FY 2025 Budget Formulation Guidance – Support RCs

November 2023
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I. Executive Summary

Important dates to note for Support RCs:
- RCRPs are due on December 15, 2023
- SRR meetings with the SRCC will be scheduled between February 5, 2024, and February 16, 2024

What’s new this year:
To simplify and streamline the process this year, here are the major changes for FY 2025:
- Strategic Resource Review (SRR) meetings and primer meetings that provide an overview of the six Support RCs listed above will be combined into one meeting (they were separate meetings last year).
- RCs will be asked to quantify both completed and planned cost savings initiatives and efficiencies.
- Regarding operating and capital requests, given the ongoing development of the Plan for Pitt – Reimagined and the fact that we have been limited in what funding we have able award in the past, our primary focus for the will be on the following: addressing Responsibility Center Resource Proposals (RCRPs) from prior years, fulfilling existing commitments, and tackling critical operational, safety or compliance issues. To the extent that new priorities that emerge through Chancellor Gabel's process of refreshing the strategic plan we will reach out to relevant RCs as necessary.

The Budget ReSTART Support RCs Teams Channel for your RC will be the central repository for your RCRP submission (i.e., ReSTART statements, templates, etc.) as opposed to adding attachments to a field in PBCS as was done in the past.

Like the FY 2024 budget formulation process, the Support RC Committee (SRCC) will meet with six Support RCs each year on a rotating basis. Support RCs selected for SRR meetings in any given year will not be given any special advantage during the review of their Responsibility Center Resource Proposals (RCRPs). The RCRPs for all the Support RCs will be considered equally in the budget process. The following is the three-year schedule that was approved by the SRCC:

<table>
<thead>
<tr>
<th>FY 2025</th>
<th>FY 2026</th>
<th>FY 2027</th>
</tr>
</thead>
<tbody>
<tr>
<td>HR</td>
<td>Libraries</td>
<td>Facilities</td>
</tr>
<tr>
<td>SVC/Research</td>
<td>U CIS</td>
<td>PittIT</td>
</tr>
<tr>
<td>SVC/HS</td>
<td>Chancellor</td>
<td>PAE</td>
</tr>
<tr>
<td>Frederick Honors College</td>
<td>Public Safety</td>
<td>SVC/B&amp;B (RC86)</td>
</tr>
<tr>
<td>Office of University Counsel</td>
<td>Planning Design and Construction</td>
<td>SVC/Provost</td>
</tr>
<tr>
<td>Student Affairs</td>
<td>General University</td>
<td>SVC/CFO</td>
</tr>
</tbody>
</table>

The following is an overview of the budget timeline for Support RCs for FY 2025:

<table>
<thead>
<tr>
<th>Budget Formulation</th>
<th>Budget Execution</th>
</tr>
</thead>
<tbody>
<tr>
<td>Guidance released.</td>
<td>RCRPs are developed and submitted</td>
</tr>
<tr>
<td>December</td>
<td>Six selected Support RCs meet with SRCC</td>
</tr>
<tr>
<td>Early February</td>
<td>Review RCRPs and set University budget with shared governance</td>
</tr>
<tr>
<td>Mar - May</td>
<td>Board approves budget</td>
</tr>
<tr>
<td>June/July</td>
<td>Manage budget based on approved targets</td>
</tr>
<tr>
<td>July - June</td>
<td>Manage to Budget Targets throughout the fiscal year</td>
</tr>
</tbody>
</table>
II. FY 2025 Responsibility Center Resource Proposal (RCRP) Guidance for SUPPORT RCs

Prior to submission, RCRPs should be approved by RC leadership and reflect strategic priorities set by RC Planning and Budgeting Committees (PBCs) following the principles set in the Planning and Budgeting System. Support RCs are encouraged to utilize their PBCs, if established, or conduct a collaborative budget development process within their RCs.

All Support RCs should submit an RCRP including the items listed below. Each component includes instructions for your reference.

1. **Operating Budget Narrative**
   The following should be submitted as a part of your Operating Budget narrative (see Appendix 1 for template).

   *(1a) Five-Year Operating Budget Trend Chart*
   To assist the SRCC in understanding each Support RC’s operations, complete the chart template that has been provided on your Teams Channel. Instructions are included in the first tab of the template to provide more granular detail on how to address the following:
   - Report on entity 02 + 03 ending (June) budgets for FY20-FY23 and loaded (September) budget for FY24 (instructions include PBCS report to use to gather this data).
   - Note and be prepared to discuss and explain changes year to year.

   *(1b) Discussion of ReSTART results – FY 2023 Actuals and FY 2024 Budget*
   The ReSTART model income statements for FY 2023 Actuals and FY 2024 Budget will be provided to you through your RC’s Teams Channel. In the Operating Budget Narrative form, please describe your FY 2023 results and FY 2024 budget:
   - If your RC exceeded its targeted net margin and achieved a carryover in FY 2023:
     - What were the main drivers behind the favorable variance?
     - Are the results sustainable into FY 2024? Why or why not?
     - How will you use your FY 2023 carryover?
   - If your RC did not meet its targeted net margin:
     - What were the main drivers behind the unfavorable variance?
     - What is the RCs plan to improve in FY 2024?

   *(1c) Service Metrics (all Support RCs) and Key Takeaways from Service Level Surveys (six Support RCs with SRRs)*
   The Budget ReSTART model emphasizes the development of service metrics to ensure Support RCs are meeting the needs of the customers they serve. As a continuation of the discussion about service metrics from last year’s budget formulation process, all Support RCs are again asked to identify three to ten key service metrics that track services provided to other University RCs, students, employees, and community members. Please also provide targets the RC has set for itself and report on results to date.

   To streamline and build upon the metrics that were presented last year, you will find last year’s submission in your RC’s Teams Channel under the applicable folder. You can use last year’s to build from, or you can start a new set of metrics.
The discussion of service metrics should also consider the feedback received from the SRCC in the FY 2024 budget formulation process. For your convenience, that feedback is also found in your RC’s Teams Channel, in the applicable folder.

To better understand the services provided by the six Support RCs in this year’s SRR rotation, a survey was sent out to all RC leaders. The purpose of the survey is to provide context to the SRCC in assessing Support RC effectiveness and to provide feedback to Support RCs as they seek to improve service delivery. Responses are due November 10 and will be saved in the applicable Teams folder when they are available, and your RC’s Liaison will notify your DoA when it has been placed there. In the Operating Budget Narrative please explain the key takeaways from the survey responses.

(1d) Cost Savings Measures and Efficiency Initiatives
Focusing on cost efficiency and effectiveness is a long-standing practice of the University. Each year Pitt focuses on cost reduction efforts through a broad range of initiatives with the goal of efficiently providing services to support the education and research mission of the University.

A section of the Operating Budget Narrative form is available to explain your RC’s cost savings and efficiency efforts and to quantify the results/projected results. Please provide the following information for all initiatives implemented in FY22 and FY23, and also those planned for FY24 and FY25. Include all initiatives, even those with savings that were re-allocated to other priorities within your area.

- Brief description of initiative
- Year(s) of implementation
- Estimated permanent and one-time annual cost savings (or cost avoidance) amounts for each initiative.
  - This represents the amount of operating budget dollars saved or costs avoided by implementing the initiative.
  - Please include estimated dollar amount of savings on salaries and benefits if the number of employee FTE was impacted, as well as other operating expense savings.
- If the initiative resulted in a reduction to the amount of university owned or leased space needed by your RC, please provide a brief explanation including the reduction amount in square footage.
- If savings were re-allocated to other priorities in your area, please identify how the funds are now being used.
- Save any supporting documentation/analysis to Teams channel

(1e) Enterprise Risk Management (ERM) Assessment (if applicable)
If your RC has participated in the ERM Risk Assessment process, explain in the Operating Budget Narrative how the RC’s resources are used to mitigate the risks that were identified. A section of the Operating Budget Narrative form is available to document your explanation.

2. Strategic Operating Budget Requests (if applicable)
As noted earlier, given the ongoing development of the Plan for Pitt – Reimagined and the fact that we have been limited in what funding we have able award in the past, our primary focus will be on updating prior year requests, new self-funded requests, critical operational, safety or compliance issues, or revenue-supported requests. To the extent that new priorities that emerge through Chancellor Gabel’s process of refreshing the strategic plan we will reach out to relevant RCs as necessary.
This part of your submission should be made through the PBCS Project/Capital Intake forms in PBCS. Requests from the FY24 RCRP process that were either partially funded or not funded have been rolled forward in the Project/Capital Intake forms in PBCS. A user navigation guide for PBCS is available here and in your Teams folder.

Prior Year Operating Requests: RCs should review the requests that are in PBCS from the prior year and make any updates needed. If a prior year request is no longer needed, you may delete it. New requests should only be added in cases of clearly demonstrated urgency.

Self-funded or Revenue-Supported Requests: RCs should list any new strategic operating budget initiatives that are self-funded or revenue-supported and explain how they align with the University’s strategic objectives.

Within the Operating Budget Request forms in PBCS, on the Forced Ranking tab RCs should be sure to complete/update the Operating Requests Justification Narrative (field on the far right of the form) for all requests (2,000-character maximum; if more space is needed, save a file in your designated Teams folder clearly identified as the extension of the Justification Narrative):

- Describe any companion capital projects/funding that are needed as a pre-requisite for this program. On the New Budget Request tab, also indicate that there is an associated capital impact and whether those projects have been incorporated in the capital budget.
- Clearly distinguish between permanent and one-time requests. Also indicate as such on the New Budget Request and Funding Assumptions tabs.
- If self-funded, explain the RC internal funding that is being used to support the strategic initiative. If requesting new resources for urgent needs, explain why internal RC budget reallocations are not feasible.

3. Capital Budget Requests (if applicable)
As noted earlier, given the outlook for the FY 2025 budget, we will be focused on existing commitments and priorities. As such, this year’s process will mainly focus on updating prior year.

As a reminder, capital funding requests are for projects above $50,000 (regardless of the funding source) that advance RC and University priorities consistent with the Campus Master Plan. Requests below the specified threshold should be managed within each RC’s existing resources.

This part of your submission should be made through the PBCS Project/Capital Intake forms in PBCS. A user navigation guide is available at the link above.

Business and Operations developed a new Capital Project Prioritization Tool in FY23 to assist with ranking of projects with respect to alignment with various factors associated with the University’s mission. Use of this tool, located in the applicable folder in your Teams Channel, is strongly recommended when ranking all capital project requests and completed copies of the questionnaire should be included within your Teams folder.

The capital budget request narrative should be completed/updated within PBCS (Forced Ranking tab, Capital Requests Justification Narrative field to the far right) and should explain the following (2,000-character maximum; if more room is needed, save a file in your designated Teams folder clearly identified as the extension of the Justification Narrative):

- What is the proposed capital project(s) and how are they prioritized? Has the Capital Project Prioritization Tool been employed to assist with project ranking?
• What are the results of reviews by the Office of Planning, Design, and Construction (OPDC) and/or the Office of Facilities Management? Please comment on any formal studies completed. Also indicate on the New Budget Request – Capital tab if the project has been reviewed by OPDC.
• How was the cost of the project determined (also indicate on the New Budget Request – Capital tab), and what is the source of funding for the proposed projects?
• How, if approved, will the new capital project advance the Campus Master Plan?
• How does this capital project impact progress on critical programs that are essential to revenue generation or strategic objectives? Is this capital project needed as a pre-requisite for a particular program?
• Does the new capital project increase/decrease the need for permanent operating funds? If there is an associated operating request (for example, for operating costs for a new building), also indicate this on the New Budget Request – Capital tab.

4. **Strategic Advancement Fund (SAF) Requests (if applicable)**
The Strategic Advancement Fund (SAF) is intended to be self-sustaining to support one-time, non-capital loans for initiatives of at least $1 million (can be over multiple years) that advance the University of Pittsburgh’s mission and brand. SAF funding is primarily available for investments in academics, and research projects based on a business case that demonstrates a benefit to the University. Information on the SAF along with the new procedures for requesting SAF funding can be found on the CFO Partners SharePoint site. The template for SAF requests also can be found on the SharePoint site. SAF requests are strongly encouraged to be submitted during the budget formulation process in tandem with the RCRP. If submitting a SAF request, please include it in the materials submitted through your RC’s Teams channel.

5. **RCRP Completion Checklist**
RCs should submit the following components with their RCRP **by December 15, 2023**. Prior to submission, RCRPs must be approved by RC leadership.

Please see new file naming conventions to use when submitting documentation through the Teams Channel. Organizing detail into these folders utilizing the naming conventions will significantly cut down the time it takes for your Liaison to organize the data provided to them.

<table>
<thead>
<tr>
<th>RCRP Component</th>
<th>How to submit</th>
<th>File Name Convention Examples</th>
</tr>
</thead>
</table>
| Operating Budget Narrative Components | • Template in Teams folder  
• Save completed narrative in the same location | RCxx FY25 Operating Budget Narrative.docx |
| (1a) 5-Year Operating Budget Trend Chart | • Template in Teams folder  
• Paste image into narrative  
Can save supporting documentation (if needed) to Teams folder | RCxx Five Year Operating Budget Trend.xlsx |
| (1b) Discussion of ReSTART Results – FY23 Actual and FY24 Budget | • Included in narrative  
• Can save supporting documentation (if needed) to Teams folder | RCxx ReSTART Results Support.xxxx |
|   | (1c) Service Metrics and Takeaways from Service Level Survey | • Included in narrative  
• Prior year metrics and survey results (if applicable) are saved in Teams folder  
• Suggested metrics template in Appendix 2  
• Can save supporting documentation (if needed) to Teams folder | RCxx FY25 Service Metrics.xxxx |
|---|---|---|
|   | (1d) Cost Savings Measures and Efficiency Initiatives | • Included in narrative  
• Can save supporting documentation (if needed) to Teams folder | RCxx FY25 Cost Savings.xxxx |
|   | (1e) (Optional) ERM Assessment | • Included in narrative  
• Can save supporting documentation (if needed) to Teams folder | RCxx ERM Assessment Support.xxxx |
|   | (2) (Optional) Strategic Operating Budget Requests | • PBCS Project/Capital Intake form  
• Any additional supporting documentation (if needed) can be saved in the Teams folder | RCxx FY2x RCRP #Oxx Justification Narrative.docx  
If more than one file of supporting documentation is needed, create a folder for RCxx #Oxx and save files using the naming convention noted above. |
|   | (3) (Optional) Capital Budget Requests | • PBCS Project/Capital Intake forms  
• Capital Project Prioritization Tool – located in your Teams Channel  
• Any additional supporting documentation (if needed) can be saved in the Teams folder | RCxx FY2x RCRP #Cxx Justification Narrative.docx  
If more than one file of supporting documentation is needed, create a folder for RCxx #Cxx and save files using the naming convention noted above |
|   | (4) (Optional) Strategic Advancement Fund (SAF) Requests | • Complete SAF request template available on CFO SharePoint site (Funding for Strategic Initiatives tab) | RCxx FY2x SAF Request.pdf |
|   | Strategic Resource Review (SRR) Meeting Materials | How to submit | File Name Convention |
|   | Presentation for SRR meeting | • For the 6 Support RCs with an SRR scheduled, email to liaison 2 business days in advance of SRR meeting  
• See Appendix 3 for template  
• RCs that do not have an SRR meeting scheduled this year may also prepare and submit presentation materials for the SRCC’s review and consideration by January 5, 2024. This is optional and not required. | RCxx FY25 SRR Slides.ppt |
III. Strategic Resource Reviews (SRR)

The RC heads and their Directors of Administration or Business Managers from the six selected RCs for FY 2025 will be invited to an SRR meeting with the SRCC in early February. These SRR meetings will inform University leadership resource decision-making; however, no decisions will be made during these meetings.

Focus of the SRR Discussions

In preparation for these 90-minute SRR meetings (to include time to cover primer material), please prepare a PowerPoint presentation and structure the first approximately 45 minutes of the meeting to address the areas below so that there is time for discussion.

- **Primer**: Enables the SRCC to gain a better understanding of your RC:
  - Provide an overview of the RC’s budget, operations, and services.
  - Explain major strategic priorities of the RC and initiatives that align with the Plan for Pitt.
  - Explain activity drivers, objectives, initiatives, and service level demands that impact your RC’s budget.
  - Explain metrics used to measure progress on strategic priorities and service metrics used to gauge customer satisfaction.
  - Discuss the main takeaways from the survey responses that you received for your RC and what actions you plan to take to improve services.

- **Operating Budget**: Discuss your RC’s 5-year Operating Budget Trend and other key items to note regarding your budget.

- **ReSTART Results**: Discuss your RC’s FY 2023 ReSTART results and FY 2024 ReSTART budget – drivers behind exceeding or not meeting FY 2023 targeted net margin and plans to improve in FY 2024.

- **Cost Savings Measures and Efficiency Initiatives**: Discuss your RC’s efforts to contain costs and gain operating efficiencies.

- **Strategic Operating Budget Requests (if relevant)**: Describe any strategic initiatives that are self-funded, affect safety/compliance/operations or are revenue-supported and explain any updates to last year’s requests for resources. If any new requests are urgent, explain and justify.

- **Capital Requests (if relevant)**: Explain any requests for capital projects, with particular focus on existing commitments and priorities requested in previous years, as well as any plans to release space.

Appendix 3 includes additional detail and a template for the SRR meeting presentations. Please email your presentation to your liaison **two business days in advance of your RC’s scheduled SRR**. RCs that do not have an SRR meeting scheduled this year can also prepare and submit presentation materials for the SRCC’s review and consideration by January 5, 2024. This is optional and not required.
IV. Review and Approval Process

The following describes the review and approval of the RCRPs for both the operating and capital budgets:

Operating Budget

As noted earlier, the Support RC Committee (SRCC) has been established to review the RCRPs for the Support RCs. The purpose of the SRCC is to serve as an oversight committee with visibility into the University’s Support RC budgets. The committee will learn about each of the Support RC budgets, review opportunities to improve service delivery and utilization of Support RC resources and recommend budget levels that align with strategic priorities to the Executive Budget Committee (SVC/Provost, SVC/CFO, and SVC/Health Sciences). The three senior officers of the EBC will receive recommendations from the SRCC and recommend a university-wide budget to the Chancellor.

Prior to submission, RCRPs must be approved by RC leadership and reflect strategic priorities set by RC Planning and Budgeting Committees (PBCs) (if relevant). Once submitted, each RCRP will be reviewed by the SRCC.

Consistent with prior years, final recommendations on key parameters will be presented to the Chancellor in April 2024 through the University’s Planning and Budgeting Committee. Final resource decisions will be affirmed after the Board of Trustees approves the budget.

After the FY 2025 budget load is complete, Support RCs will receive their FY 2025 ReSTART target budgets. RCs will be expected to manage to their approved ReSTART target budgets and internally fund any needs that arise during the fiscal year. Support RCs that do not meet their budget target at the end of the fiscal year will be required to submit an explanation and remediation plans and meet with the CFO’s office.

After the conclusion of FY 2025, RCs will be able to carryover a portion of the surplus above their approved targeted net margin into FY 2026. See carryover and budget target procedures for details.

Capital Budget

In addition to inclusion in the RCRP submission, capital project requests are subject to the following approval processes, which should be completed prior to submission, if possible:

- New construction and renovation projects valued at over $5 million require stage-gate approval through the Capital Projects Review Board (CPRB) and ultimately the Property and Facilities Committee of the Board of Trustees.
- Projects valued between $2 million and $5 million require approval via a decision memo through the department’s SVC, with approval by the SVC/CFO and SVC Business and Operations. The Property and Facilities Committee is also informed of these projects.
- Requests for new construction projects valued at over $5 million should be submitted through the RC’s Senior Vice Chancellor’s office via draft decision memo describing the mission need for the project. With the support of the applicable SVC, the project will then be presented by the SVC or their designee at a regularly scheduled meeting of the Capital Projects Review Board at the Critical Decision – 0 (CD-0) level. If supported by the CPRB, the decision memo will be forwarded to the Chancellor for approval to proceed with an initial study.
• Capital renovation projects should be submitted in advance of the RCRP submission through the Office of Facilities Management’s departmental work request process. Requests will be assigned to the Office of Planning, Design, and Construction for initial review and discussion with the requesting RC or department, and an initial order of magnitude cost estimate will be developed. For projects expected to exceed $5 million in value, SVC support should be sought, and the project should then be submitted through the CPRB CD-0 decision memo process as described above. This will allow the department to ensure senior leadership support and identify approximate funding requirements prior to RCRP submission.

• Major capital project submissions will be reviewed to determine whether they are included in the University’s 5-year Capital Plan and/or support the Campus Master Plan/Institutional Master Plan.

• Projects submitted through the RCRP process will be evaluated for inclusion in the University’s annual Capital Budget, which must be recommended by the Capital Projects Review Board and approved by the Executive and Budget Committees of the Board of Trustees.
V. Additional Resources

Additional Information and Guidance can be found on the SVC/CFO Partners SharePoint site, which has been developed as a one-stop location for communication and guidance on the Budget Formulation Process and the new Budget ReSTART Model.

Planning and Budgeting Cloud Solution (PBCS): An instruction manual for using PBCS to submit RCRPs will be available on the SVC/CFO Partners SharePoint site at FY 2025 Budget Formulation PBCS User Guide. A copy is also available in each RC’s Teams channel.

Training: Budget formulation orientation and trainings are available on the SVC/CFO’s Partners SharePoint site. Orientation can be found under the FY 2024 Resources; training is available under the Budget Formulation Guidance Training.

Other Questions? Please email: rcrphelp@pitt.edu

VI. REFERENCE TERMS

Support RC Committee (SRCC): The launch of Budget ReSTART required the creation of a new oversight mechanism referred to as the SRCC, which is tasked with understanding Support RC budgets and reviewing opportunities to improve service delivery and the utilization of Support RC resources. The SRCC also will be recommending Support RC requests that align with strategic priorities to the Executive Budget Committee (EBC) as part of the annual budget process.

Budget ReSTART: (Revenue Sharing to Accelerate Responsive Transformation) Model. This model is designed to empower the University’s Responsibility Centers (RCs) as they understand their operations best and will continue to be utilized in FY 2025 and beyond. Further, it gives RCs incentives to generate revenue, achieve cost efficiencies and support strategic initiatives within the schools while encouraging collaboration on research.
Appendix 1:
Operating Budget Narrative Form – Support RCs

The form below should be completed for the operating budget narrative and should be submitted in your Teams Channel. A downloadable version of the form is available [here](#) and a copy is available in each RC’s Teams channel.

<table>
<thead>
<tr>
<th>Five-Year Operating Budget Trend Graph</th>
</tr>
</thead>
<tbody>
<tr>
<td>✓ See graph template and instructions in your Teams folder</td>
</tr>
<tr>
<td>✓ Explain any significant changes</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Discussion of FY 2023 ReSTART Results and FY 2024 ReSTART Budget:</th>
</tr>
</thead>
<tbody>
<tr>
<td>✓ Main drivers behind meeting or not meeting FY 2023 target for Operating Margin</td>
</tr>
<tr>
<td>✓ FY 2023 Surplus – is it sustainable into FY 2024 – why or why not? Plans to use your carryover? Plans to improve performance in FY 2024?</td>
</tr>
<tr>
<td>✓ FY 2023 Deficit – plans to improve in FY 2024</td>
</tr>
</tbody>
</table>

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<thead>
<tr>
<th>Service Metrics and Takeaways from Customer Service Survey</th>
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</thead>
<tbody>
<tr>
<td>✓ Please provide information on your RCs key service metrics, your targets, and your progress in meeting them (all Support RCs)</td>
</tr>
<tr>
<td>✓ Please provide a discussion of the key takeaways from the results of the recent Service Level Survey (six Support RCs in the SRR rotation for this year)</td>
</tr>
</tbody>
</table>
Cost saving measures and efficiency initiatives:

- Please provide the following information for all initiatives implemented in FY22 and FY23 and also those planned for FY24 and FY25. Include all initiatives, even those with savings that were reallocated to other priorities within your area.

<table>
<thead>
<tr>
<th>Brief description of initiative</th>
<th>Year Implemented</th>
<th>$ amount of cost savings (or cost avoidance) Please note both the fiscal year as well as whether the savings were permanent or one-time</th>
<th>If the initiative resulted in a reduction of space, please note the square footage and whether the space was university-owned or leased</th>
<th>Briefly describe how the savings were utilized</th>
</tr>
</thead>
<tbody>
<tr>
<td>Example: Initiative A ~ savings related to not renewing lease for Physics lab</td>
<td>2022 FY22 FY23</td>
<td>$100K $50K One-Time Permanent 5,000 SQ FT Leased</td>
<td>Savings reallocated to fund new staff positions</td>
<td></td>
</tr>
<tr>
<td>Initiative B</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Initiative C</td>
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<tr>
<td>Initiative D</td>
<td></td>
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</tbody>
</table>

Enterprise Risk Management (ERM) Assessment

- If your RC has participated in the ERM Assessment, explain how your RC’s resources are used to mitigate the risks that were identified.
Appendix 2: Service Metrics Template

The template below is a guide for each service metric identified.

<table>
<thead>
<tr>
<th>Required Information</th>
<th>Instructions</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Metric Identification</strong></td>
<td></td>
</tr>
<tr>
<td><strong>Metric</strong></td>
<td>The metric language should be concise and very clear about what exactly is being counted or measured and should spell out acronyms.</td>
</tr>
<tr>
<td><strong>Definition</strong></td>
<td>The definition explains how you will calculate the data collected to measure the change expected. Clarify everything the users need to know to understand how to use this metric.</td>
</tr>
<tr>
<td><strong>Linkage to Long-Term Outcomes</strong></td>
<td>Briefly describe the relationship of the metric to the desired long-term outcome or impact it supports. Answers might describe the metric’s role in the underlying theory of change or why the metric represents a good proxy of progress toward desired goals.</td>
</tr>
</tbody>
</table>
| **Reporting Type** | Specify one of the following units of reporting for this metric:  
  • Number  
  • Percent  
  • Date (for milestones) (specify month or quarter and year)  
  For metrics that require a qualitative response, provide very specific instructions for the desired response and keep the response brief. |
| **Use of Metric** | Briefly describe how this metric will be used to monitor progress in achieving program goals and objectives. |
| **Reporting Frequency** | Frequency for reporting results and setting targets (i.e., quarterly, annually, every two/three/etc. years) |
| **Data Source** | To track progress and properly set baselines and targets, data will need to be collected. Specify how and when data will be generated in practical terms. Include  
  • the specific acceptable method(s) by which data for this metric are/will/should be collected  
  • the date(s) by which data will be available  
  • the data collection tools that will be used  
  • where (i.e., system, unit) the data will reside or be captured |
| **Metric Business Owner** | The unit responsible for defining the metric. |
| **Metric Reporting Owner** | The unit responsible for collecting and reporting on the data. (May or may not be the same as the Metric Business Owner) |
| **Disaggregate(s)** | To disaggregate data means to break it down by subgroups (e.g., gender, age, race, school, funding source). |
| **Setting Targets** | |
| **Target** | Specify a target goal for the metric and the time period. |
| **Reporting Results** | |
| **Results** | Include the most recent results and date of last collection. |
### Appendix 3:  
**SRR Meeting Presentation Template**

*Use the following to develop a PowerPoint for your SRR presentation.*  
For SRR presentations, please include at least one slide for each of the following topics:

<p>| | |</p>
<table>
<thead>
<tr>
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<tbody>
<tr>
<td><strong>1 - Primer</strong></td>
<td><strong>2 - Primer</strong></td>
</tr>
<tr>
<td>Provide an overview of the RC’s budget, operations and services.</td>
<td>Explain major strategic priorities and initiatives of the RC.</td>
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<tr>
<td><strong>3 - Primer</strong></td>
<td><strong>4 - Primer</strong></td>
</tr>
<tr>
<td>Explain activity drivers, objectives, initiatives, and service level demands that impact your RC’s budget.</td>
<td>Explain metrics used to measure progress on strategic priorities and service metrics used to gauge customer satisfaction. Discuss the main takeaways from the survey responses that you received for your RC and what actions you plan to take to improve services.</td>
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<tr>
<td><strong>5 - Operating Budget</strong></td>
<td><strong>6 - ReSTART Results</strong></td>
</tr>
<tr>
<td>Provide a five-year historical overview/trend for your RC’s budget. Explain any changes/reallocations that your RC is proposing for FY 2025.</td>
<td>Discuss the FY 2023 results and FY 2024 budget based on your income statements. Discuss main drivers of favorable (carryover) or unfavorable variance.</td>
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<tr>
<td><strong>7 - Cost Savings Measures &amp; Efficiency Initiatives</strong></td>
<td><strong>8 - Strategic Operating Budget Requests (if applicable)</strong></td>
</tr>
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</table>
| Describe any cost savings measures that were implemented in FY22 and FY23 and also those planned for FY24 and FY25. Include all initiatives, even those with savings that were re-allocated to other priorities within your area. Please include the following details:  
- Brief description of initiative  
- Annual cost savings amount  
- Year of implementation | Describe any strategic initiatives that are self-funded or revenue-supported. Explain any updates to prior year requests. Explain and justify urgency of any new requests for resources. Clearly distinguish Permanent from One-Time requests. |

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<td><strong>9 - Capital Requests</strong></td>
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<tr>
<td>Explain any requests for capital projects and how they impact progress on critical programs that are essential to revenue generation or strategic objectives. Discuss any plans to release space.</td>
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