

# Planning and Budgeting

## Multi-Year Strategic Plan

About ten years ago, the Open University designed a model for the preparation of work programs and a decentralized budget. The process of building work models has since become a matter of routine in both the academic and the administrative departments. A long-term plan also began to take form, along similar lines to the five-year plan for recruitment of senior faculty members and the four-year plan for academic development.

In the 2010-11 academic year the process of building a multi-year plan was formalized for the first time, on the basis of a document named "Guidelines and Directions for OUI Development for 2009-2014," which was published by OUI President Prof. Hagit Messer-Yaron. The following primary and secondary goals were defined:

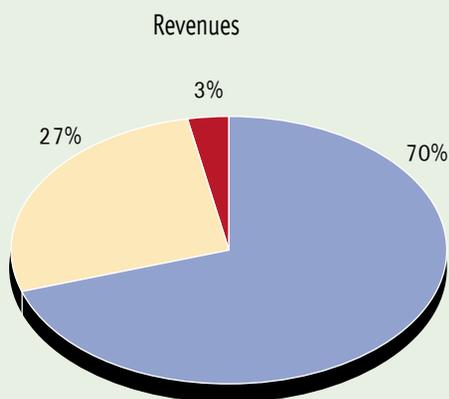
Primary Goal	Secondary Goal
Reaching new populations	Online OUI studies overseas Academic studies without accumulating credits ("non-degree students") Targeting specific populations for degree studies: <ul style="list-style-type: none"> <li>• The Arab sector</li> <li>• The ultra-Orthodox sector</li> </ul>
Increasing the number of graduates by encouraging students with 72 credits to complete their degrees	Encouraging dropouts to return Eliminating dropouts – accelerated project
Varying programs of study	Independent supervision of PhDs by senior OUI faculty Study programs based on existing disciplines: pooled programs
Enhancing research at the OUI	Initiating and activating special research centers Improving research infrastructure for senior faculty
Updating and developing courses	Updating courses – closing gaps and designing mechanisms for periodic updates Supervising development of new courses
Enhancing the OUI's market positioning	Improving OUI's public image
Retaining and improving existing achievements	Improving student assistance facilities Development of managers; training of units Streamlining data production processes: culture, responsibility and standardization Expanding the course related technological toolbox Improving handling of queries
Improving work procedures	Designing and implementing a feasible long-range strategy (organization and methods)
Improvement of annual and long-range planning	Establishing a methodology for annual and long-range planning based on existing methodologies
Varying sources of income	Designing a feasible plan for varying existing sources of income by initiating and locating sources of revenue other than the PBC and tuition fees

To direct the plan, a Steering Committee was set up, consisting of the OUI management and the program directorate. The Steering Committee also received organizational advice. At the initial stage, members of the program directorate were Avinoam Lazarov and Shmuel Steinmetz; in the second stage, Avinoam Lazarov and Dr. Relly Brickner.

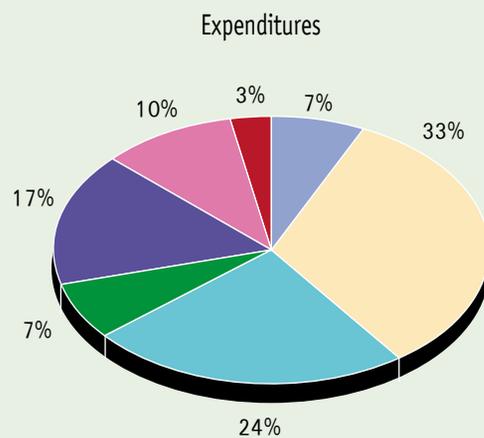
To implement the program, work teams were set up that included members of the academic faculty and administrative personnel, with a team leader appointed for each team. Work stages and schedules were determined and the program was submitted to all heads of academic departments, heads of administrative units, and team leaders. Each team convened for working meetings in the course of which they submitted the results of their endeavors to the Steering Committee, and received feedback, recommendations and approval for further activity. In March, the goals and principles of all the teams were submitted at a meeting attended by all team members. By June, the teams were able to present their work programs and requisite budgets to the Steering Committee, which then reviewed all the proposals, approved work programs and performed budget integration. Shortly before Rosh Hashanah, an open meeting was held for all OUI employees, at which the team leaders presented all programs that were approved for 2012.

At the end of each year, there will be a review and evaluation of the plan, and decisions will be made on the nature and scope of continued activity, according to the degree of implementation and subject to budget availability.

**OUI Budget 2010-2011, Revenues vs. Expenditures**



- Tuition fees
- Planning & Budgeting Committee allocation
- Other



- Senior faculty salaries
- Teaching staff salaries
- Administrative staff salaries
- Other salaries (writers, proctors, etc.)
- Operation of teaching and research
- General and administrative expenses
- Building and property expenses

### Total University Budget for 2011-2012 (in K-NIS)

	2010-2011	2011-2012
<b>Revenues</b>		
Planning & Budgeting Committee allocation	126,172	174,229 *
Tuition	326,502	282,934 *
Miscellaneous (sales of books, financing, etc.)	11,771	9,879
Transfers to the multi-year plan		15,253
<b>Total Revenues</b>	<b>464,445</b>	<b>482,295</b>
<b>Expenditures</b>		
<b>Salary Expenditures</b>		
Senior faculty	31,924	32,379
Teaching staff	151,294	159,547
Administrative staff	112,571	123,547
Other salaries (writers, proctors, etc.)	34,548	29,278
<b>Total Salary Expenditures</b>	<b>330,337</b>	<b>344,751 **</b>
<b>Other Expenditures</b>		
Operating, teaching & research expenditures	75,859	78,267
General & administrative expenditures	45,531	46,901
Building & property expenditures	12,718	13,683
<b>Total Other Expenditures</b>	<b>134,108</b>	<b>138,851</b>
<b>External Studies (Ma'aleh)</b>		
Revenues	51,303	65,057
Expenditures	51,303	63,750
<b>Total University Revenues</b>	<b>515,748</b>	<b>547,352</b>
<b>Total University Expenditures</b>	<b>515,748</b>	<b>547,352</b>

\* In accordance with the directive of the Planning and Budgeting Committee (*Vatat*), beginning in the 2011-2012 academic year, students are charged reduced tuition fees; the basic PBC allocation increased accordingly, by approx. NIS 43m.

\*\* This includes the NIS 15.2m for goals approved in the multi-year plan for 2011-2012.