The Vice-President, Academic will prepare a three-year academic plan on the same schedule as the Faculty plans. This plan, which is to be completed by November 30 of the same year, will utilize the three-year academic plans of the Faculties and of academic service units. It will be submitted to SCUP for its review and forwarded to Senate for information.

4. Academic plans should give consideration to the elements in the Statement of Purpose for the University approved by Senate and the Board of Governors in 1998.

5. Content of Academic Plans

5.1 Academic Unit: Plans should include the following information. The unit will determine the organization of the plan. The most recent unit external review should be considered in preparing the plan.

(a) An assessment of achievements against the previous plan.

(b) A statement of objectives for the current planning period.

(c) Programmes: A brief overview of the undergraduate and graduate programs offered by the unit, including program development and revision activities.

The participation of the unit in other University programs, including interdisciplinary activities as well as with Continuing Studies and Co-operative Education.

(d) Students: Recruitment and support issues for undergraduate and graduate students. Issues regarding International Students may also need to be addressed.

(e) Research: A summary of the research activities of the unit's members and how these relate to the SFU Research Strategic Plan.

(f) Resources: The adequacy of resources available to the unit in relation to their situation and objectives. This will include faculty complement, support staff, other instructional resources, operating budgets, equipment, and space. The plan should include a component for the renewal of the unit's faculty resources.

(g) Communication: An outline of the communication process to ensure all unit members are informed of the objectives and content of the plan.

5.2 Faculties: All faculties, including non departmentalized faculties, should submit a plan according to the template agreed between the Deans and the Vice President Academic.

6. Each academic year academic units, Faculty Deans, and the Vice President, Academic will prepare a brief update to their academic plan. This will be completed before November 30 of each year to feed into the formal Budgeting process. The plan update of the Vice President, Academic will be submitted to SCUP for its review.

7. The Office of the Vice- President, Academic, will provide statistical information for use in academic plans and plan updates. This will include an annual budget outlook.

May 2006