PBA Evaluation Rubrics

Institutional Effectiveness & Planning
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The following standards are used to evaluate the PBA process’ success in fostering a culture of planning, assessment, improvement and accountability at the institutional level. They thus provide useful guidance to units in developing their strategic plans, budget requests, and PBA presentations. These standards are neither used to evaluate individual units nor to make allocation decisions.

PBA REQUESTS

Units should justify plans as affecting the achievement of planning elements for the unit or related units, or benefit to the unit or institution using assessment or SWOT findings (including matters that would typically be identified in SWOT analysis even if not specifically identified in a formal SWOT exercise) or other data that may be available to the unit. Requests are evaluated holistically. Incidental mention of data is not in itself sufficient for rating in higher categories; a "connected" or "strongly connected" rating indicates a coherent argument for the request across findings, expected effects, and data.

- **Strongly connected.** The rationale justifies the request explicitly as a response to assessment or formal SWOT exercise findings and describes specific expected effects on unit objectives.
- **Connected.** The rationale identifies specific findings and planning effects or benefits, and links effects or benefits to data
- **Limited connection.** The rationale mentions relevant effects or findings but without specifying them in detail or explicitly connecting findings and effects.
- **Not connected.** The rationale provides little justification beyond unsubstantiated assertions.
- **No Justification.** The rationale simply describes the request in more detail (e.g., itemizing the use of funds requested) without offering any justification for it.

The connection between PBA requests and unit planning improved significantly from 2014 to 2015. One-third of PBA requests included a sound connection to units’ objectives, assessments, or strategies in 2015, double that of the previous year. The percentage of requests with no connection to planning fell by nearly half. This shows the increasing success UVU has in building a culture of planning, assessment, and improvement.

![Graph showing the percentage of connected PBA requests from 2014 to 2015]