Integrated Planning and Performance Procedure

1 Purpose

To provide the procedures for implementing the Integrated Planning and Performance Policy and associated frameworks.

2 Scope

This procedure applies to all University Members.

3 Procedure Overview

This procedure outlines the processes to be followed to enable an integrated approach to planning, reporting and performance evaluation.

4 Procedures

4.1 Roles and responsibilities

The roles, responsibilities and accountabilities are held by members of the University's senior executive and exercised with the frequency provided as set out in the Planning and Performance Schedules.

Planning

Plan level		Role	Responsibility	Approval authority	Frequency
1	Strategic	Strategic Plan development and approval	Vice-Chancellor	Council	Every 5 years
2	Core plans	Develop plans to underpin the strategic plan and mobilise key divisional portfolios	Divisional Heads	Vice-Chancellor	Every 5 years
3	Enabling plans	Develop plans to activate the	Relevant Executive Director	Vice-Chancellor	Every 5 years

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		strategic and core plans across activities such as International, People, Campus Development, Digital and Innovation			
4	Portfolio Plans	Portfolio Plan development	Vice-Chancellor's Executive	Vice-Chancellor	Rolling 3 year horizon
5	Annual plan and Operational Cycle	Executive Priority setting and resourcing methodology establishment	Vice-Chancellor's Executive members	Vice-Chancellor	Annually
		Operational Plan development and resource allocation	School/ department heads	Vice-Chancellor's Executive members	Annually

Performance Monitoring

Plan level		Role	Responsibility	Submitted to	Frequency
1	Strategic	Key Result Indicators (KRI)	Vice-Chancellor's Executive Members	Council	Bi-annually
2	Core plans				
3	Enabling plans				
4	Portfolio Plans	Portfolio Plan progress reporting	Vice-Chancellor's Executive	Vice-Chancellor	Quarterly
5	Annual Plan and Operational Cycle	Annual report development	Vice-Chancellor	Council	Annually
		Key Performance Indicators (KPI)	Planning	Vice-Chancellor's Executive members	Monthly
		Performance Indicators (PI)	School/ department heads	As determined by business area	Determined by business area

		Individual Performance Planning and Review	Individuals/ Supervisors	PPR System (accessible through HR Self-Service)	Annually/Bi-annually

4.2 Plan development and review

The University develops a five-year strategic vision supported by the hierarchy of plans.

4.2.1 Strategic Plan development

The University's Strategic Plan covers a five year period and is no more than two pages in length. It outlines vision, mission, values, purpose and overarching strategic direction and also includes:

- Relationship with/contribution to Government's objectives for the community
- University strategic objectives
- Key Result Areas
- Strategies
- Strategic Risks and opportunities
- Statement of the timeframe covered by the plan.

The Strategic Plan is developed consultatively with University Members and supported by a hierarchy of supporting plans, as provided in the Integrated Planning Framework. Consultation may be undertaken with the Queensland Minister for Education and/or Performance Unit within the Department of Premier and Cabinet.

The Strategic Plan must be submitted to Council for approval and is accompanied by advice outlining any major changes from the prior version and consequential resourcing impacts. Council approval and subsequent publication to the University's website takes place by 1 July each year and one electronic copy of the Strategic Plan is lodged with the State Library of Queensland via its electronic publications deposit service.

An annual review of the Strategic Plan is undertaken to ensure that it remains relevant and aligned to the University's external and internal environments.

4.2.2 Core and Enabling Plan developments

Supporting plans cover multiple timeframes and may include, but are not limited to:

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- Core plans - to underpin the Strategic Plan
- Enabling plans - to activate the Strategic Plan and core plans.

Supporting plans are reviewed at intervals determined by the Vice-Chancellor.

4.2.3 Portfolio Plans

Portfolio Plans are managed by the enterprise Portfolio Management Office (ePMO) leveraging the UniSQ Project Delivery Framework (UPDF). They consist of three-year rolling programs of work aligned to strategic objectives and oversighted by appointed governance boards. The governance boards consider and approve the three-year rolling Portfolio Plans which are organised into programs of work to ensure delivery of objectives and to heighten realisation of benefits. The Vice-Chancellor's Executive members manage and monitor the agreed portfolio of projects within the annual budget envelope approved by the University Council.

4.3 Operational Plan developments

An Annual Plan is developed at the enterprise level following requirements set out in the Agency Planning Requirements. The enterprise level plan is supported by ongoing rolling area Operational Plans and individual objective setting as part of the Performance Planning Review cycle.

Area Operational Plans and supporting budgets are developed as per the timeframes provided in the Integrated Planning Framework and include:

- Alignment to the Strategic Plan and the supporting plans provided in the Integrated Planning Framework;
- Operational activities, including timeframes and key milestones;
- Performance Indicators (PIs); and
- Progress updates.

Consideration is given to operational Risks and opportunities as part of operational planning as guided by the Enterprise Risk Management Policy and Procedure.

The annual operational planning cycle is a collaboration between:

- Divisional Head;
- Relevant School Head (Academic Areas)/Department Head (Professional Areas);

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- Finance and Business Solutions Business Partners; and
- People Partners.

The plans are captured and published in the Integrated Planning intranet and are submitted to Divisional Heads for approval and implemented by School/Department Heads. They are reviewed on a regular basis to ensure they are responsive to changes in internal and external environments.

4.4 Performance monitoring, evaluation, and reporting

A cascade of quantitative and qualitative measures provides for the monitoring, evaluation and reporting of performance.

4.4.1 Strategic, Core and Enabling Plan performance

4.4.1.1 Key Result Indicator (KRI) development

KRIs are the key measures of the end results the University is endeavouring to achieve. They:

- Are usually (but not always) lagging and can often only be measured across longer intervals
- Can provide a basis for benchmarking results against the sector/peer groups
- Often focus on 'core business' outcomes
- Are developed collaboratively
- May include headline qualitative targets supported by a small cluster of result indicators with quantitative targets.

4.4.1.2 KRI capture, review, amendment and reporting

A central repository of KRIs is developed and maintained within the Integrated Planning intranet. As a minimum it will contain:

- Alignment with strategy;
- Identification of KRIs and their targets;
- Identification and tracking of appropriate measures; and

- Assignment of responsibility for performance to the KRI.

KRIs and targets are reviewed bi-annually by Vice-Chancellor's Executive. They are published on the Integrated Planning intranet and supported by relevant KPIs.

Performance to KRIs and targets is monitored by Vice-Chancellor's Executive Members and qualitative and quantitative performance updates reported to the Vice-Chancellor and discussed at Vice-Chancellor's Executive and Council bi-annually.

4.4.2 Portfolio Plan performance

Delivery of outcomes and benefits is managed through the UniSQ Project Delivery Framework. The Vice-Chancellor's Executive members ensure that appropriate tiered governance structures are in place and that appropriate degrees of project management are applied. The UniSQ Project Delivery Framework provides the scaled project documentation and reporting mechanisms.

4.4.3 Operational Plan performance

4.4.3.1 Key Performance Indicator (KPI) Development

KPIs are the key measures of the activities the University is undertaking to achieve end results. They align to the KRIs and:

- Are either leading measures or shorter-term results that can be measured more frequently than KRIs to aid performance monitoring and ongoing management action; and
- Focus on the operational performance supporting progress towards the strategic plan.

KPIs are identified from a central repository of Performance Indicators (PIs) identified by Divisional areas.

4.4.3.2 KPI capture, review, and reporting

The PI central repository is developed and maintained within the Integrated Planning intranet. As a minimum it will contain:

- Alignment with KRIs;
- Identification of KPIs;
- Identification and tracking of appropriate measures; and

- Assignment of responsibility for performance to the PI.

Performance of KPIs is reported to and discussed at Vice-Chancellor's Executive monthly.

Performance PIs should be regularly discussed within teams contributing to them and embedded in individual objective setting where relevant.

4.4.4 Focused performance evaluation

To ensure the efficient and effective performance of the University all areas are continuously evaluated. The University will use multiple internal and external Information sources to determine where focused evaluations are necessary. Focused evaluations gather detailed Information across processes, systems, and people, comparing against best practice and external benchmarks.

Focused evaluations should follow University guidelines and may be conducted by the Business Unit, supported by other Business Units and/or supported by an external party. Where a focussed evaluation is to be supported by an external party, this must be; sponsored by a member of the Vice-Chancellor's Executive; involve scope consultation with People Portfolio and Business Advisory and have approval from the Vice-Chancellor before proceeding. As a minimum outcome, a written report must be submitted to the Vice-Chancellor outlining methodology, Information gathered, recommendations, potential resourcing impacts and an implementation plan. The Vice-Chancellor advises the sponsor of the outcome and the sponsor is responsible for implementation of the recommendations and provision of a progress report 18 months after the Decision. The initial report, Decision and subsequent progress report/s forms part of the corporate record.

5 References

Department of the Premier and Cabinet, 2021, *Agency Planning Requirements (2022 planning period),* accessed 5 May 2022, https://www.forgov.qld.gov.au/__data/assets/pdf_file/0023/183551/agency-planning-requirements.pdf

Department of the Premier and Cabinet, 2020, *Queensland Government Performance Management Framework,* accessed 6 May 2022, https://www.forgov.qld.gov.au/__data/assets/pdf_file/0017/183212/performance-management-framework-policy.pdf

6 Schedules

This procedure must be read in conjunction with its subordinate schedules as provided in the table below.

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7 Procedure Information

Accountable Officer	Chief Operating and Financial Officer
Responsible Officer	Head (University Strategy and Government Relations)
Policy Type	University Procedure
Policy Suite	Integrated Planning and Performance Policy
Subordinate Schedules	
Approved Date	14/8/2025
Effective Date	14/8/2025
Review Date	6/12/2027
Relevant Legislation	*University of Southern Queensland Act 1998*
Policy Exceptions	Policy Exceptions Register
Related Policies	Enterprise Risk Management Policy Performance Planning and Review Policy
Related Procedures	
Related forms, publications and websites	Integrated Planning Framework (restricted access) Key Result Indicators (including targets) (restricted access) UniSQ Project Delivery Framework
Definitions	**Terms defined in the Definitions Dictionary**
	Council Council means the governing body, the University of Southern Queensland Council. Decision A determination made by an Employee, contractor or other authorised delegate in the course of their duties on behalf of the University. Information Any collection of data that is processed, analysed, interpreted, organised, classified or communicated in order to serve a useful purpose, present facts or represent knowledge in any medium or form.

This includes presentation in electronic (digital), print, audio, video, image, graphical, cartographic, physical sample, textual or numerical form.

Key Performance Indicators

The key measures of activities the University is undertaking to achieve the aims of the strategic plan.

Key Result Indicators

The key measures of the aims of the strategic plans the University is endeavouring to achieve.

Operational Plan

The Operational Plans developed by the University, as required under Section 8(1)(b) of the Financial and Performance Management Standard 2019.

Performance Indicators

The measures of activities the University is undertaking to achieve end results.

Risk

The effect of uncertainty on objectives.

Strategic Plan

The Strategic Plan developed by the University, as required under Section 8(1)(a) of the Financial and Performance Management Standard 2019.

University

The term 'University' or 'UniSQ' means the University of Southern Queensland.

University Members

Persons who include: Employees of the University whose conditions of employment are covered by the UniSQ Enterprise Agreement whether full time or fractional, continuing, fixed-term or casual, including senior Employees whose conditions of employment are covered by a written agreement or contract with the University; members of the University Council and University Committees;

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	visiting, honorary and adjunct appointees; volunteers who contribute to University activities or who act on behalf of the University; and individuals who are granted access to University facilities or who are engaged in providing services to the University, such as contractors or consultants, where applicable. Vice-Chancellor The person bearing the title of Vice-Chancellor and President, or as otherwise defined in the University of Southern Queensland Act 1998 , including a person acting in that position.
	Definitions that relate to this procedure only
Keywords	
Record No	22/218PL

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