Business Affairs Committee

Integration of Planning, Budgeting and Accountability

Task Force Recommendation
Task Force Members
Cross-Campus Representation

Denise Battles  Provost and Vice Chancellor Academic Affairs, Co-Chair
Rick Whitfield  Vice Chancellor Business Affairs, Co-Chair
Rob Burrus  Interim Dean Cameron School of Business
Raymond Burt  Professor, Foreign Languages and Literatures
Steffaney Cohen  Associate Director Institutional Research and Assessment
Michael Drummond  Board of Trustees
Dana Harris  Senior Associate Athletic Director for Internal Operations
Matt Herrington  Associate Director of Business Services Housing and Residence Life
Cindy Hucks  Interim Director of Budgets Budget Office
David Mautz  Chair, Department of Accountancy and Business Law
Lori Messinger  Professor & Director of Social Work, College of Health & Human Services
Chair Faculty Senate Budget Committee

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Task Force Members
Cross-Campus Representation

David Ulaszek  Assistant Vice Chancellor for Resource Management, Academic Affairs
Brad Walker  Associate Professor, Watson College of Education
Sarah Watstein  University Librarian

Other Participants:
Andrew Laws  Huron Education Managing Director
Pat Leonard  Vice Chancellor-Student Affairs
Russ McBrayer  Institutional Research Analyst
Steve Meinhold  Professor, Public and International Affairs & President Elect-Faculty Senate
Nancy Spirakis  Business Project Manager, Business Affairs

Task Force Staff:
Lynn Aycock  Executive Assistant, Business Affairs
April Morey Query  Doctoral Student, Watson College of Education
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