



Integrated BFA Planning & Budgeting Process

OVERVIEW

PURPOSE

To develop from the bottom up, with University-wide input, a transparent BFA strategic plan (including an environmental scan, SCOT Assessment, Mission, Vision & Strategic Objectives and Six-Year Plan and Initiatives) leading to BFA's 2015-17 Budget Proposals.

Current BFA strategic documents under review:

1. [2010 SCOT Assessment](#)
2. [Current Mission, Vision & Strategic Objectives](#)
3. [Current Six-Year Plan and Initiatives](#)
4. [BFA Organizational Chart](#) (for reference only)

PROCESS

This is an overview of the process. Please see the process SCHEDULE for details on specific dates and activities. The key phases of the process include:

Environmental Scan – Through Friday October 31st

During this phase, the University community will be requested to provide input and guidance to BFA leadership.

BFA's current mission and vision is simply to serve Western with best-in-class services. As we review and renew our strategic planning documents, we look to those we serve, both within and beyond BFA borders, for input and guidance on what we do well and where we can improve in order to help them reach their strategic goals and thus our own.

We seek input and guidance on subject matter that aligns with BFA's strategic planning documents. We are also receptive to input offered about our division's day-to-day operations, including the level of service that we provide others, as that pertains to our Strengths, Challenges, Opportunities and Threats (SCOT), which is defined below. Such input will shed light upon what is positively or adversely impacting our ability to successfully reach our strategic goals.

Please keep in mind that this particular process is not for the purpose of expressing specific concerns about employee workplace conditions or working relationship with a supervisor or other employees.

- **Within BFA**

- Town Halls – 4 of them – Presented by VP, AVPs and directors. Its purpose is to describe the BFA strategic planning process; Emphasize the process's inclusiveness and employee engagement; Announce AVPs and directors plans to solicit input simultaneously from staff; Announce other ways to provide feedback via [BFA Strategic Plan Review & Renewal webpage](#) (SurveyMonkey link, email, campus mail).
- Methodology is department specific, but each Director and AVP solicit input from their staff for both division and department SCOT Assessments, Mission, Vision & Strategic Objectives, and Six-Year Plan and Initiatives; Compile and vet with direct reports for relevance at either the department or division level. AVPs and directors share with other to analyze relationships between them. Department plans can be found [here](#).

- **Beyond BFA**

- Meet with the Council of Deans
- Academic Affairs – Meet with each of the college deans and their operations managers and department chairs, and Vice Provosts
- Enrollment and Student Services – Meet with SVP and directors at a weekly ESS directors meetings
- University Advancement & University Relations and Community Development – Meet with both VPs and their selected attendees
- Associated Students – Meet with the AS board at a regular meeting

BFA AVPs and Directors – Overlapping, but not directly part of this phase, each BFA AVP and Director will conduct a departmental **environmental scan** and meet with their staff to develop a department **SCOT Assessment**. It will be important to actively engage staff and

communicate back to staff what was heard. A draft departmental SCOT Assessment will be submitted to Rich and Paul on or before 10/31/2014.

SCOT Assessment & Mission, Vision & Strategic Objectives – Through Wednesday, February 4th

SCOT Assessment: During this phase, BFA leadership will utilize departmental SCOT Assessments and listening sessions feedback for development of a division SCOT Assessment. A SCOT Assessment is a tool commonly used in a strategic planning setting that identifies and assesses the Strengths, Challenges, Opportunities and Threats (SCOT) of the division (and departments). Strengths and Challenges are internal factors while Opportunities and Threats are external. The goal of any SCOT Assessment is to maximize Strength and Opportunities while minimizing the impact of Challenges and Threats to ensure the success of BFA's Mission, Vision & Strategic Objectives.

Definitions:

- **Strengths:** A division strength is an internal characteristic that gives it an advantage in successfully achieving its Mission, Vision & Strategic Objectives.
- **Challenge:** A division challenge is an internal characteristic that creates a disadvantage in achieving its Mission, Vision & Strategic Objectives.
- **Opportunities:** An opportunity is an external condition (external to BFA) that could positively impact the division's performance and thus achievement of its Mission, Vision & Strategic Objectives.
- **Threats:** A threat is an external condition (external to BFA) that could negatively impact the division's performance and thus creates an obstacle to achieving its Mission, Vision & Strategic Objectives.

BFA AVPs and Directors – Overlapping, but not directly part of this phase, each BFA AVP and Director will engage with their staff to review the division's current **Mission, Vision & Strategic Objectives** and submit departmental feedback to Rich and Paul on or before 11/9/2014. Again, it will be important to actively engage staff and communicate back to staff what was heard.

Mission, Vision & Strategic Objectives: The current Mission, Vision & Strategic Objectives remains viable to BFA and substantial revisions are not anticipated. However, in this phase, the

document will be updated as necessary based on our findings under the SCOT Assessment and departmental feedback.

Definitions:

- **Mission:** A statement that describes the unique purpose or function of the division and who we serve.
- **Vision:** A description of what the division hopes to achieve.
- **Strategic Objectives:** Statements expressing the division's specific objectives, often stated without time lines, in pursuit of its Mission and Vision.
- **Values:** Describe the principles and beliefs that are held in common by the division that guide our behavior.

BFA AVPs and Directors - Overlapping, but not directly part of this phase, each BFA AVP and Director will engage their staff to develop a department **Six-Year Plan and Initiatives**, utilizing the division SCOT Assessment and evolving Mission, Vision & Strategic Objectives. Each department will coordinate directly with collaborating departments. Plans will be submitted to Rich and Paul on or before 1/30/2015.

Six-Year Plan and Initiatives – Through Wednesday, July 1, 2015

BFA's Six-Year Plan and Initiatives outlines the division's major strategic objectives, evolving from departmental priorities that are determined by the division to have strategic significance. In this phase, BFA's Six-Year Plan and Initiatives will be developed utilizing the division SCOT Assessment and Mission, Vision & Strategic Objectives, and department Six-Year Plans and Initiatives developed during their internal processes. The division plan is closely tied to the 2015-17 Budget Proposals in that anticipated sources of funding are proposed for the various strategic objectives.

BFA AVPs and Directors - Overlapping, but not directly part of this phase, each BFA AVP and Director will be working on their department's **2015-17 Budget Proposals** utilizing department (and evolving division) Six-Year Plan and Initiatives, division SCOT Assessment and division Mission, Vision & Strategic Objectives. Department's will make permanent and one-time requests from University and division rebasing funding sources. Proposals are due to Rich on or before 3/2/15.

2015-17 Budget Proposals – Through August 2015

After the department's internal budget development process mentioned above, each AVP and Director will meet with Rich and Nicole Goodman to finalize their department's 2015-17 Budget Proposal. The BFA Leadership Team will then meet to condense the departmental proposals into the division's preliminary 2015-17 Budget Proposal, which is due to the Budget Office on 3/25/2015. BOT approval and feedback of this preliminary budget proposal will be sought within the context of the timing of the state's budget process. The BFA Leadership Team will then meet in July and August to finalize the 2015-17 Budget Proposal utilizing BOT feedback. The BOT approval of the final budget will be sought at their August meeting. Once approved, it is sent to OFM.

COMMUNICATION PLAN

The intent of the communication plan is to keep the University community engaged in the process and to announce opportunities for their input and guidance.

- *Western Today* announcement about launching the effort and what to expect in the near future regarding opportunities to provide input and guidance.
- University Planning and Resources Council (UPRC) – This important committee is responsible for many aspects of University Planning and allocation of resources. UPRC is a standing committee of the Faculty Senate with University-wide representation. Its calendar and agenda is posted online and meetings are open to the University community.
- Outlook invitations to scheduled meetings
- Flyer invitations to BFA Town Halls
- Website
 - www.wvu.edu/bfa/ Eye-catching link to “[BFA Strategic Plan Review & Renewal](#)” We will post draft documents on the website as they are ready and invite feedback. Please review and provide comments so we can be sure to have the best and most informed plan possible.
 - The website will have a link to SurveyMonkey and email (VPBFA.Office@wvu.edu)
 - A PDF form will also be available for supervisors to download for employees who do not have access to a computer. Those comments can be sent via campus mail to VPBFA MS-9044.