UCCS University of Colorado
Colorado Springs

Budget and Planning

STRATEGIC PLAN

2017-2021

DEPARTMENT PROGRAM REVIEW PROCESS OVERVIEW

During the Fall of 2015, a new Program Review process and cycle was developed for all Administration and Finance units. The goals of this new process included being manageable in terms of work load and useful to department heads/staff in assessing unit progress and making improvements. In addition, consistency across the division, while allowing for some flexibility based on the wide variety of department functions, was desired. After completing a self-study, VCAF units incorporated stakeholder feedback in the form of a campus review done by the Division Assessment Committee, which is comprised of student, faculty, and staff representatives from within and outside the division. In addition, departments could choose to include an external review component, and incorporate existing assessment efforts, as well as any relevant national standards and/or benchmarking tools. All of these components informed each department's strategic goals, which are targeted for completion during the next four years.

BUDGET AND PLANNING INTRODUCTION

Members of the Budget and Planning team met with Jacqui Gatlin and Aaron Burton on November 27, 2017 to get information about the process for the assessment and to get questions addressed. We then added time to our regularly scheduled department meetings to begin discussion with our entire team on how to get started on the assessment. We brainstormed ideas on what we thought we should address for goals and OFI's on the self-analysis worksheet and then we continued to address the strategic planning process for our area. We put in many hours establishing what our goals should be, updating our mission statement and core values, addressing areas where we need work and ultimately creating our strategy plan for the next four years.   Our team includes Suzanne Scott, Rhea Taylor, Scott Reardon, Terri Wagner, Ben Davies and Paul Goslin.

DIVISION MISSION

As a partner in learning and through the stewardship of resources,
the Administration and Finance division provides innovative programs and services
to support the student–centered mission of the University

BUDGET AND PLANNING DEPARTMENT MISSION AND CORE VALUES

Our mission is to work in partnership with our campus community to coordinate campus-wide budget and fiscal planning, while maintaining state and university fiduciary standards. Through collaborative partnerships, we strive to identify and facilitate the allocation of all resources necessary for the UCCS campus to excel as a premier comprehensive undergraduate and specialized graduate research university.

The Budget Office's guiding principles are:

- Defined budget development and implementation for all funding on campus.
- Provide outstanding customer service to our campus constituents and all of our stakeholders.
- Long and short-term fiscal planning and data analysis.
- Developing working models for allocation of resources.
- Provide budgetary representation on campus, university and community committees.
- Generating budget reports for all areas on campus and work with them to provide fiscal support.
- Processing, reviewing and approving budget journals.
- Analyzing tuition and fee revenues and their allocations.
- Provide accurate, timely information to the system office and Board of Regents as requested.

STRATEGIC ADVANTAGES

- Presently the Budget & Planning team has over 50 years combined experience working in higher education and a majority of those years is within the CU System and/or working specifically with higher education budgets. This combination of experience and dedication to higher education has created a very cohesive Budget and Planning team.

- Each member of our team possess a strong dedication to customer service, demonstrated by consistent detailed attention to budget journal entries submitted for review and approval, timely response to inquiries and regularly established meetings with campus departments.

- We strive for exceptional collaboration with campus community through training and one on one partnerships.

STRATEGIC CHALLENGES

- While our team has a tremendous amount of higher education experience, not all has been at UCCS or within the Budget Office. This leads to a challenge when dealing with the complex details of the UCCS budget process and tasks and the transfer of knowledge can be time intensive.

- Gathering and tracking customer feedback, while we believe is very important, can be difficult to quantify.

- Time remains one of the biggest threats/challenges we identified. Time to exchange knowledge, to get the work completed with the level of detail expected from our department and time to provide campus the support they need.

BUDGET AND PLANNING STRATEGIC GOALS

PROGRAM REVIEW CATEGORY (IES):

Mission and Leadership

Goal 1.1: Professional Development

Action Steps and Timeline	Individual(s), committee or groups assigned.	2017-18	2018-19	2019-20	2020-21
1. Encourage Professional Development by adding the requirement to all employees' Performance Evaluation criteria.	Suzanne Scott/Rhea Taylor	Add to next year's plans	Added to this year's plans	Ongoing	Ongoing
2. Pass along opportunities for growth as emails and invitations arise from resources inside and outside of System.	BAP Team		All team members will share training opportunities	Ongoing	Ongoing

Outcomes	How will progress be measured?
1. Will result in completion of various professional development opportunities by each team member.	Each team member completes professional development courses and they are documented as part of the final employee evaluation procedure.
2. A Team shared approach to encourage and support one another in professional development creates cohesion and unity.	The team exchanges information in our weekly meeting regarding what trainings they know are coming up or they share information about what recent trainings they have attended so others may attend in the future.

3. The team will become more informed and knowledgeable on topics important in our area.	Team will provide better customer service through knowledge exchanges with campus. This will be result in positive feedback from surveys we provide after meetings with our customer base. This will also be documented in coaching sessions with our staff and will be reflected in annual performance reviews.

PROGRAM REVIEW CATEGORY (IES):

Services and Operations

Goal 2.1: Informational meetings for campus community

Action Steps and Timeline	Individual(s), committee or groups assigned.	2017-18	2018-19	2019-20	2020-21
1. Establishing informational meetings prior to large projects that require campus collaboration	BAP Team		Beginning in July with new FY	Ongoing	Ongoing
2. Create regular, interactive training opportunities for our campus financial constituents.	BAP Team		Beginning in July	Ongoing	Ongoing

Outcomes	How will progress be measured?
1. Share information and increase knowledge across our campus on budget related procedures and processes.	Send out surveys to those who have attended our informational meetings to gather feedback on what we have done well and what else we need to cover.
2. Create synergy through increased knowledge across our campus on budget related issues and impacts.	Through results of survey information gathered, we will empower our fiscal managers with information to do their jobs correctly resulting in fewer questions to our office through phone and email contacts.

BUDGET AND PLANNING STRATEGIC GOALS

PROGRAM REVIEW CATEGORY (IES):

General Trend

Goal 3.1: Establish a plan that maximizes the efficiency of the budget and planning office due to increased demands from continued campus growth.

Action Steps and Timeline	Individual(s), committee or groups assigned.	2017-18	2018-19	2019-20	2020-21
1. Create and maintain a list of job duties each team member is responsible for, to include each department or area on campus that the BAP team member serves as a point of contact.	Rhea Taylor	Began in February	Ongoing	Ongoing	Ongoing
2. Continue to invest time monthly to share knowledge of the more complex B&P operations to include: Budget Model, Proformas, Tuition and Fees, etc.	Suzanne Scott and Rhea Taylor		July 2018	Ongoing	Ongoing

Outcomes	How will progress be measured?
1. Help identify who is responsible for what areas on campus and what projects a BAP team member has responsibility for so others on campus know who to contact	Documented communication between team members and their supervisors.

2. The team will continue to grow their knowledge and expand their skill sets on all budget and planning and financial practices.	Progress measured through documented coaching sessions and evaluations.

PROGRAM REVIEW CATEGORY (IES):

Innovation/Technology

Goal 4.1: Training on Ad-Hoc Reporting/Querying Data

Action Steps and Timeline	Individual(s), committee or groups assigned.	2017-18	2018-19	2019-20	2020-21
1. B&P now has employed one staff member who works with CU System and OIT to provide querying needs for B&P office's campus constituents	Scott Reardon	February 2018	Ongoing	Ongoing	Ongoing
2. B&P to cross-train and provide necessary resources for all B&P office analysts to query data on common requests (e.g. monthly queries)	BAP Team	April 2018	Ongoing	Ongoing	Ongoing
3. Initiate Online Customer Service Survey to provide feedback on not only timeliness/accuracy of data requests from other depts, but feedback on all customer service provided to departments. Include links on both departmental website and B&P staff email signatures	Scott Reardon and BAP Team			November 2019	Ongoing
4. Formulate a tracking system on data requests that require ad-hoc querying (e.g. staff with FIN access are not able to seek the info they need on their own through FIN reports). Use the results of this to determine areas of strength and areas of room for improvement, and where additional training or resources may be required	Scott Reardon and BAP Team			January 2019	Ongoing

Outcomes	How will progress be measured?
1. Since the introduction of the new Elevate Finance & HR system, existing ad-hoc querying tools (e.g. Brio) no longer functioned. Querying of the Finance tables is required to pull source data for several monthly reports. In addition to this, financial assistants at UCCS, as well as CU System and the Board of Regents will request data that requires complex querying of tables. The projected outcome upon completion of this goal is for all B&P staff to have access to the resources to run regular queries, and to expedite more complex acute data requests, that currently can take a considerable amount of time and labor.	We will track completion of cross-training of staff and providing resources to run all Finance System ad-hoc queries. We will track Customer Service Survey data and develop a system that tracks the volume and category of query requests.

PROGRAM REVIEW CATEGORY (IES):

Customers/Stakeholders

Goal 6.1: Establish a formal feedback process

Action Steps and Timeline	Individual(s), committee or groups assigned.	2017-18	2018-19	2019-20	2020-21
1. Create a general survey and feedback form to put on our website	Scott Reardon and BAP Team		November 2019	Ongoing	Ongoing
2. Create a survey template to go along with our newsletters	Scott Reardon		November 2019	Ongoing	Ongoing
3. Implement surveys and feedback forms into monthly BAP processes and evaluate and apply feedback regularly	Scott Reardon and BAP Team		November 2019	Ongoing	Ongoing

Outcomes	How will progress be measured?
1. Use the provided feedback by our customers and stakeholders to review our processes and procedures to improve quality, make changes, and better serve our campus community.	Through this feedback our department will be able to take note of what processes have been changed. Once we have new or modified procedures, we can measure how successful they are by continuing to receive feedback about them.

PROGRAM REVIEW CATEGORY(IES):

Measurement/Analysis and Results

Goal 7.1: Share feedback and information that we receive from System

Action Steps and Timeline	Individual(s), committee or groups assigned.	2017-18	2018-19	2019-20	2020-21
1. Disseminate information and feedback received from System to BAP Team and the campus community.	Suzanne Scott and Rhea Taylor		January 2019	Ongoing	Ongoing
2. Relay vital information and feedback to campus through the Budget and Planning monthly newsletter.	Scott Reardon and BAP Team	February 2018	Ongoing	Ongoing	Ongoing

Outcomes	How will progress be measured?
1. We will have a more informed campus regarding System level budget topics.	The newsletter itself will be a document of proof showing a consistent relay of information to the campus.
2. A more engaged campus will translate to a more understanding campus when budget changes are made.	More acceptance from campus when budget changes are made which will mean a smoother transition to new practices and methods.

PROGRAM REVIEW CATEGORY (IES):

Measurement/Analysis and Results

Goal 7.2: Create a Work Order System to track in-progress and completed actions and projects.

Action Steps and Timeline	Individual(s), committee or groups assigned.	2017-18	2018-19	2019-20	2020-21
1. Ascertain an inexpensive system that will track, and record completed actions and projects	BAP Team		March 2019		
2. Implement new system to begin tracking action and project completion data	Scott Reardon		June 2019		

Outcomes	How will progress be measured?
1. Attain a better understanding of where time is being spent and find areas of improvement (time efficiency) regarding processes for actions or projects.	The system will monitor how long task was taken to complete or how many tasks where completed in certain categories