MEMORANDUM

To:	Divisional Vice-Presidents, Deans, AVPs
Cc:	EOs, SEOs, Sonia Pettinella, Director, Integrated Resource Planning
From:	Margaret Kierylo, AVP Institutional Planning and Chief Data Officer
Date:	July 15, 2022
Subject:	2022-23 Integrated Resource Planning Cycle

The Office of Institutional Planning and Analysis (OIPA) is pleased to provide planners with information to assist with the 2022-23 Integrated Resource (IR) Plan submission and evaluations. IR Plans are due on September 1, 2022.

For planners who are new to York University or new in their role, the University Academic Plan (UAP) is the Senate-approved plan that sets out our institutional vision. It both informs, and is informed by, local level aspirations and plans.

IR Plans are multi-year operational plans that set out the objectives and actions for realizing local level plans *aligned with the UAP priorities*. Our commitment to strengthening our impact on the 17 United Nations Sustainable Development Goals (UN SDGs) also informs our IR Plans. PVP also has a pan-University IR Plan comprised of key institutional objectives and actions that are intended to support Divisional, Faculty and unit-level plans and coordinate efforts across the University in realizing the UAP.

As noted in the memo from the President and Provost, IR Plans provide the basis for budget submissions and support on-going evaluation and reporting of progress at York University. The goals listed in your IR Plan should consist of efforts that, when accomplished, move York University closer to its vision.

Additional objectives, strategies, or measures of success can be added as required in each year of the 2020-2025 UAP planning cycle. Planners can also delete content and/or priorities if initiatives that were completed in 2021-2022 are no longer applicable to their 2022-2023 IR Plan. For any initiatives that are not easily captured under a single UAP priority, OIPA recommends using the "Planning Context" field in the Framework Section of the IRP template.

2022-23 IR Planning Improvements and Resources

This year we have evolved the IR Planning Framework, incorporating several changes to facilitate a more seamless planning experience. The resources below can be found on the Integrated Resource Planning website and are accessible through a Passport York account:

1. UAP 2020-2025 Priorities and Initiatives Summarized.
2. An evaluated 2021-2022 PVP IRP. While PVP will be updating its IR Plan, the 2021-2022 PVP IRP is available as a resource.
3. A link to the SDG webpage is provided to illustrate how York University is contributing to the United Nations Sustainable Development Goals.
4. A high-level mapping (e.g., examples) to the SDGs is included to provide a broad frame of reference for planners, and to assist with aligning local level initiatives to SDG-related actions/strategies.
5. Sharing of York's *Measuring Success Report* (Institutional Dashboard) which outlines our collective successes for 2021-22 to enhance the use of assessment and evaluation data as we plan for 2022-23.
6. Updated SMA3 Scorecard that includes Year 1 and 2 results, and Year 3 target setting.
7. Guidelines for developing metrics, milestones, outputs, and outcomes (provided below).
8. Instructions on how to upgrade/install InfoPath 2013

Please note that as part of the ongoing efforts to promote service excellence across the organization, OIPA is planning to replace the existing InfoPath tool with a new IRP Interface by May 2024.

These resources can be found on the Planner Resources page:
https://irpplans.info.yorku.ca/2022-2023-irp-planner-resources/

United Nations Sustainable Development Goals (UN SDGs)

York's SDG Challenge is a pan-University exercise to strengthen our impact on the UN Sustainable Development Goals (SDGs) which call on all nations to take urgent action in seventeen areas that are critical to ensure peace and prosperity for people and the planet. To learn how York University is contributing to the United Nations Sustainable Development Goals, please visit: UN Sustainable Development Goals (UNSDGs) at YorkU.

In the 2021-2022 planning year we invited planners to include an "SDG" tag on any initiatives that contribute to the University's collective efforts to advance the 17 United Nations Sustainable Development Goals. Please continue to align your efforts with the SDGs. A high-level mapping to the SDGs is available on the resources page to provide a broad frame of reference for planners, and to assist with tagging of SDG-related actions/strategies. If you require assistance linking local-level strategies to the appropriate SDG(s), please connect with OIPA at OIPA@yorku.ca.

SMA3 2020-2025 Performance Scorecard

Institutionally, the [Strategic Mandate Agreement (SMA) 3](#) metrics will continue to be monitored in our 2020-2025 IR planning cycle as one relevant suite of indicators that overlap in many respects with our [University Academic Plan (UAP) 2020-25](#) measures of progress. SMA3 metrics are tracked over the course of the SMA3 2020-25 period and will be reported annually to the Ministry of Colleges and Universities. The institutional SMA3 metric scorecard is provided as a reference, and Faculty-level SMA3 metric data will be circulated to support planners in developing or updating their Divisional/Faculty/Unit IR plan. Planners will also develop their own metrics, milestones, and expected outputs and outcomes as appropriate.

A Guide to Developing Metrics, Milestones, Outputs, and Outcomes

As a community, we need to continue to systematize monitoring and evaluation of our plans and activities to assess how well we are progressing toward our goals. Clarifying our expected outcomes and evaluating our success in their achievement are important for tracking our progress in-year and over time. There are a variety of benchmarks that can be used to help assess progress toward achieving goals. Listed below are examples of measures of success to assist planners with evaluating their plans of action:

- **Metrics:** Metrics are measures of quantitative assessment commonly used to track, monitor, and assess the effectiveness of an objective, initiative, or plan. It is important to use performance-oriented metrics (e.g., increase student retention rate).
- **Milestones:** A specific point within a project/initiative used to measure the progress toward the goal (e.g., kick-off of a project, systemization of a process).
- **Outputs:** An output is defined as the act of producing something. Here you can list the services or products provided by your unit or faculty (e.g., a unique product, service, or result created by a project).
- **Outcomes:** A result from the implementation of a plan or any of its components. This could include your impact on the external environmental or the value you provide through your services or products (e.g., Service Excellence Project; or additional scholarship funding provided to support access for diverse students).

Metrics, milestones, outcomes, and outputs should be included in your IR Plan. You will be assessing your progress on these metrics, milestones, outputs, and outcomes in December as part of the mid-year evaluation.

Supporting the President and Vice-Presidents' IRP Process

In late Fall, OIPA will be reaching out to you with a reminder to complete the mid-year evaluation of your IR Plan. The evaluation process is our primary mechanism

for capturing initiatives and achievements as they progress. Evaluations should be succinct and include updates on your metrics, milestones, outputs, and outcomes.

We would like to encourage planners to continue to reference the respective PVP IRP objectives and strategies (e.g., strategy number) in their IR Plans. Referencing connections supports the IRP process and contributes to our annual evaluation and Board reporting process.

Template

The University's IR Planning process uses Microsoft InfoPath to document and submit electronic forms containing Divisional/Faculty and Unit IR Planning information. To access the 2022-23 InfoPath Template, planners will be required to have InfoPath 2013 installed on their desktop. See instructions on how to upgrade/install InfoPath 2013 through the Microsoft Office 365 web-based portal on the IRP Website.

Timelines

2022-23 IR Plan InfoPath templates will be distributed to planners the week of **July 25th, 2022**. To facilitate the development of IR Plans, the template has been pre-populated with last year's final IR Plan submissions.

The associated timelines for the 2022-23 IR Planning period are provided below:

Week of July 25th, 2022	• 2022-23 IR Plan prepopulated InfoPath templates distributed to planners. • Faculty-level SMA3 Scorecard distributed to planners.
September 1, 2022	• 2022-23 IR Plans **submission** due and uploaded to the database.
December 9, 2022	• 2022-23 IR Plans **mid-year** evaluation submission due and uploaded to the database.
April 1, 2023	• 2022-23 IR Plans **annual evaluation** submission due and uploaded to the database.

Planner Support

If you require assistance or support with the IR Planning process, please contact the Office of Institutional Planning and Analysis at OIPA@yorku.ca to review your planning needs. Suggestions for IR process improvement can be directed to me at mkierylo@yorku.ca.