

REVIEW OF ADMINISTRATIVE UNITS



805 TRU Way
Kamloops, BC V2C 0C8
tru.ca

POLICY NUMBER	ADM 29-0
APPROVAL DATE	September 26, 2018
AUTHORITY	President
CATEGORY	Administrative
PRIMARY CONTACT	Vice-President Administration and Finance
ADMINISTRATIVE CONTACT	(TBD)

POLICY

The University is committed to the efficient and effective operation of its **administrative units** and will review administrative units on a 5 to 7 year cycle. The review will reinforce the University's desire to optimize the overall performance of the University, while improving services to students, faculty, and staff, and the wider community. Administrative reviews can be initiated out of cycle at the request of the Board of Governors, the President or the Vice-Presidents. The coordination and oversight of the review process is the responsibility of the executive officer to whom the unit reports (the "Responsible Executive Officer").

DEFINITIONS:

Administrative Units include all departments of the University except for academic faculties. Examples include, but are not limited to: Finance, Human Resources, the Registrar's Office; Marketing and Communications, Information Technology Services, etc.

The **Executive** refers to the President or the Vice-Presidents.

REGULATIONS

Overview:

Consideration will be given to the business processes, service gaps and overlaps, resource requirements, self-study, and benchmark comparators. For example, the review will consider the following questions:

- Is the portfolio meeting its key accountabilities? Should they be narrowed or broadened?
- Who are the principle recipients of the Division's services (customers)?
- What is the perception of service and value for money from the customer's perspective?
- What process and evaluation methodology has the Division implemented to ensure continuous improvement?

- Has the Division identified universities or other related institutions who best demonstrate best practices within the appropriate service area?
- Has the Division developed and maintained quantitative benchmarks and do these benchmarks reflect best practices in the sector?
- Are the organizational structure, staffing complement, facilities, space, and other resources appropriate to support the Division, while considering the fiscal limitations of the University?
- What are the strengths and weaknesses of the Division?
- How does the Division compare to similar units provincially or nationally?
- What re-direction of resources would be required to make the Division more effective?
- What risks or barriers does the Division face when implementing change?

Recommendations for improving the portfolio or redirecting the function or services.

Review Process:

The Review Process includes the following steps:

- The University, under the direction of the Responsible Officer, will compile a Documentation Package of background information, including the Unit's self-study.
- The Responsible Officer will appoint a Review Panel, consisting of 3 reviewers; where possible these will include external reviewers with expertise related to the Unit under review. One of the external reviewers will usually be designated by the Responsible Officer as the Chair of the Review Panel and will be responsible for delivery of the Final Report.
- The Responsible Officer will provide the Documentation Package to the Review Panel, and will schedule an initial teleconference among the Review Panel members and the Responsible Officer to kick-off the process.
- The Responsible Officer will develop an itinerary of interviews with the Unit's key stakeholders and users in consultation with the Review Panel, with the first interview occurring no earlier than two weeks after the Review Panel has received the Documentation Package. The interviews will occur on campus and normally be completed within three (3) days. The itinerary will usually include interviews with:
 - o TRU Executive Officers
 - o AVP of the Division
 - o Dean/Director of the Division
 - o Recipients of services - participants representing a range of non-academic and academic staff who utilize the Unit's services .
 - o Any other relevant stakeholders

The Review Panel will provide a draft report to the relevant Executive Officer two to four weeks after the interviews are concluded.

Final Report:

The purpose of the Final Report is to inform the relevant Responsible Officer of findings of the Review Panel and any recommendations for improvement. The Review Panel should make essential, formal, prioritized recommendations that address its major findings. Opportunities for improvement will be categorized into “Quick Wins” (those that should be made promptly), those requiring further business case analyses, and those that are not viable at this time.

A response from the Unit lead will be provided within 2 weeks of the Final Report. The Responsible Officer and the Unit Lead will agree to an Implementation Plan that will set out the process for making “Quick Win” changes.

A summary of the Final Report, the Unit lead’s response, and the Implementation Plan will be shared with the staff of the Unit reviewed.