Discussion Topics

Huron is pleased to partner with UNH on this important resource assessment initiative and proposes the following goals for today’s conversation:

1. Introduce UNH Steering Committee and Huron team
2. Discuss Huron’s approach to financial review and resource assessment
3. Address stakeholder engagement
4. Open discussion
5. Concluding thoughts
6. Determine next steps
Huron Project Team

Huron’s core team includes eight team members, though we plan to leverage additional team members and subject matter experts as needed.

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UNH Steering Committee

Huron is pleased to partner with UNH Steering Committee under the executive sponsorship of President James Dean and Provost Wayne Jones:

Executive Team

- Wayne Jones, Provost
- Chris Clement, COO
- Cathy Provencher, Interim CFO
- P. Vasudevan, Senior Vice Provost
- Bill Poirier, CIO
- Debbie Dutton, VP for Advancement
- Scott Olinger, Faculty Senate, COLSA

Revenue and Expenses Team

- Deborah Merrill-Sands, Paul
- Louise Griffin, Research
- Amy Wack, BSC
- David May, OBA
- Betty Schmid, OS Representative
- Alexandra Padilla, Graduate Student

Academic Program Costs Team

- Michelle Dillon, COLA
- Sarah Connor, Provost Office
- David Matta, BSC
- Anne Broussard, HHS and ASAC
- Karen Graham, CEPS
- Ethan McClanahan, Undergraduate Student

Data Support Team

- Kerry Scala
- Jackie Snow
Understanding of Your Needs

Huron understands UNH recently announced *The Future of UNH* strategic initiatives which together position the University to reach the top 25 universities among a set of the most important measures of academic performance.

- Support UNH in achieving the **four strategic priorities** of UNH: student success, academic excellence, and embracing New Hampshire, with a focus on building financial strength

- Identify a **menu of opportunities** to provide revenue enhancement and cost reductions across the institution to improve efficiency and effectiveness

- Conduct an evaluation and **quantification of the benefits**, implementation cost, timelines, and resources required

- Provide recommendations that are implementable and closely aligned to the institutional mission
About Huron

Huron understands the culture of higher education and the need for customized solutions to meet the needs of UNH in this important financial review and resource assessment.

- Worked with more than **500 institutions**, including all **top 100 research universities**
- Conducted over **7,000 successful engagements**
- Professionals dedicated to providing professional services and solutions for the industry for more than **25 years**
- Work that spans the gamut of higher education operations; we understand the **dynamics and interrelations**
- Understanding of the participative nature of higher education and the need to **engage stakeholders** throughout the process
Project Timeline Overview

The project will follow a four-task, twelve-week engagement with checkpoints for deliverables and Steering Committee feedback.

<table>
<thead>
<tr>
<th>Project Tasks</th>
<th>Dates</th>
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<tbody>
<tr>
<td>Task 1 - Project Initiation</td>
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<td>Task 2 - Opportunity Identification</td>
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<tr>
<td>Task 3 - Hypothesis Development and Testing</td>
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<td>Task 4 - Solution Development</td>
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Other stakeholder groups to participate in project meetings include the Deans’ Council, Cabinet, Academic Standards Advising Committee, Faculty Senate, Budgeting and Financial Planning Group.
Approach to Resource Assessment

Huron structures our administrative resource assessment projects to fit the unique needs of each client; however, our extensive experience with performance improvement is informed and guided by a similar phased format.

**Project Initiation**
- Assemble a steering committee to oversee the project
- Conduct kick-off meeting
- Confirm project scope, approach, work plan, and deliverables
- Review the data and interview request list

**Opportunity Identification**
- Conduct a diagnostic assessment of institutional and financial trends
- Conduct stakeholder interviews
- Review requested data and documents
- Benchmarking assessment

**Hypothesis Development and Testing**
- Finalize prioritization criteria
- Develop supporting analytics
- Prioritize opportunities
- Steering Committee opportunity selection

**Solution Development**
- Business case development
- Build roadmap for selected opportunities
- Evaluate initial opportunity prioritization

**Deliverables**
- Data list
- Interview list
- Steering Committee kick-off presentation

**Deliverables**
- Financial trends analysis
- Operational profile
- Themes and observations

**Deliverables**
- Opportunity menu
- Prioritized list and observations of highest potential opportunities

**Deliverables**
- Business cases for identified highest priority opportunities
- Implementation roadmap
- Report
## Initial Project Scope

Based on initial discussions with UNH and Huron’s experience conducting similar reviews at other institutions, we have recommended the following eighteen (18) focus areas for our initial phase of work.

<table>
<thead>
<tr>
<th>Project Focus Areas</th>
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<tbody>
<tr>
<td>• Academic Auxiliaries</td>
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<td>• Academic Structure</td>
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<td>• Administrative Service Delivery</td>
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<tr>
<td>• Advancement &amp; Development</td>
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<tr>
<td>• Auxiliaries</td>
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<td>• Campus Capacity</td>
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<td>• Enrollment</td>
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<td>• Facilities Management</td>
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<td>• Financial Assets</td>
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<td>• Human Resources Services</td>
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<td>• Information Technology Systems</td>
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<td>• Leadership Structure</td>
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<td>• Procurement &amp; Strategic Sourcing</td>
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<td>• Research Business Model</td>
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<td>• Retention</td>
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<tr>
<td>• Strategic Partnerships</td>
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<td>• Tuition &amp; Financial Aid</td>
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<td>• Workforce Planning</td>
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In addition to the above focus areas, Huron will partner with the Academic Program Costs Team to review UNH’s academic portfolio, providing a platform for greater insights into the distribution of academic resources.
Opportunity Funnel

Huron utilizes client interviews, benchmarking, data analytics, and knowledge of industry best practices to quickly identify the most promising opportunities available to the institution.

Example criteria utilized in prior operational review engagements
- Service impact
- Estimated financial impact
- Productivity impact
- Legal compliance enhancement
- Internal stakeholder reaction impact
- Public relations / External stakeholder impact
- Reputational impact
- Implementation effort
- Implementation complexity
- Implementation costs
- Timeframe until benefits recognition
Opportunity Prioritization

A framework utilizing a standard set of evaluation criteria will allow the institution to prioritize opportunities of various types across the gamut of functional areas.

Example Prioritization Approach

1. High level menu groups opportunities by functional area or theme

2. Matrix maps impact v. required effort

3. Detailed menu catalogs and assesses more tactical improvements, including “quick wins”
Approach to Academic Resource Assessment

While portfolio assessment and design should be customized to institutional needs, generally, a phased approach focused on mission, data collection, data analysis, change management, and planning is ideal.

### Project Initiation

<table>
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### Opportunity Identification

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<tr>
<td>▪ Benchmark enrollment and tuition revenue to confirm marketplace position</td>
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<tr>
<td>▪ Aggregate multi-year institutional data sets (HR, Finance, and Registrar)</td>
</tr>
<tr>
<td>▪ Incorporate external demand data sets (census, labor markets)</td>
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<table>
<thead>
<tr>
<th>Deliverables</th>
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<tr>
<td>▪ Academic Discipline Taxonomy</td>
</tr>
<tr>
<td>▪ Themes and observations</td>
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<tr>
<td>▪ Course and instructional effort methodology</td>
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### Hypothesis Development and Testing

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<td>▪ Calculate cost to educate by course and department</td>
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<tr>
<td>▪ Measure efficiencies and identify underperforming programs</td>
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<tr>
<td>▪ Prepare future year revenue and enrollment projections</td>
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<tr>
<td>▪ Anticipate necessary organizational changes to resource investments</td>
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<table>
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<tbody>
<tr>
<td>▪ Cost to educate model</td>
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<td>▪ Instructional effort report</td>
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<td>▪ Academic efficiencies report</td>
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### Solution Development

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<td>▪ Develop a roadmap to engage the academic community</td>
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<tr>
<td>▪ Create a communication plan for internal and external stakeholders</td>
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<tr>
<td>▪ Finalize optimal program mix planning approach</td>
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<td>▪ Communication plan</td>
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<td>▪ Action plan</td>
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</table>
Keys to Effective Stakeholder Engagement

It is critical that the approach to assessing resource allocation patterns at UNH produces specific, actionable recommendations that can result in substantive changes and improvements where possible.

**Developing Stakeholder Buy-In**
- Clearly articulate campus and leadership initiative objectives and desired end-goals at the start of any effort
- Engage faculty, business process owners, and key campus stakeholders in opportunity identification and solution development
- Utilize data-driven business cases and objective measures to depersonalize and depoliticize change

**Prioritizing Change**
- Prioritize opportunities for implementation based on objective goals and realistic fortitude for change
- Pursue opportunities for enhanced enterprise-wide resource stewardship to provide institutional benefits

**Managing Change**
- Clearly understand the University’s appetite for change and ability to effectuate change leadership
- Ensure opportunity selection and implementation is driven and supported by leadership
- Ensure the planning process realistically considers the required timeframe and assesses potential project risks and mitigation measures

**Making Change Sustainable**
- Establish methods to continually measure savings achieved and track progress following implementation
- Systematically update campus stakeholders on progress achieved to ensure continued commitment
Discussion Questions

While Huron is scheduled to visit individually with each member of the UNH Provost’s Council, we welcome any initial feedback or perspectives members would like to share in today’s group setting.

- What do you consider to be the most significant actions the University has taken in recent years to identify administrative efficiencies? What material opportunities do you believe still exist?
- What successes/barriers has the University encountered in its past change initiatives?
- How have University stakeholders reacted in the past to efficiency or effectiveness change efforts?
- In addition to the groups that we are already planning on engaging, what other key stakeholder groups should we engage?
- What peer institutions do you recommend Huron look to for institutional comparisons?
Concluding Thoughts

Huron’s experience has taught us that there are no “ready-made” solutions for an impactful resource assessment, instead, initiatives need to be rebuilt on an understanding of institutional needs, cultures, strategies, and goals.

Huron will provide UNH with:

- Unmatched focus, commitment, and experience in higher education administrative improvement initiatives
- Data-rich lenses through which to view and understand the complex aspects of administrative service delivery and organizational design
- Insightful ideas about improving the effectiveness and efficiency of all areas of the university
- Solutions that can be effectively implemented to achieve stated goals and objectives
Next Steps

Huron looks forward to working with the university community to complete the following activities during the first half of the engagement.

Over the next five weeks, Huron will:

- Schedule Committee and Team meetings
- Conduct interviews and develop common themes
- Collect, organize, and analyze institutional data provided by the UNH and USNH community
- Identify and organize policy documents and institutional norms
- Present initial diagnostic assessment and solicit feedback for final solution development and implementation planning
THANK YOU