Program Summary

Task Force: We realize the brevity of this report is likely partially because Budget and Planning is such a new unit. However, we really appreciated that the goals were so focused and concise. By not over-reaching, hopefully the goals are more likely to be accomplished. Communication is critical in accomplishing your goals, and we look forward to seeing this communication happen with the campus. Thank you for providing your information to us.

Criterion: #1: Mission - How does your unit support the mission of the university? This may include your mission and vision statements. (no more than 200 words)

Question: Mission - How does your unit support the mission of the university? This may include your mission and vision statements. (no more than 200 words)

The mission of the IPFW Office of Budget and Planning is to provide fiscal budget and planning support to the IPFW community with timely and relevant financial information.

Criterion: #2: Accomplishments - Please list significant accomplishments from the last three years as they align with Plan 2020 goals

Question: I. Foster Student Success - Please list significant accomplishments from the last three years as they align with Plan 2020 goal area I: Foster student success.

N/A

Question: II. Creation of Knowledge - Please list significant accomplishments from the last three years as they align with Plan 2020 goal area II: Promote the Creation, Integration, and Application of Knowledge.

N/A

Question: III. Regional Hub - Please list significant accomplishments from the last three years as they align with Plan 2020 goal area III: Serve as a Regional Intellectual, Cultural, and Economic Hub for Global Competitiveness.

N/A

Question: IV. - Create a Stronger Univ - Please list significant accomplishments from the last three years as they align with Plan 2020 goal area IV: Create a Stronger University through Improving the Support of Stakeholders and the Quality and Efficiency of the Organization.
The creation of an IPFW Office of Budget and Planning, that reports directly to the Vice Chancellor of Financial/Administrative Affairs. This office is dedicated to the university budget and planning processes.

**Question:** Other Accomplishments - Please list any other significant accomplishments from the last three years that do not align with Plan 2020.

N/A

**Criterion:** #3: Accreditations - Program specific accreditation and status

**Question:** Accreditations - What program-specific accreditations and status do you have, if any?

N/A

**Question:** Constraints/Benefits - How do these accreditations constrain or benefit the work of your unit, if applicable?

N/A

**Criterion:** #4: Laws and Mandates - Federal and state laws or mandates that your unit addresses

**Question:** Federal and State Laws - What federal and/or state laws or mandates do you address, if any?

Budget is prepared in accordance with the appropriations and regulations set by the Indiana General Assembly and the Indiana Department of Higher Education. The timelines for budget and planning are influenced by the actions and directives of these state entities.

**Question:** Constraints/Benefits - How do these federal and state laws or mandates constrain or benefit the work of your unit?

N/A

**Criterion:** #5: Inefficiencies - Activities that you spend resources on inefficiently or in ways that do not support the mission.

**Question:** Inefficient use of resources - On what activities, if any, do you spend resources (money, time, people, etc.) inefficiently or in ways that do not support the mission of your unit or the university? List as many as apply.

None identified due to this being a newly created department.
**Criterion: #6: IR and Budget Review - Review of your department profile and budget**

**Question:** Contextualize IR data - Upon review of your IR Department Profile (for academic units) and FY 14-15 Budget information, are there any data you want to correct or contextualize? To view your profile or budget visit the Office of Institutional Effectiveness website: http://www.ipfw.edu/offices/ir/profiles/

None due to this being a newly created department.

**Criterion: #7: Goal One -** In this criterion, you will identify your unit goals and tell us how they align to Plan 2020, how they are measured, and what resources you need to meet them.

**Task Force:**
1. **Comment on the specificity of the goal:**

   Goal is very specific. Would like to see more detail on methods to be used to increase awareness, knowledge, and transparency of the budget process. For example, email newsletters, departmental meetings, training classes, information sessions, departmental liaisons, etc. How does UBC fit into this goal?

2. **Comment on the goal's measures:**

   Could use more specifics on how progress will be measured. For example, listing specific mechanisms for communication (above) would allow some numbers to be attached to each action item, such as "host x number of information sessions in the 2015 calendar year". Conducting periodic meetings with the University Business Managers seems more like an action plan and then the number of meeting the metric.

3. **Comment on the unit's ability to achieve the goal (include a consideration of the departmental profile and budget data):**

   The unit should be able to achieve this goal by 2020 if not before.

4. **Comment on the goal's relevance:**

   This is very, very relevant goal.

5. **Comment on the timeline of the goal:**

   Ongoing, but timelines could be specified if more specific action items were given.

   Possible opportunities for collaboration or suggestions for addressing a gap:

   Collaboration: UBC, USAP, Business Managers…

**Question:** Unit Goal - What is your unit goal?

Increase the university community's knowledge of the budget process.
**Question:** IPFW Goal - What 2020 goal(s) does this unit goal align with? List as many as apply. If it does not align, you may write “NA” or clarify.

IV.B.5 Continue increasing transparency in resource allocation budget formation and administration, and personnel decisions.

IV Create a stronger university through improving the support of stakeholders and the quality and efficiency of the organization.

**Question:** Priority Level - Is the unit goal high, medium, or low priority? Limit your high-priority unit goals to 3 to 5.

High

**Question:** Actions - What action(s) does your unit plan to take to support this unit goal?

Interact with USAP and the university community to broaden their knowledge of the budget processes and provide timely and accurate financial data to assist in strategic decision making.

**Question:** Metrics - With what metrics will you assess progress toward accomplishing this unit goal on an annual basis?

IV.B.5 Continue increasing transparency in resource allocation budget formation and administration, and personnel decisions. Conduct periodic meetings with the University Business Managers to assess respective units understanding of the budget process.

**Question:** Resources - Are you able to accomplish this unit goal with your current resources?

Yes

**Question:** Needed Resources - If you don’t have enough resources, what additional resources do you need to accomplish this unit goal?

N/A

**Question:** Challenges - What challenges, other than financial resources, might affect your progress toward accomplishing this unit goal?

The budget process is constantly changing due to external changes (i.e. funding and regulations) as well as internal changes (changes to the IPFW university community). The challenge is to keep the university community informed of these factors affecting the university's budget and budget process.

**Question:** Timeline - If achieving this unit goal will take longer than one year, what is your timeline for implementing and accomplishing it?

Yes as this is an ongoing process that will require an annual review and adjust the process as necessary.
**Criterion:** #8: Goal Two - In this criterion, you will identify your unit goals and tell us how they align to Plan 2020, how they are measured, and what resources you need to meet them.

**Task Force:**

1. Comment on the specificity of the goal:
   
   Very specific and narrow focus, which is appreciated.

2. Comment on the goal's measures:

   Goals measures are very specific – might suggest adding the possibility of a feedback form/survey for stakeholders receiving the various reports to measure format, usefulness, data needs, etc.

3. Comment on the unit's ability to achieve the goal (include a consideration of the departmental profile and budget data):

   The goal seem very obtainable.

4. Comment on the goal's relevance:

   Extremely relevant.

5. Comment on the timeline of the goal:

   Seems very realistic.

Possible opportunities for collaboration or suggestions for addressing a gap:

Is there any opportunity to get some of what we need (reports from SAP) from PUWL? Or do they have someone who could cross-train us? Could business managers be given the opportunity to easily run the reports on their own to free up personnel in Budget office?

**Question:** Unit Goal - What is your unit goal?

Provide units with accurate budget data which will assist in dedicating financial resources in an efficient manner.

**Question:** IPFW Goal - What 2020 goal(s) does this unit goal align with? List as many as apply. If it does not align, you may write “NA” or clarify.

IV.A.2 Establish an integrated system of program report, review, assessment and accreditation that is aligned to performance metrics.

**Question:** Priority Level - Is the unit goal high, medium, or low priority? Limit your high-priority unit goals to 3 to 5.

High

**Question:** Actions - What action(s) does your unit plan to take to support this unit goal?
Create periodic reports for units that measures current fiscal year budget to current fiscal year expenses.

**Question:** Metrics - With what metrics will you assess progress toward accomplishing this unit goal on an annual basis?

What new reports have been created?

Are they being distributed to stakeholder on a periodic basis?

**Question:** Resources - Are you able to accomplish this unit goal with your current resources?

May require additional training in report writing in SAP.

**Question:** Needed Resources - If you don’t have enough resources, what additional resources do you need to accomplish this unit goal?

N/A

**Question:** Challenges - What challenges, other than financial resources, might affect your progress toward accomplishing this unit goal?

Working with the the data available in SAP to generate "user friendly" reports to measure current fiscal year activity.

**Question:** Timeline - If achieving this unit goal will take longer than one year, what is your timeline for implementing and accomplishing it?

Could take up to two years to incude all funding sources.

**Criterion:** #9: Goal Three - In this criterion, you will identify your unit goals and tell us how they align to Plan 2020, how they are measured, and what resources you need to meet them.

**Question:** Unit Goal - What is your unit goal?

**Question:** IPFW Goal - What 2020 goal(s) does this unit goal align with? List as many as apply. If it does not align, you may write “NA” or clarify.

**Question:** Priority Level - Is the unit goal high, medium, or low priority? Limit your high-priority unit goals to 3 to 5.
Question: Actions - What action(s) does your unit plan to take to support this unit goal?

Question: Metrics - With what metrics will you assess progress toward accomplishing this unit goal on an annual basis?

Question: Resources - Are you able to accomplish this unit goal with your current resources?

Question: Needed Resources - If you don’t have enough resources, what additional resources do you need to accomplish this unit goal?

Question: Challenges - What challenges, other than financial resources, might affect your progress toward accomplishing this unit goal?

Question: Timeline - If achieving this unit goal will take longer than one year, what is your timeline for implementing and accomplishing it?

Criterion: #10: Goal Four - In this criterion, you will identify your unit goals and tell us how they align to Plan 2020, how they are measured, and what resources you need to meet them.

Question: Unit Goal - What is your unit goal?

Question: IPFW Goal - What 2020 goal(s) does this unit goal align with? List as many as apply. If it does not align, you may write “NA” or clarify.

Question: Priority Level - Is the unit goal high, medium, or low priority? Limit your high-priority unit goals to 3 to 5.

Question: Actions - What action(s) does your unit plan to take to support this unit goal?
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Metrics - With what metrics will you assess progress toward accomplishing this unit goal on an annual basis?

**Question:** Resources - Are you able to accomplish this unit goal with your current resources?

**Question:** Needed Resources - If you don’t have enough resources, what additional resources do you need to accomplish this unit goal?

**Question:** Challenges - What challenges, other than financial resources, might affect your progress toward accomplishing this unit goal?

**Question:** Timeline - If achieving this unit goal will take longer than one year, what is your timeline for implementing and accomplishing it?

**Criterion:** #11: Goal Five - In this criterion, you will identify your unit goals and tell us how they align to Plan 2020, how they are measured, and what resources you need to meet them.

**Question:** Unit Goal - What is your unit goal?

**Question:** IPFW Goal - What 2020 goal(s) does this unit goal align with? List as many as apply. If it does not align, you may write “NA” or clarify.

**Question:** Priority Level - Is the unit goal high, medium, or low priority? Limit your high-priority unit goals to 3 to 5.

**Question:** Actions - What action(s) does your unit plan to take to support this unit goal?

**Question:** Metrics - With what metrics will you assess progress toward accomplishing this unit goal on an annual basis?

**Question:** Resources - Are you able to accomplish this unit goal with your current resources?
**Question:** Needed Resources - If you don’t have enough resources, what additional resources do you need to accomplish this unit goal?

**Question:** Challenges - What challenges, other than financial resources, might affect your progress toward accomplishing this unit goal?

**Question:** Timeline - If achieving this unit goal will take longer than one year, what is your timeline for implementing and accomplishing it?

**Criterion:** #12: Goal Six - In this criterion, you will identify your unit goals and tell us how they align to Plan 2020, how they are measured, and what resources you need to meet them.

**Question:** Unit Goal - What is your unit goal?

**Question:** IPFW Goal - What 2020 goal(s) does this unit goal align with? List as many as apply. If it does not align, you may write “NA” or clarify.

**Question:** Priority Level - Is the unit goal high, medium, or low priority? Limit your high-priority unit goals to 3 to 5.

**Question:** Actions - What action(s) does your unit plan to take to support this unit goal?

**Question:** Metrics - With what metrics will you assess progress toward accomplishing this unit goal on an annual basis?

**Question:** Resources - Are you able to accomplish this unit goal with your current resources?

**Question:** Needed Resources - If you don’t have enough resources, what additional resources do you need to accomplish this unit goal?
Question: Challenges - What challenges, other than financial resources, might affect your progress toward accomplishing this unit goal?

Question: Timeline - If achieving this unit goal will take longer than one year, what is your timeline for implementing and accomplishing it?

Criterion: #13: Goal Seven - In this criterion, you will identify your unit goals and tell us how they align to Plan 2020, how they are measured, and what resources you need to meet them.

Question: Unit Goal - What is your unit goal?

Question: IPFW Goal - What 2020 goal(s) does this unit goal align with? List as many as apply. If it does not align, you may write "NA" or clarify.

Question: Priority Level - Is the unit goal high, medium, or low priority? Limit your high-priority unit goals to 3 to 5.

Question: Actions - What action(s) does your unit plan to take to support this unit goal?

Question: Metrics - With what metrics will you assess progress toward accomplishing this unit goal on an annual basis?

Question: Resources - Are you able to accomplish this unit goal with your current resources?

Question: Needed Resources - If you don't have enough resources, what additional resources do you need to accomplish this unit goal?

Question: Challenges - What challenges, other than financial resources, might affect your progress toward accomplishing this unit goal?
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Timeline - If achieving this unit goal will take longer than one year, what is your timeline for implementing and accomplishing it?

Criterion: #14: Goal Eight - In this criterion, you will identify your unit goals and tell us how they align to Plan 2020, how they are measured, and what resources you need to meet them.

Question: Unit Goal - What is your unit goal?

Question: IPFW Goal - What 2020 goal(s) does this unit goal align with? List as many as apply. If it does not align, you may write “NA” or clarify.

Question: Priority Level - Is the unit goal high, medium, or low priority? Limit your high-priority unit goals to 3 to 5.

Question: Actions - What action(s) does your unit plan to take to support this unit goal?

Question: Metrics - With what metrics will you assess progress toward accomplishing this unit goal on an annual basis?

Question: Resources - Are you able to accomplish this unit goal with your current resources?

Question: Needed Resources - If you don’t have enough resources, what additional resources do you need to accomplish this unit goal?

Question: Challenges - What challenges, other than financial resources, might affect your progress toward accomplishing this unit goal?

Question: Timeline - If achieving this unit goal will take longer than one year, what is your timeline for implementing and accomplishing it?
#15: Goal Nine - In this criterion, you will identify your unit goals and tell us how they align to Plan 2020, how they are measured, and what resources you need to meet them.

**Question:** Unit Goal - What is your unit goal?

**Question:** IPFW Goal - What 2020 goal(s) does this unit goal align with? List as many as apply. If it does not align, you may write "NA" or clarify.

**Question:** Priority Level - Is the unit goal high, medium, or low priority? Limit your high-priority unit goals to 3 to 5.

**Question:** Actions - What action(s) does your unit plan to take to support this unit goal?

**Question:** Metrics - With what metrics will you assess progress toward accomplishing this unit goal on an annual basis?

**Question:** Resources - Are you able to accomplish this unit goal with your current resources?

**Question:** Needed Resources - If you don’t have enough resources, what additional resources do you need to accomplish this unit goal?

**Question:** Challenges - What challenges, other than financial resources, might affect your progress toward accomplishing this unit goal?

**Question:** Timeline - If achieving this unit goal will take longer than one year, what is your timeline for implementing and accomplishing it?

#16: Goal Ten - In this criterion, you will identify your unit goals and tell us how they align to Plan 2020, how they are measured, and what resources you need to meet them.

**Criterion:**
Question: Unit Goal - What is your unit goal?

Question: IPFW Goal - What 2020 goal(s) does this unit goal align with? List as many as apply. If it does not align, you may write “NA” or clarify.

Question: Priority Level - Is the unit goal high, medium, or low priority? Limit your high-priority unit goals to 3 to 5.

Question: Actions - What action(s) does your unit plan to take to support this unit goal?

Question: Metrics - With what metrics will you assess progress toward accomplishing this unit goal on an annual basis?

Question: Resources - Are you able to accomplish this unit goal with your current resources?

Question: Needed Resources - If you don’t have enough resources, what additional resources do you need to accomplish this unit goal?

Question: Challenges - What challenges, other than financial resources, might affect your progress toward accomplishing this unit goal?

Question: Timeline - If achieving this unit goal will take longer than one year, what is your timeline for implementing and accomplishing it?