**Program/Service Summary and Analysis Template**

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| **Work Bundle:** |  |
| **Target Audience/ Customer:** |  | **Audience/Customer Value:** |  |
| **Key Deliverables/Outcomes:** |  | **Organizational Value:** |  |
| **Success Measures/Metrics:** |  |
|   |
| **Core Processes/Steps:** | **Timing** | **Resources** |
| People | Finances | Facilities | Systems |
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|  | **Senior Leadership** | **Management** | **Staff** | **Student Employees** |
| **Current Accountabilities** |  |  |  |  |
| **Recommended Accountabilities** |  |  |  |  |
| **Required Skill Sets** |  |  |  |  |

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| Completed By: |  | Position Title: |  | Date Completed: |  |

**Template Instructions**

*The information outlined below outlines the kind of information requested for each section of the template. The goal of the template is to provide a substantive summary of a particular bundle of work (related tasks to accomplish a defined goal), and as such it is requested that you include enough information for someone not familiar with the work to understand the general work included, as well as the general focus and goals of the specific work bundle.*

**Target Audience/Customers:** Defines the groups of people, either within the Brock Community or not, at which the work bundle is directed and meant to positively impact. There could be multiple groups the program/service supports. Be as specific and inclusive as possible.

**Key Deliverables/Outcomes:** Identifies the main points of realization of the work bundle. Items listed here should be tangible outcomes linked to the work, such as an information session, large scale student event, etc. These items will be the main proof or realization that work has been undertaken.

**Audience/Customer Value:** For this section, information should be added that outline how the identified audience/customer group(s) will benefit from the work. The question that needs to be answered is, what will the audience/customer get out of this bundle of work? How will it make them better off?

**Organizational Value:** For this section, information should be added to outline how the work furthers the goals and objectives of Brock University, including the academic mission of the university. How does this work help Brock achieve success?

**Success Measures/Metrics:** This section looks to explore what metrics and operational measures are being collected, reported on, and/or are used for decision making with respect to the bundle of work. Please identify the metric and the use of that measure.

**Core Processes/Steps:** In this section of the summary, you are asked to outline what the general steps or work phases that are required to appropriately deliver the bundle of work. Each program/service will likely have between 4-7 major phases of work.

**Timing:** For each major work phase/step, please indicate which months the phase of work is typically performed in. It is possible and likely that for some work, the phase will be accomplished over several months. Please take into account flex in start and completion times for the work phase.

**Resources – People:** For each major work phase/step, please indicate the number of staff needed to reasonably complete the phase/step on time, and as well, please indicate an estimate for the total work hours that would be required to complete the work.

**Resources – Finances:** For each major work phase/step, please indicate the value of any and all costs or expenditures, outside of salary/wages, that are typically incurred for that work phase/step. Please indicate the typical total non-employee spend, and identify any significant cost items/purchases.

**Resources – Facilities:** For each major work phase/step, please indicate the facilities and/or space required to deliver on the program/service, including office space, meeting space and other facilities utilization requirements.

**Resources – Systems:** For each major work phase/step, please indicate any non-standard (e.g. exclude Excel, Power Point, etc.) systems or technology directly used in the completion of the work phase/step.

**Current Accountabilities:** For each major level of the organization identified, please indicate the major accountabilities with respect to the delivery of the work as they currently exist.

**Recommended**

**Accountabilities:** For each major level of the organization identified, please indicate the major accountabilities with respect to the delivery of the work as they would be distributed in an ideal world/work situation.

**Required Skills Sets:** Looking at the collection of accountabilities listed on Recommended Accountabilities for each organizational level listed, identify important/required skill sets needed to be successful at the accountabilities listed.