

## Advisor Report Guidelines

The guidelines for the unit self-study document were designed to allow a unit to reflect on its mission, the services it provides, its strengths and challenges, and its future plans. In preparing your report from the review, we would like you and your colleagues to offer comments on where the unit currently stands, but primarily focus on providing recommendations that will inform the unit's future plans.

The questions outlined on the following page are of particular interest to the University as an outcome of this review, so we hope you might be able to address these themes in your final report. We also welcome your input on any items you view as important that we may not have mentioned specifically.

As you draft the report, please note that the document will likely be shared within the University. As such, please refrain from mentioning any specific individuals in your report, for praise or otherwise, because it can raise questions for staff members regarding why they were or were not specifically named. *If you have a particular issue to raise (positive or constructive) regarding a specific individual or would like to note any otherwise sensitive issues, please send a separate confidential letter to the attention of our Executive Vice President, John Affleck-Graves. His email address is: [jaffleck@nd.edu](mailto:jaffleck@nd.edu).*

We would greatly appreciate a final written report from your team of external advisors within **two weeks** of the on-campus visit. **Please send the final report to Kathryn Valenti, Strategic Planning Program Director, at [kvalenti1@nd.edu](mailto:kvalenti1@nd.edu).** If this timing presents any difficulty or if you have any questions, please do not hesitate to contact Kathryn via email or by phone at (574) 631 0392. Thank you again for your time and expertise – we look forward to your recommendations for the advancement of the unit.

## Advisor Report Guidelines

### I. Current State of the Unit

Please discuss your assessment of the unit's chief strengths and main challenges and offer recommendations on how it can best address its challenges.

*Please feel free to comment on strengths and challenges in the following areas, or others as needed: talent and organizational structure; facilities, space, and equipment; technology; operational policies and procedures; budget and financial resources; risk management and safety; and customer service.*

### II. Metrics and Benchmarking

- Are the metrics tracked by the unit sufficient and appropriate?
- Do you have any comments on the unit's performance against these measures?
- Are there other resources or industry standards the unit should be using in developing its metrics?
- How are the services provided by this unit similar or different to those you have typically seen provided by peer institutions or organizations?
- Which institutions in higher education (and relevant organizations outside of higher education, if applicable) would you consider to be "best in class" in this area? What are their attributes that caused you to identify them as best in class?
- Are there any industry or professional associations with which the unit should be involved?

### III. Future Plans

- Do you feel the plans the unit has outlined for its future are aspirational, yet feasible?
- Is the unit accurately anticipating the impact that future trends might have on its operations?
- Would you recommend changes to the unit's inventory of services or the levels of emphasis accorded each service based on anticipated future trends?

### IV. Recommendations

Above you may have mentioned opportunities for change or improvement for the unit. In order to enable the unit to focus its resources on the areas that you deem most important, please provide a prioritized list of your top 5-10 recommendations that would help the unit progress the most over the next five years.

*Please note: As stewards of the University's resources, it would be helpful for us to receive recommendations that are resource neutral or could be achieved through a reallocation of the unit's existing budget. We would still like you to mention recommendations that may require new resources, although not all reviews will result in increased funding for the unit.*

Please do not include the following in your report, but we would appreciate it if you could comment on what you found helpful/unhelpful in the self-study document. We would also welcome your feedback on anything that might be improved with respect to the review process more generally. Please send your comments to Kathryn Valenti at [kvalenti1@nd.edu](mailto:kvalenti1@nd.edu). Thank you.