

APPENDIX B

UNIT SELF-EVALUATION SUMMARY TEMPLATE

The planning template is designed to be used as a guideline in conducting the unit self-evaluation and should include as a minimum the following:

- I. Introduction (Mission, Vision, Values)
- II. Strategic Influences (SWOT)
- III. Human Resources
- IV. Physical Resources (Space, Equipment, Technology)
- V. Service Assessment
- VI. Unit Strategic Priorities
- VII. Supporting Comparative/Benchmarking Data (External)

I. INTRODUCTION

Provide an overview of the unit describing services provided including any “innovative” features.

Mission Statement:

An expression of the Unit’s identity: “Who are we, what do we do, and for whom”.

Vision Statement:

An inspiring statement about the future of the Unit and the desired impact of the Unit’s work.

Values:

Brief statements about what is important to the Unit in terms of behavior, how people work and interact, and how the mission and vision are achieved.

II. STRATEGIC INFLUENCES

Provide an overview of the Unit highlighting strengths, weaknesses, opportunities and threats.

Strengths (Internal)

Recognized areas of excellence of the unit that relate to its mission – what you do well, are known for, have a competitive advantage in etc.

Weaknesses (Internal)

Areas for improvement that the unit must address to achieve its mission – gap in capacity, quality, resources, perception, areas of exposure preventing strategy implementation etc.

Opportunities (External)

Trends and changes from the perspective of opportunities that may exist – situation, either immediate or in the future that you can leverage.

Threats (External)

Trends and changes from the perspective of threats that may exist – situations, either immediate or in the future that may negatively impact your unit.

III. HUMAN RESOURCES AND ORGANIZATIONAL STRUCTURE

Provide staffing data and an assessment of staffing levels including an organization chart as well as any relevant benchmarking data.

Provide a confidential summary of staff development plans and potential retirements of key personnel over the next 5 years.

IV. PHYSICAL RESOURCES (SPACE, EQUIPMENT, TECHNOLOGY)

Describe physical resources (space, equipment, and technology) and how improvements would enhance the services provided.

V. SERVICE ASSESSMENT

Provide:

- A detailed assessment of the extent to which the Unit meets the needs and expectations of the University community;
- An assessment of how the unit works with external stakeholders eg. vendors, contractors, etc.
- An assessment of areas/services requiring improvement citing “best practices” as appropriate or applicable.

VI. UNIT STRATEGIC PRIORITIES

- List the key Unit strategic priorities which support the mission of the unit including action plans which would address the areas identified in V.
- If possible, indicate resource requirements to implement the strategic priority.
- Indicate performance target(s) that the Unit is striving to achieve.

VII. SUPPORTING BENCHMARKING DATA – EXTERNAL

Provide any available relevant comparative benchmarking data (from other institutions, organizations or associations) in support of your self-evaluation assessment.