

Business Affairs Committee
Integration of Planning, Budgeting and
Accountability

Task Force Recommendation



UNIVERSITY *of* NORTH CAROLINA WILMINGTON

Task Force Members

Cross-Campus Representation

Denise Battles	Provost and Vice Chancellor Academic Affairs, Co-Chair
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Michael Drummond	Board of Trustees
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Task Force Members

Cross-Campus Representation

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Recommendations

The development and timely implementation of a *comprehensive and coordinated planning, budgeting, and accountability system*, based on extensive participation, openness, pragmatism, and clarity

- Creation of an executive level integrated planning and budget infrastructure
- Infrastructure should facilitate discussion and collection, analysis and dissemination of available data
- Infrastructure should assist in the articulation of metrics, dissemination of information and recommendations through membership, frequent and regular communications and open meetings

Recommendations

Implementation of changes in the *planning process* so that key campus constituencies are engaged in shaping strategic initiatives and programmatic directions

- A Planning Officer should be installed and assigned responsibility for ensuring successful integration of all aspects of the PBA process
- The planning process should identify strategies that distinguish UNCW and be nimble enough to changing environmental factors
- UNCW's new leadership is advised to engage in a continuous listening tour to learn about the points of pride, areas of need, and hopes for the future within each unit on campus and should recognize the substance of the action items identified in the Strategic Action Plan
- Planning should be inclusive and balanced and integrated with budget and assessment; resource allocation aligned with priorities; and, accountability and outcome assessment tracked through reports and metrics

Recommendations

Implementation of changes in the *budgeting process* so that it aligns with state, campus, and unit plans and requirements, including the appropriate roles for administration and the Board of Trustees

- Simplify the resource allocation process to create more transparency, understanding and financial flexibility
- Develop standardized set of clear and consistent financial reporting
- Enhance campus communication by creating face to face and virtual methods and modes of communication to explain budgetary processes, metrics, and decisions
- Identify and communicate clear strategic objectives and parameters early in the budgetary process; use more transparent and methodical processes to build trust and promote effective management
- Determine the best levels to make budgeting decisions that allow the university to be nimble; respond to challenges, needs and opportunities; and reflect our core values

Recommendations

Strategies for *measuring outcomes* and their use in the recommended planning and budgeting processes, including the appropriate role of analytics

- Continue use of existing university-wide and system-level reporting metrics
- Balance the augmentation of existing metrics with locally owned management reports and select accountability metrics and common dashboard reports
- Inform metrics by local units, vetted by leadership teams and mapped to strategic priorities
- The process for accountability should incorporate common data sets