



## University of Southern Queensland

### USQ PLAN TEMPLATES

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Please note that the following templates are preliminary only and are subject to feedback from reviews of the annual Planning Framework. This document lists the scopes within the Strategic Plan and definitions for each.

# 1 Five Year plans

## 1.1 Enterprise Strategic Plan

<b>Vision</b>	A <i>Vision statement</i> outlines the aspirations of an organisation. It concentrates on the future and provides clear decision-making criteria
<b>Mission</b>	A <i>Mission statement</i> expresses the fundamental purpose of the organization. It focuses on the present and defines the customer and the critical processes. It articulates the desired level of performance
<b>Core Values</b>	<i>Core Values</i> describe the essential organisational philosophy and are a declaration of the principles which inform all the dealings of the organisation.
<b>Principal Community Contribution</b>	<i>Principal Community Contribution</i> is a statement of the core contribution the organisation provides in harnessing the capacity of the diverse university community to work towards the fulfilment of its vision and mission reflecting the values and expectations of those in its communities
<b>Competitive Business Advantage</b>	The <i>Competitive Business Advantage</i> is derived from a fundamental examination of business through the analysis of its financial statements and health, its management and competitive advantages
<b>Organisational Themes</b>	<i>Organisational Themes</i> include Vision building, or the capacity to develop a shared vision of what the organisation and its change should look like. When this shared purpose is present, organisations are better able to build consensus and credibility through the use of symbols, public dialogue, and the example of those for whom the change makes sense.
<b>Key Organisational Goals</b>	<i>Goals</i> are descriptions of what is planned to achieve. They describe states of affairs rather than functions. They are broadly stated and identify the main functions of an organisation (for example, the primary university functions of teaching, research, and the award of qualifications, and the maintenance of functions such as financial control and the management of resources).
<b>Priority Objectives and Corporate Strategies</b>	<i>Corporate Objectives</i> are operational statements written in terms which make it evident when they have been achieved. As with goals, they are descriptions of position rather than an action. They are descriptions of a desirable future state. A <i>Corporate Strategy</i> is a plan of action designed to achieve a particular goal objective. Objectives and strategies should be developed using the SMART principle: <b>S</b> pecific; <b>M</b> easurable; <b>A</b> ttainable; <b>R</b> ealistic; <b>T</b> imely
<b>Performance Forecasts and Targets</b>	<i>Key Performance Indicators</i> (KPI) are financial and non-financial metrics used to help an organization define and measure progress toward organizational goals. KPIs are descriptions of the achievement of organisational goal objectives. <i>Targets</i> are the sought after value of the performance indicator established by the steward for an objective
<b>Investment Plan</b>	An <i>Investment Plan</i> meets the requirements identified in the Financial Administration and Audit Act 1977 and the Financial Management Standard 1997, including compliance with applicable Australian Accounting Standards. The Plan is subject to independent audit by the Auditor-General and QAO authorised auditors.
<b>Risk Profile</b>	<i>Risk Profile</i> : Quality is not an arbitrary or fixed indicator and must be moderated in the context of the risks confronting the organisation and the resources available to respond to those risks. The organisational risk profile is compiled from risks identified in planning cycles, organisational reviews and external audits
<b>Implementation of this Plan</b>	The management framework to be employed for <i>implementing this plan</i> is based on a combination of the organisational structure, the quality framework and the performance management and reporting arrangements through: Organisational and Planning Structure Performance Management and Reporting Arrangements Key roles Staff Engagement Framework

Monitoring and reporting on the achievement of Corporate Performance Targets, Key Organisational Theme Projects and Issues of Strategic Importance will be through the Vice-Chancellor's Committee and to USQ Council.

## 1.2 Five Year Goal Plan

<b>Goal Statement</b>	A description of a main function (goal) of the university which is aligned to its vision, values and mission statements and the institution's defined organisational themes. <i>(Reference definition of Key Organisational Goal)</i>
<b>Objectives</b>	Related to one or more goals and the objective indicates the particular emphasis for USQ in achieving a goal. Each objective can be regarded as an output which is likely to have one or more strategies associated with it. An objective may have an agreed USQ wide strategy or it may be that sections prepare their own strategy responses. An objective may be a priority objective in any one year and if so, it will have an agreed USQ wide strategy. <i>(Reference definition of Objectives)</i>
<b>Performance - Past</b>	Aligned with Biannual Strategic Alignment Report to USQ Council
<b>Performance - Future</b>	Key Future Issues (at least five) for your goal area, with principal activities and key performance indicators
<b>Risk</b>	Risk from each of the principal activities in goal area. Provide top three – five major risks confronting its operation. <i>(Reference definition of Risk Profile)</i>
<b>Assurance</b>	<ul style="list-style-type: none"> <li>▪ Compliance – links with Legislation/Regulations</li> <li>▪ Internal Audit and Review - aligns with the USQ Internal Audit Plan</li> <li>▪ Policy Framework – aligns with policy framework for goal area</li> </ul>
<b>Goal Strategies</b>	Identify five strategies or actions for the goal area to respond to the major risks and business issues confronting the university <i>(Reference definition of Strategy)</i>
<b>Additional Requirements</b>	Requirements: List major requirements which require action outside the goal area which will impact on the goal over the next five year period.

Monitoring and reporting on Key Organisational Goal Plan Strategies, Key Performance Indicators and Targets will be through Biannual Strategic Alignment Reports to the Vice-Chancellor's Committee and to USQ Council.

### 1.3 Five Year Section Plan

<p><b>Performance</b></p>	<p>Past Performance: lists Key Performance Indicator; Actual Result and Comment. Links to the Strategic Alignment Report to reference KPIs.</p> <p>Future Issues: Identify five future issues for the section and select the KPI most relevant to the issue</p> <p>Future Performance: Select the five indicators most important to the section. Give the KPIs a priority ranking and indicate performance in 3 years and then the following two years</p>
<p><b>Strategising</b> (Reference 6.1.1 for definition of Objectives and Strategy)</p>	<p>Risks: Build on the section’s existing risk assessment to identify the 3-5 major risks confronting the operation of the section. Risk Reference must align with Section Strategies and Requirements</p> <p>Section Strategies: Identify up to five strategies required to be initiated by the section to respond to major risks and business issues confronting the section.</p> <p>Requirements: List major requirements which require action outside the section which will impact on the goal over the next five year period.</p> <p>USQ Corporate Strategies: Complete information for all corporate strategies. Linked to USQ Priority Objectives and Corporate Strategies. It is mandatory for the section to complete action against each of these priorities</p>
<p><b>Student Projections:</b></p>	<p>Faculty Load Planning Templates – Commencement and Retention Histories; Variations from Planned Load and Summary estimates of Faculty Course Load (approximated on Faculty/Program historic course load distributions) for Commonwealth funded program load.</p> <p>The data will support Faculty negotiations regarding expected commencement volumes with marketing and to identify projected international enrolments. Faculties are provided guidance on planning accuracy in the planning timeframe with early approximations of load outcomes for ensuing years.</p>
<p><b>Staff Projections</b> <b>Cost and Revenue Projections</b></p>	<p>Provides Faculties and Departments a consistent and current model in which to plan and forecast future salaries. The model is to be used in conjunction with any budget allocation planning and should reconcile with PeopleSoft budget (uploaded) spreadsheets.</p> <p>Templates include departmental budget salaries; employee data; 5 year forecasts; operational and resource management plan tables; and a salary reconciler supported by reference data</p>
<p><b>Faculty Program Portfolio Plan</b></p>	<p>Triennial plan listing proposed new programs; programs on offer; programs to be discontinued; major changes to program portfolio e.g. additions of new majors. Will be informed by the Annual Faculty Academic Quality Reports.</p>

Information from Sectional Five Year Plans is consolidated into the Operational and Resource Management Plan (ORMP). Monitoring and reporting on Sectional Five Year Plans is through oversight of the ORMP by the Budget Management Committee and the Vice-Chancellor’s Committee.

## 2 *Special Purpose Plans*

Special Purpose Plans are informed by the Strategic Plan.

Asset Strategic Plan	Group Manager, Facilities
Corporate Communications	Director, Corporate Communications
Finance	Group Manager, Finance & Facilities
HR	Group Manager, HR
ICT Resources Strategic Plan	Chief Technology Officer
Marketing	Chief Marketing Officer
Quality	Group Manager, Sustainable Business Management & Improvement

Special Purpose Plans are developed by the responsible manager and contain, in addition to any regulatory requirements (refer Section 6.1. above), the following:

- A description of the core elements
- A clear indication of how each element impacts on the USQ strategic plan and each of its goals
- The efficiency measures required to be implemented for each element if USQ is to achieve its strategic plan projections
- The effectiveness measures required to be implemented for each element
- An impact statement in regard to the student and staff projections of USQ
- A projection of costs for each year and targets for each year
- Any other elements required to meet FMS or IAF requirements.

USQ will incorporate its strategic plan requirements into these core plans. This does not preclude specific and important processes and sub processes becoming part of these core plans.

Monitoring and reporting on Special Purpose Plans is through Strategic Plan implementation processes.

### 3 One Year plans

#### 3.1 Enterprise Operational Plan

Consolidated information from organisational section operational plans as set out below

#### 3.2 Organisational Section Operational Plan

The Operational and Resource Management Plan will contain consolidated information from **Organisational Section Plans** as set out below.

<b>Past Performance</b>	Key Performance Indicators; Actual Result and Comment.
<b>Future Issues</b>	Key Performance Indicators; Issue and Comment.
<b>Future Performance</b>	Key Performance Indicators; Priorities; First 3 Years; Following 2 Years
<b>Risks</b>	Risk Reference; Description; Sub-Process most Related; Cause Likelihood; Consequence; Risk Rating
<b>Section Strategies</b>	Risk Reference; Strategy; Project Manager; Date for Plan
<b>Requirements</b>	Risk Reference; Additional Requirement; Likely Cost; Section to Respond
<b>Corporate Strategies</b>	Corporate Strategy; Project Manager
<b>Operations</b>	
	Planned Load [EFTSL] by Funding Source
	DEEWR Commonwealth Grants Scheme Load [EFTSL]
<b>Finance</b>	
	Revenue
	Expenses
	Gross Surplus
	Net Surplus/Deficit
<b>Staff</b>	
	Package
	Academic Staff
	General Staff
	Total

Monitoring and reporting on the achievement of strategies and targets identified in Operational and Resource Management Planning is quarterly and through the Budget Management Committee and the Vice-Chancellor's Committee