



THE UNIVERSITY OF
WESTERN AUSTRALIA
Achieving International Excellence

CYCLE OF PLANNING AND ACCOUNTABILITY

Version 1.0

http://www.registrar.uwa.edu.au/university_planning/strategic_operational_plans/cpa

May 2008



CYCLE OF PLANNING AND ACCOUNTABILITY

(Updated May 2008)

http://www.registrar.uwa.edu.au/university_planning/strategic_operational_plans/cpa

TABLE OF CONTENTS

EXECUTIVE SUMMARY	i
1. INTRODUCTION	1
2. CONTEXT	2
3. THE NATURE OF ACCOUNTABILITY.....	3
4. OVERVIEW OF THE CYCLE	3
4.1 Major Government Reporting and Accountability Requirements	4
4.2 University-Level Plans and the University Budget	4
4.3 Faculty-Level Plans and Reporting	5
4.4 Accountable Officers and Boards/Committees	6
4.5 Measures of Performance.....	6
4.6 The Cycle of Key Events.....	7
4.7 The Timetable of Events.....	8
5. INFORMATION REQUIREMENTS OF THE CYCLE.....	8
6. SUMMARY	9



CYCLE OF PLANNING AND ACCOUNTABILITY

(Updated May 2008)

http://www.registrar.uwa.edu.au/university_planning/strategic_operational_plans/cpa

EXECUTIVE SUMMARY

This document describes a process - the Cycle of Planning and Accountability - for ensuring that UWA systematically monitors and accounts for its performance in relation to its plans. It addresses in particular the performance review, evaluation and reporting phase of the UWA planning process (Appendix 1).

It is based on the principles of review, evaluation and accountability that are contained in the UWA Strategic Plan and is a formal element of UWA's governance and management framework, with a dual focus on external reporting and internal management obligations and responsibilities.

The Cycle is essentially a timetable or schedule of steps to be taken to achieve the following three-fold purposes in relation to performance review, evaluation and reporting:

- (i) to provide a greater degree of transparency and structure for these activities;**
- (ii) to achieve a greater degree of synchronisation and coordination; and**
- (iii) to facilitate a greater degree of accountability for achieving outcomes.**

The Cycle recognises the extensive array of review activities, such as school reviews, course reviews, and complements these with more standardised, data-driven reporting mechanisms, explicitly linked to UWA's key planning documents.

This version of the Cycle updates the original version, which was finalised in August 2002, in the light of changes in DEEWR requirements and the priorities articulated in the Operational Priorities Plan 2006-2008. In particular, consistent with the OPP operational objective "to strengthen the effectiveness of University policies and planning throughout the institution (individual, school, faculty, central)", includes a greater emphasis on faculty and school planning and accountability processes. Pursuant to the OPP objective "to embed the risk management framework and methodology throughout the University", it also covers key aspects of risk management.



CYCLE OF PLANNING AND ACCOUNTABILITY

(Updated May 2008)

http://www.registrar.uwa.edu.au/university_planning/strategic_operational_plans/cpa

1. INTRODUCTION

The Cycle of Planning and Accountability set out in this document describes a systematic formal process for annually ensuring that UWA monitors and accounts for its performance against its plans. It is integral to UWA's corporate governance system in that it reflects both external reporting obligations and internal management responsibilities. The Cycle of Planning and Accountability describes and schedules key steps in the annual planning process for reviewing, evaluating and reporting on performance, and assigns overall responsibility to designated office bearers for these activities.

As such, the Cycle embodies the following core values contained in the UWA Strategic Plan:

"• **Evaluation**

The University is committed to the regular evaluation of its activities and processes and believes that self-evaluation and review are central to the University's responsibility as an autonomous institution. Assistance from external evaluators is sought where necessary to ensure objectivity and credibility.

• **Decision-Making and Accountability**

Decisions within the University are made explicitly, openly and consistently, on the basis of relevant information, and as an integral part of the University's accountability to its staff and students, to the public and to governments."

The Cycle is also designed to reinforce the strong links between the broad planning directions articulated in the UWA Strategic Plan, the Academic Profile and the Operational Priorities Plan, and the UWA Budget (Estimates of Income and Distribution) and faculty plans. It is also designed to facilitate the systematic review and evaluation of performance using a set of standardised measures and an explicit timetable, which in turn provides the basis for formal reporting and informing the modification of plans for the next iteration of the planning cycle.

The Cycle has a key role in quality assurance and improvement through the systematic and transparent monitoring of UWA's achievements in teaching and learning, research, community service and management.

This second version of the Cycle reflects changes arising from revised DEST (now DEEWR) funding arrangements and reporting requirements, and the Operational Priorities Plan 2006-2008. Particular attention has been paid to supporting the OPP operational objectives "to strengthen the effectiveness of University policies and planning throughout the institution (individual, school, faculty, central)" and "to embed the risk management framework and methodology throughout the University".

2. CONTEXT

UWA has a robust planning process which was recognised as 'best practice' by the DETYA-commissioned independent review "Strategic Planning in Australian Higher Education Institutions" in 1999 (Andersen et al.), with particular commendation for its integrated nature and its explicit planning-budget nexus. The schematic representation of the UWA planning process (at Appendix 1) shows its integrated nature to good effect, with explicit links between strategic, long term planning (the Strategic Plan and Academic Profile), and operational medium-short term planning (the OPP, Institutional Management Plans, Faculty Plans), at both the whole-of-institution and local area levels. It also demonstrates how the planning process informs the UWA Budget (Estimates of Income and Distribution), which is critical in giving it operational substance. The schema also refers to performance review as an integral element in the planning process and it is this area which this document primarily addresses.

It must be stated from the outset that UWA engages in an extensive array of performance review and monitoring activities that pervade UWA, as Appendix 2 describes. Review, evaluation and reporting are fundamental to UWA's external and internal legislative and governance responsibilities; they are integral to the very strong academic performance culture on campus; and they are embodied fully in UWA policy and practice at every level, from the individual student and staff member, to the school, course, faculty and whole-of-institution level. They are therefore an integral part of UWA's quality assurance framework.

What this document seeks to achieve is the more systematic management of these activities and the placement of the most prominent events in a formal timetable. The purpose of this is essentially to:

- (i) provide a greater degree of transparency and structure for these activities;**
- (ii) facilitate a greater degree of synchronisation and coordination for these activities; and**
- (iii) better articulate responsibility for achieving outcomes.**

These three elements are integral to the accountability provisions of the UWA planning process.

In developing this approach for UWA, reference was made to examples of good practice in other institutions and acknowledgment is given in particular to the influence of the processes at the University of Melbourne and University of New South Wales in the details that follow.

While we have adapted practices from elsewhere to suit UWA's own planning and cultural ethos, the process that follows has been developed over time to align with UWA's organisational characteristics. The design of the Cycle must be well-aligned to UWA's structural arrangements and therefore takes full account of the role of faculties and schools, and the challenges of maintaining an appropriate balance between devolved and centrally managed functions and funds.

3. THE NATURE OF ACCOUNTABILITY

Although established as a self-governing autonomous institution by an Act of State Parliament, UWA is accountable to all of its stakeholders, both internal and external to the institution, for the values it upholds, the mission it pursues and the goals and priorities it sets. It must also account for the quality of its policies, programmes and performance, as well as for the financial well-being of the institution as a whole, and for maintaining the highest levels of probity in the conduct of its affairs.

UWA is accountable to a wide range of internal and external stakeholders including Federal, State and local governments, professional bodies, industry partners, sponsors and donors, academic peers, graduates, current and future students, employers and the local and wider communities.

UWA's activities are governed by a large number of Federal and State Acts and Regulations (in excess of 100 separate pieces of State and Federal legislation) as well as local government statutes and ordinances that essentially make UWA statutorily responsible across the full range of its activities as a provider of educational services, as a major employer and as a recipient of significant public funds. UWA's regulations and statutes assign specific responsibilities to a limited number of key officers of the University. The Cycle of Planning and Accountability extends the responsibility to account for performance to a broader number of officers who have key roles to play in delivering UWA's plans.

While the Cycle of Planning and Accountability has been developed in the context of accounting to its various stakeholders and meeting UWA's statutory obligations, it does not attempt to deal with the full range of UWA's accountability obligations. Rather, its principal focus is on achieving accountability for outcomes within a framework of annual events principally designed to ensure integration and coordination between the major activities undertaken in faculties and those managed centrally. In all cases, the Cycle emphasises the achievement of quality outcomes consistent with UWA's stated plans and performance targets.

4. OVERVIEW OF THE CYCLE

The Cycle of Planning and Accountability is essentially, then, an annual cycle of events that are undertaken to update University-level plans, translate those high-level plans into central and faculty operational plans, and finally review, evaluate and report on the outcomes of those plans. Responsibility for the steps in the Cycle lies with designated key officers of the University.

While the Cycle is designed to ensure that the University's plans, and associated strategies and targets are regularly updated and designated officers account for their performance against those plans, it is recognised that the steps and associated plans described in the Cycle can be varied with the specific authorisation of senior officers of the University in response to changing circumstances and requirements, such as emerging opportunities and threats and changes in statutory requirements. However the underlying principle is that the University will develop plans and articulate associated strategies to deliver the objectives articulated in those plans and ultimately account for its performance against targets specified in the plans on a regular basis.

The key elements of the Cycle are:

- **major Government reporting and accountability requirements,**
- **university-level plans and the University Budget,**
- **faculty-level plans, budgets and reporting,**
- **accountable officers and boards/committees**
- **measures of performance, and**
- **the cycle of key events and an associated timetable**

These are discussed briefly in turn below.

4.1 Major Government Reporting and Accountability Requirements

The following key government reporting requirements are taken account of in the Cycle:

- (i) The UWA Annual Report to the State government including Key Performance Indicators
- (ii) DEEWR Reporting Requirements, which include
 - Publishing details of courses, units, student contributions and fees
 - DEEWR Statistical Collections including:
 - Student Data Collections
 - Staff Statistics Collection
 - Financial Statements
 - Research Finance and Publications Data Collection
- (iii) DEEWR Institution Assessment Framework Submission including
 - Strategic Planning
 - Student Load Plan
 - Research and Research Training Management Plan (if required)
 - Equity Update
 - Indigenous Education Strategy
 - Capital Asset Management Plan
- (iv) DEEWR Funding Agreement - Actual versus Targets including
 - Total Commonwealth-supported student load
 - Total Commonwealth Grant Scheme funds
 - Commonwealth-supported student load by discipline cluster

4.2 University-Level Plans and the University Budget

The University's broad planning directions are articulated in the UWA Strategic Plan and the Academic Profile (Academic Plan), while the UWA Operational Priorities Plan provides more focus to these broad directions over a shorter timeframe, which are reflected, in turn, in the UWA Budget Model (Estimates of Income and Distribution). Key planning documents are described below.

- (i) The UWA Strategic Plan sets the framework for all other UWA plans. It states UWA's vision and the mission. While it has a long term timeframe, it is reviewed every five years and other modifications are made annually if required as part of the Cycle. Nonetheless it is expected that the mission, role and vision will remain essentially unchanged, reflecting the widely-held understanding of the University's purpose in serving the local, Australian and internal communities, and its overall future path towards international excellence.
- (ii) The Academic Profile identifies the University's academic directions and growth plans including priority academic areas. The Academic Profile has a medium to long term timeframe, but again, is reviewed every five years with other amendments made more frequently if required within the provisions of the Cycle.
- (iii) The Operational Priorities Plan (OPP) specifies high-level priorities for UWA that have been selected for priority over the five-year span of the OPP in the areas of:
 - Teaching and Learning
 - Research
 - External Relations
 - Staffing
 - Resourcing
 - Management

While a new UWA OPP is developed every five years, progress against the plan is monitored annually, and strategies and targets adjusted accordingly. (While the latest iteration of the OPP only covers the triennium from 2006 to 2008, future OPPs will be developed to cover five-year periods with more concerted effort made to adjust the targets and strategies annually.)

- (iv) The Management Plans for each functional area of activity (teaching and learning, research, external relations, etc.) document the planned activities and priorities within that area. They cover both activities prioritised for the OPP, and those which have not been selected for particular attention in the OPP but which are nevertheless important for UWA's development in the area concerned. These tend to be of one to five years duration, and are supposed to be synchronised with the UWA OPP and/or the annual budget (estimates of income and expenditure) for the respective areas.
- (v) The annual UWA Agenda is developed by the University Executive to identify the objectives and associated strategies which will be afforded the highest priority for the next year.
- (vi) The UWA Budget (Estimates of Income and Distribution) is reviewed annually and is the mechanism by which the resources associated with the plans outlined above are allocated. While the University has been moving to three year and longer-term budgeting, the annual nature of the UWA Budget exercise will continue to reflect the annual cycle of income and expenditure.

4.3 Faculty-Level Plans and Reporting

Under the Cycle, each faculty is required to develop strategic and operational plans with five-year horizons, develop budgets with a three-to-five year horizon but account for progress annually. Deans account for the performance of their faculty annually through the Cycle as described in section 4.6 below.

4.4 Accountable Officers and Boards/Committees

The responsibility for setting, achieving and reporting on outcomes in the Cycle is vested in key officers of UWA notably:

(i) Chancellor and members of Senate

The Senate has two clear roles in relation to this Cycle. The first is to provide strategic oversight to guide the planning of UWA and, as such, Senate will be involved in setting the strategic direction of UWA. It also has a role in performance monitoring and needs to be informed through regular reports of progress made towards key objectives. Senate's audit responsibilities relate to this role.

(ii) Vice-Chancellor and members of the Executive

The Vice-Chancellor and members of the Executive have the responsibility to manage the development of the UWA Strategic Plan consistent with the strategic directions articulated by Senate, and develop and account for progress towards objectives specified in the Academic Plan, Operational Priorities Plan and functional area plans, according to their portfolio responsibilities.

(iii) Deans

The Deans as the appointed heads of faculties have the responsibility to develop, implement and report on progress towards faculty plans that are consistent with the overall strategic direction and priorities of UWA, and to manage faculty resources to this end.

(iv) Boards and Committees

In a collegial culture such as ours, boards and committees play a significant role in the formulation and in monitoring the outcome of policy. The following committees are of particular significance in the Cycle:

- The Planning and Budget Committee (in particular, the annual Planning and Budget Workshops)
- Academic Board
- Academic Council
- Senate's Audit and Strategic Resources Committees
- Senate

although various other central committees are involved in policy formulation and the faculties are crucial to the Deans' responsibilities.

4.5 Measures of Performance

Under the Cycle, performance is assessed using indicators for mainstream UWA activities (e.g. in areas such as teaching, research, resources, management) with an emphasis on objective measures of outcomes which lend themselves to useful longitudinal and cross-faculty comparisons. A range of performance indicators are specified in each University plan and associated targets are set in consultation with relevant stakeholders, and performance against these targets is reviewed regularly.

Specific operational targets for each faculty are negotiated between key office bearers as part of the Cycle, so that the Deans and the Senior Deputy Vice-Chancellor (and Deputy Vice-Chancellors as appropriate) agree on a set of faculty performance targets that reflect appropriate faculty responses to the priorities expressed in the UWA OPP.

Performance indicators reports, including Selected Performance Indicators, Selected Faculty Performance Indicators, Teaching and Learning Indicators, Selected Research Indicators and Research Training Indicators are provided by Planning Services each year to assist in monitoring the University's performance, both internally and in comparison with other Australian institutions.

Performance indicators assist and inform, not supplant, expert (peer) review and judgement as appropriate. A comprehensive review programme which includes individual performance appraisal, school/faculty reviews, course reviews and institution-wide reviews is also undertaken. These reviews are both qualitative and quantitative in their character.

4.6 The Cycle of Key Events

The Cycle interweaves the development and review of major plans with variable time frames into an annual planning cycle with the following key features:

- The revision of the UWA Strategic Plan and Academic Profile and the development of the UWA OPP on a five-year cycle, with annual monitoring and adjustment of these as necessary. This adjustment process would inform annual reviews and modifications of the numerous University-wide management plans and ongoing policy development.
- The development by each faculty, every five years (with annual updating where necessary), of a Faculty Strategic Plan and a Faculty Operational Priorities Plan that progress the strategic directions articulated in the UWA Strategic Plan and Academic Profile, and support the achievement of the objectives articulated in the UWA OPP, which nonetheless articulate faculty-specific priorities and address matters such as emerging disciplines, new academic programmes and any proposed structural changes. Each Faculty OPP will include faculty performance targets primarily based on faculty-specific objectives articulated in the Faculty Strategic Plan and Faculty OPP. The targets will be negotiated between the Deans and the Senior Deputy Vice-Chancellor (and Deputy Vice-Chancellors as appropriate) and performance will be assessed annually against these targets.
- The development by the University Executive of the annual UWA Agenda which identifies the objectives and associated strategies mainly from the UWA OPP which will be afforded the highest priority for the next year.
- The development by each faculty, every year of a Faculty Budget with three year horizon which reflects the impact of strategies articulated in the Faculty OPP.
- The provision or designation of funds to assist faculties in the pursuit of their annual performance targets in priority areas (eg. via USF or earmarked faculty funding) with particular priority given to supporting activities consistent with the objectives and associated strategies articulated in the annual UWA Agenda.
- Regular reporting by the Vice-Chancellor on progress towards targets articulated in the UWA OPP at each Senate meeting and at the Annual Senate Planning Workshop.
- Annual reporting by Deans to the Senior Deputy Vice-Chancellor and to the Planning and Budget Committee on progress/performance against targets specified in the Faculty OPP.
- Plans and reports that are structured through the use of appropriate guidelines, templates and standard indicators.

- Overall, a framework that provides Deans with a mechanism for reporting to the Senior Deputy Vice-Chancellor, to Planning and Budget Committee and to their faculties on achievements during the past year.

4.7 The Timetable of Events

The cycle of key events described in the previous section have been summarised in a timetable of key events that are provided in Appendix 2. This timetable will be updated in response to changes in external reporting requirements and funding arrangements and to reflect constantly-evolving internal planning processes.

5. INFORMATION REQUIREMENTS OF THE CYCLE

The Cycle of Planning and Accountability involves the development of key documents that either specify major objectives with measures of performance and associated targets, or report on progress towards those targets. As discussed in section 4.5, performance is measured using sets of standard indicators for mainstream UWA activities (e.g. in areas such as teaching, research, resources, management) and specific OPP targets negotiated between key office bearers, such as Deans and the Deputy Vice-Chancellor. These indicators will be revised in successive iterations of the Cycle in response to changes in priorities. The Cycle therefore needs to be underpinned by information that is used to produce agreed indicators of performance.

The performance indicators are derived from a mix of data produced to meet external reporting requirements, such as the DEEWR data collections and the GCA Australian Graduate Survey, and data produced or held internally, such as from internal surveys. While the use of indicators derived from national data collections reduces the cost of producing those indicators and facilitates cross-institutional comparisons, these indicators need to be supplemented by additional indicators that focus on issues that are of specific interest to UWA and are not adequately covered by national data collections. Data for these additional indicators are derived mainly from surveys of students and staff and from UWA administrative computing systems. UWA also derives indicators from data obtained through agreements to exchange data with other universities, especially with other Australian and international universities under benchmarking arrangements.

While a set of common performance indicators is used to monitor performance by each faculty with respect to the UWA OPP objectives, targets based on these indicators are tailored for each faculty that reflect the priorities and capacity of that faculty in relation to the overall targets set for UWA. It is recognised that the faculties, schools and other organisational units are responsible for delivering components of an overall target, and therefore the process of setting faculty and university targets is iterative in nature.

Faculty Operational Priorities Plans are based on a standard format that relates to the UWA OPP and University-wide Management Plans, and includes a common set of indicators related to these common University-wide objectives. Faculty OPPs also contain faculty-specific objectives and associated performance measures and targets. Objectives and targets are generally for the next five-year period set in the context of performance in previous years and the current external outlook. Guidelines and templates for the preparation of Faculty OPPs will be developed and revised regularly as part of the Cycle.

Performance is also measured against specific operational targets in priority areas specified in Faculty OPPs. Targets are developed through negotiation between the Deans and the Senior Deputy Vice-Chancellor (and Deputy Vice-Chancellors as appropriate).

It should be emphasised again that the use of agreed quantitative indicators in this Cycle accompanies an extensive qualitative review process in which expert judgement, as well as objective data, is brought to bear on the evaluation of UWA activities.

6. SUMMARY

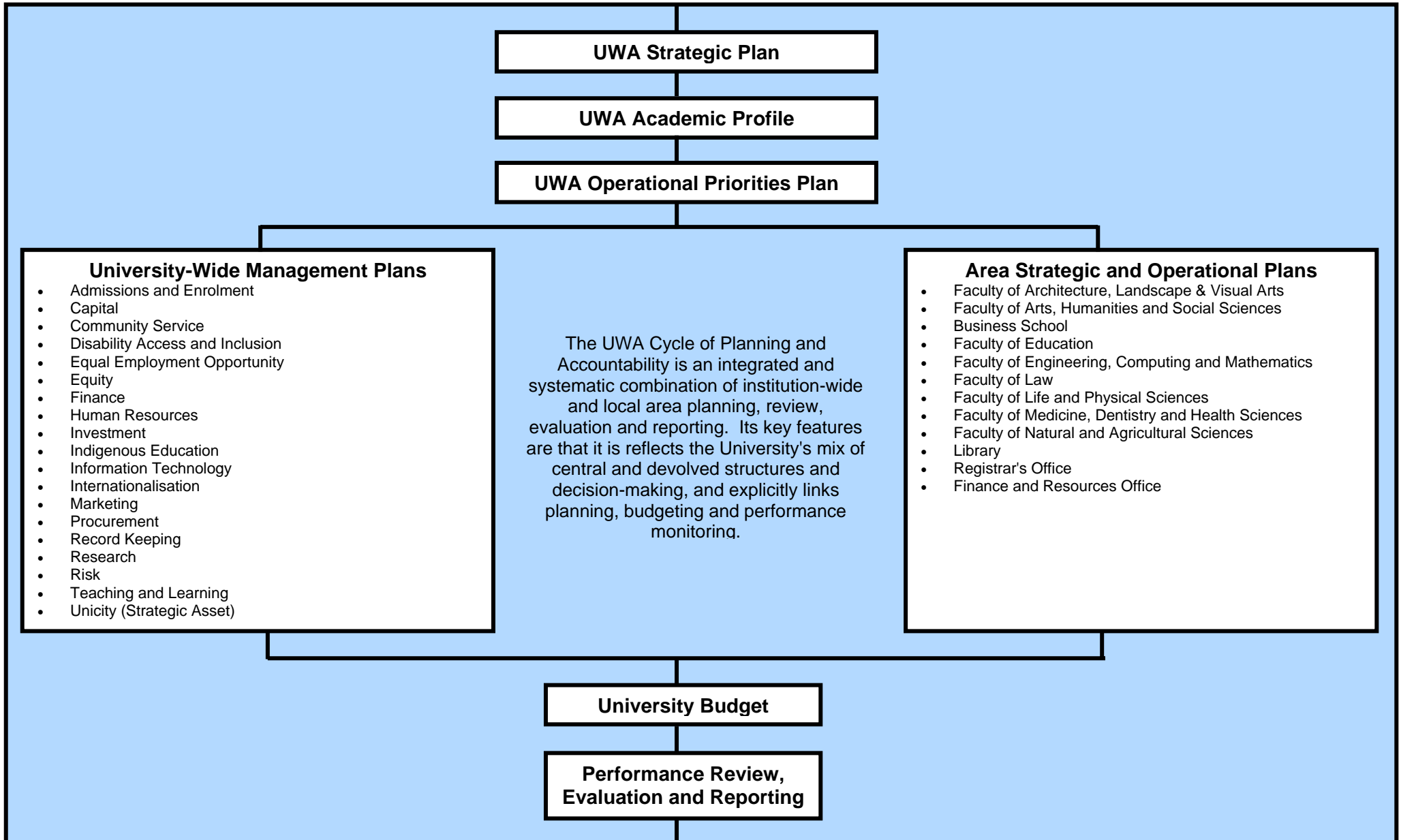
In summary the Cycle of Planning and Accountability has been developed to:

- complete the Performance Review stage of the University's planning cycle,
- strengthen the coordination and synchronisation between University-level plans and faculty plans with a structured and transparent process,
- assign the responsibility for planning activities to key officers of UWA, in order to ensure greater policy implementation/compliance.

The Cycle of Planning and Accountability document describes a set of steps that are undertaken annually interwoven with steps that are taken every five years; it also describes the information requirements and reporting guidelines for each stage of the Cycle.



APPENDIX 1 - CYCLE OF PLANNING AND ACCOUNTABILITY





APPENDIX 2 - CYCLE OF PLANNING AND ACCOUNTABILITY TIMETABLE OF EVENTS

The timetable for the key events that form the Cycle is shown below.

Date	Event	Executive Responsibility
Jan	<ul style="list-style-type: none"> • First round of admissions incl. adjustments to planned intakes. • University-wide call for USF Submissions. • Financial Accountability: Annual certification of compliance with University policies and procedures. 	Reg VC Deans/HOS's and Equivalent
Feb	<ul style="list-style-type: none"> • Second round of admissions incl. adjustments to planned intakes. • Package of Centrally-produced Performance Indicators for previous year to be finalised (Selected Performance Indicators and Selected Faculty Performance Indicators) (early-Feb). • Leadership Retreat (planning workshop for senior management) • Senate Strategic Directions Seminar (report on OPP performance and directions). • In fifth year of Cycle, Senate approval of new OPP (incl targets). • Financial Accountability: Presentation of University Annual Accounts. Approval and certification. • Financial Accountability: Report on actual financial performance against budget previous year. Review Consolidated University bottom up budget for current year. 	Reg Reg VC VC VC, ED(F&R) VC, ED(F&R)
Mar	<ul style="list-style-type: none"> • Annual Report to State Govt - Financial Statements and Performance Indicators. • University Executive to finalise the annual UWA Agenda (based on the OPP). • In fifth year of Cycle, commence complete review and revision of University Strategic Plan and Academic Profile in light of years 1 to 4. • In fifth year of Cycle, commence complete revision of OPP. • Deans to report to Executive on Faculty OPP performance in previous year and confirm/adjust performance targets for current year with SDVC. • OPP Executive Officers to review OPP performance in previous year, and suggest possible adjustments to targets and strategies as necessary. • Planning & Budget Workshop I: <ul style="list-style-type: none"> ➢ Review previous year's performance and progress with regard to the University's OPP, Faculty and School plans and confirm adjustments to targets and strategies. ➢ Review UWA Budget (Estimates of Income and Distribution) model parameters (if required). ➢ In fifth year of Cycle, initial discussion of the next OPP. ➢ In fifth year of Cycle, initial discussion of the outcomes of the University Strategic Plan and Academic Profile and possible shape of next iteration of the Strategic Plan and Academic Profile. • DEEWR Student Data Collection submission (due 31 Mar). • Financial Accountability: Half yearly SDVC, Dean financial evaluation meeting. 	Reg, ED(F&R) VC VC VC Deans VC VC, SDVC, Deans Reg SDVC, Deans, ED(F&R)
Apr	<ul style="list-style-type: none"> • Review of Admission and Quota Policy outcomes. • Commence development of the next Admission and Quota Policy including discussion with faculties of planned intakes for the next year. • Australian Graduates Survey (GDS/CEQ/PREQ) under way (30 April ref date). • DEEWR Student Data Collection Past Course Completions File (due 30 Apr). • Quarterly Financial Performance Report prepared and presented to Senate 	Reg Reg Reg ED (F&R)
May	<ul style="list-style-type: none"> • Submission to DEEWR of bids for new places, if required. • DEEWR Student Data Collection submission (due 31 May). • Financial Accountability: Review March quarterly executive format reports performance against plan. • Financial Accountability: March quarter Senate format reports. 	Reg Reg VC, SDVC, ED(F&R), Deans, HOS's VC, SDVC, ED(F&R)

Date	Event	Executive Responsibility
Oct	<ul style="list-style-type: none"> • Planning & Budget Committee: <ul style="list-style-type: none"> ➢ Consider updated risk management plans. ➢ UWA Budget (Estimates of Income and Distribution) confirmed. ➢ In fifth year, consider first draft of the new Faculty OPPs including draft performance schedule and targets. • VC reports on UWA Budget (Estimates of Income and Distribution) to Academic Board, Strategic Resources Committee, and Senate. • Schedule of student contribution amounts and tuition fees for next year to be published (DEEWR deadline 1 Oct). • Institution Assessment Framework discussions with DEEWR (every two years). • DEEWR Student Data Collection submission (due 31 Oct). • Quarterly Financial Performance Report prepared and presented to Senate. • Financial Accountability: Estimates of Income and Distribution budget. • Financial Accountability: Revised forecast completed. 	VC VC Reg VC Reg ED (F&R) VC, ED(F&R) VC, SDVC, ED(F&R), Deans, HOS's
Nov	<ul style="list-style-type: none"> • Faculty budgets finalised. • Deans adjust Faculty OPP's in light of budget outcome. • Outcome of bids for places and Funding Agreement finalised with DEEWR. • Update Cycle of Planning and Accountability Timetable. • Financial Accountability: Review September quarterly reports performance against plan. • Financial Accountability: September quarter Senate format reports. 	Deans Deans Reg Reg VC, SDVC, ED(F&R), Deans, HOS's VC, SDVC, ED(F&R)
Dec	<ul style="list-style-type: none"> • Planning & Budget Committee: <ul style="list-style-type: none"> ➢ Discussion of expected financial outcomes for the year. ➢ Final adjustments to income allocations for the current year under the UWA Budget (Estimates of Income and Distribution). ➢ USF Reports – progress w.r.t. allocations for current year. ➢ In fifth year, consider final draft of the new Faculty OPPs including performance schedules and targets. • Management plan updates finalised. • VC's annual report to Senate (as part of Senate Review of the Year). • Annual Report data collection commences. • Financial Accountability: Consolidated (bottom up) University budget presented to VC for approval. 	VC VC, Reg VC Reg VC, SDVC, ED(F&R), Deans, HOS's