

College Strategic Planning Session  
For Senior Fiscal Officers  
**Development of a Financial Resource Plan (Agenda for Action)**

August, 2008

**Major Objective:** *Reasonably align* projected available resources by funds type and source with the strategic plan (investment). Approaches might be based upon flat projections, modest projections, or the combination, particularly considering "breakthrough" opportunities (e.g., award of a large strategically sought after grant; landing a large endowment or unrestricted use gift, etc.)

AGENDA

Overview (handout)

Mike Sherman

- Linking Financial Resources to Strategic Plan
- Senior Fiscal Officer and the
- Timeframe for completion of Financial Resources Plan

Description of Financial Resources Plan

- Key elements to include in the plan
- Example from College of Engineering
- The resource needs and sources approach to developing the Financial Resources Plan

Suzi Ballinger  
Marie Mead

Donna Hobart

Questions/Discussion

All

---

Additional resources:

<http://www.oaa.osu.edu/StrategicPlanning2.php>

[http://www.oaa.osu.edu/Strat\\_Planning\\_Workshops.php](http://www.oaa.osu.edu/Strat_Planning_Workshops.php)

Example of a Financial Resources Plan-Agenda for Action

<http://www.oaa.osu.edu/documents/FCoBPrePlanningDocument.pdf>