Strategic Plan
2013-2017

PBA 2013-2014
The Division of Planning, Budget, and Human Resources supports sustained fulfillment of UVU’s mission by providing key services, resources, information, and analysis to the university community and its stakeholders. We foster a culture of informed planning, assessment, innovation, and accountability to maximize individual and organizational success.
Objectives

1. Provide timely, accessible, and understandable data, information, and analysis
2. Foster evidence-based decision-making in an environment of transparency and collaboration
3. Develop and model professional excellence through efficient, effective, and innovative programs, services, and practices
4. Cultivate a work environment based on integrity, respect, and inclusion which attracts, develops, rewards, and retains high quality faculty and staff
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Key Goals
2013-17

Provide timely, accessible, and understandable data, information, and analysis

• Improve employee communication and leverage technology to more effectively and transparently provide employees access to information

• Implement BI Finance tool to improve accessibility to and distribution of a variety of financial reports and visualizations to budget managers and leaders

• Expand use of existing reporting tools and implement Tableau Server in coordination with Utah Data Alliance
Foster evidence-based decision-making in an environment of transparency and collaboration

• Collaborate with Academic Affairs in the development and pilot of academic program review data, information, and dashboards

• Support successful completion of the first year of UVU’s campus-wide, rolling four-year strategic planning; facilitate transition to annual strategic plan update
Develop and model professional excellence through efficient, effective, and innovative programs, services, and practices

- Implement project management strategies and tools to ensure successful and timely project completion
- Complete and submit the Year Three Report to NWCCU (due September 2014) utilizing Insight; facilitate a successful Year Three Evaluation
Cultivate a work environment based on integrity, respect, and inclusion which attracts, develops, rewards, and retains high quality faculty and staff.

- Establish and implement compensation philosophy, strategies, and practices to attract, recognize, reward, and retain a highly qualified and diverse workforce.
- Ensure all employees, including underrepresented populations, have equal access to and can fully participate in all aspects of the university’s workplace programs and services.
Great people. Great passion. Great purpose.
“As we started learning more and more about our son’s diagnosis and treatment, I was overwhelmed with what seemed like an inevitable mountain of future expenses. When we started receiving bills from Primary Children’s, I was shocked at the level of coverage we had for our family. This experience has been extremely trying for our family. The benefit offerings at UVU have taken what could have been an additional stress and turned it into a great comfort.”

- Andrew Stone, Director of Admissions
Vision & Mission Statements

Vision Statement
Human Resources serves as a strategic partner supporting Utah Valley University as an employer of choice by attracting, sustaining, and inspiring great people, with great passion, working for a great purpose.

Mission Statement
Human Resources advances workplace solutions and services through leadership, excellence, innovation, and engagement, to enrich the work and learning environment for our faculty, staff and students.
Strategic Objectives

1. **LEADERSHIP**: Create value by enhancing workforce effectiveness at all levels of the University.

2. **EXCELLENCE**: Foster a culture of excellence that embraces inclusion and equitable practices.

3. **INNOVATION**: Enhance HR service delivery capabilities and alignment by adapting, standardizing, and streamlining essential processes, procedures, and communication.

4. **ENGAGEMENT**: Develop and maintain collaborative partnerships that further the University’s mission and objectives.
Objective 1
LEADERSHIP: Create value by enhancing workforce effectiveness at all levels of the University.

Goals:

• Provide market-competitive compensation and benefit programs to attract, retain, develop and reward a highly qualified and diverse workforce.

• Implement benefit plan design strategies that promote engagement, encourage wellness and healthy behaviors, and recognize the needs of a dynamic workforce.

• Implement meaningful performance management systems and recognition programs to drive organizational results, recognize high performance among employees, and value employee contributions.

• Deliver professional development programs to integrate UVU’s core competencies to improve leadership capabilities, job skills, and employee productivity.

• Provide management strategies and implementation support promoting workforce flexibility to optimize productivity.
Resource request on behalf of the University to support HR Objective 1

University Compensation Equity Initiative

- Implement year two of the University Compensation Equity Initiative
  - Address employee morale issues
  - Promote internal equity and consistency across diverse University functions
  - Encourage wages, salaries, and benefits which are competitive with the prevailing rates for similar employment in relevant labor markets.

- Total Request
  $1,000,000 (ongoing)

University Compensation Initiative - Merit|Key Retention Pay

- Provide Funding for Merit|Key Retention
  - Attract, develop, retain, and reward high quality employees at all levels of responsibility
  - Provide a foundation for an ongoing performance-based pay system.

- Total Request
  $1,000,000(ongoing)
HR Compensation Area Alignment

- Hire a Full-time Compensation Manager
  - Support the University's compensation philosophy and strategy
  - Increase depth of compensation area expertise in HR to effectively support the University in achieving its compensation objectives.

Employee Appreciation Program Funding

- Focus additional resources to employee appreciation to create a more robust and inclusive appreciation program with increased offerings throughout the year.

- Total Request $90,207 (ongoing)
- Total Request $20,000 (ongoing)
Objective 2
EXCELLENCE: Foster a culture of excellence that embraces inclusion and equitable practices.

Goals:

• Develop plans to promote inclusion and cultural competency with all employee groups across all University programs.

• Ensure that all members of our campus community, including acknowledged underrepresented populations, have equal access to, and can fully participate in, all aspects of the work and learning environment in compliance with University policies, best practices, and laws.

• Compete for top talent with effective recruitment strategies and efficient recruitment processes.

• Encourage an ethical and respectful work environment that promotes trust, fairness, confidentiality, and accountability.
Hire a University Equity Officer

- Equity Officer is responsible for monitoring and ensuring that the University's policies and programs are in compliance with federal and state statutory and regulatory requirements relating to Equal Opportunity and Equity issues.
- Current functions are spread over several divisions with a high potential for inconsistency and decreased accountability.
- Centralizing this function will create better alignment with the University's commitment to inclusion and provide greater clarity for students and employees.

- Total Request
  $129,110 (ongoing)
As the rate of hiring at UVU increases due to increasing turnover rates, new positions added, etc., the current budget ($31,000) does not sufficiently support the required background checks on applicants. Vendor prices, as well as ancillary charges, have also increased over time.

**Total Request**

$20,000 (ongoing)
Objective 3

INNOVATION: Enhance HR service delivery capabilities and alignment by adapting, standardizing, and streamlining essential processes, procedures, and communication.

Goals:

- Implement redesigned business processes, additional self-service, improved workflow and common data definitions to replace paper forms and manual processes so that work can be shifted from transactional to strategic and compliance priorities.

- Develop an HR scorecard and establish report metrics to influence and inform strategic decision-making and workforce planning.

- Target employee communications and leverage technology to more effectively meet employee information needs and access.

- Secure and maintain appropriate workspaces to provide improved service and program delivery.

- Invest in human resources team members’ productivity and effectiveness by supporting professional development experiences and continuing education.
The Northwest Commission on Colleges and Universities standards state “The institution provides faculty, staff, administrators, and other employees with appropriate opportunities and support for professional growth and development to enhance their effectiveness in fulfilling their roles, duties, and responsibilities.”

The HR Conference room has become an inefficient venue for training programs due to size and location.

A best practice in human capital management is to have a robust training and professional development program for all employees. Dedicated training space is critical to offering a sustainable training program.

Use of BA207 will provide HR ease and convenience in offering training to employees and enable the department to increase its training and development offerings for our employees.

**BA207 Shared Use for Employee Training Room Space**

- Designate BA207 from Noon to 6:00 p.m., daily, for HR training use (short-term)
- Identify appropriate training space available 8-5 each weekday (long-term)
Objective 4

ENGAGEMENT: Develop and maintain collaborative partnerships that further the University’s mission and objectives.

Goals:

- Use cross-functional teams to enhance organization decision-making.
- Form internal and external relationships that foster collaboration across boundaries and benefit organizational needs.
- Promote strategic initiatives that provide a consistent, positive image, and awareness of the department, division, and institution.
- Engage with the University’s shared governance entities to enhance decision-making with all segments of the University.
Great People. Great Passion. Great Purpose.

“My job enables me to assist students in obtaining their goal of gaining a higher education.”
– Trish Howard, Financial Aid

“UVU’s inclusiveness is a great service to the young people in this community, and it does not affect the way I teach. In fact, a great number of students I’ve taught over the last 10 years could have attended universities like UC Berkeley, so these students are amazing.”
– Calvin Bond, Chemistry Professor

“I work really hard to make sure the best is available for the students so they can concentrate on learning. The people I work with on a daily basis are all focused on student success. We are all working toward that same goal.”
– Brett McKeachnie, IT Systems Administration
Great people. Great passion. Great purpose.
Budget Office

Mission Statement

The Budget Office ensures short-term financial solvency and long-term financial stability by providing accurate and timely revenue forecasting, resource planning and review, and budget information. The Budget Office maintains cooperative work relationships with University leaders, faculty, staff, and students, Commissioner's Office, Legislative Fiscal Analyst, and the community at large.
1. Cooperative Relationships
Maintain cooperative work relationships with the university community, government officials, and the community at large.

2. Process Improvement
Continually improve processes and procedures by documenting and eliminating redundant activities to generate more benefit for the University.

3. Quality Information
Sustain a standard of quality through production of accurate reports in a timely manner.

4. Implementation/Application
Help implement and execute new and existing budgeting processes with all entities within the university.
• Quality Information
  • Develop an annual budget-to-expense variance report to improve the accuracy of operating budget
  • In collaboration with Finance & Business Services, implement automated budget and finance reports for budget managers and decision-makers

• Process Improvement
  • Produce tuition modeling options consistent with UVU’s mission and programmatic needs
  • Develop an internal manual for budget office processes and reports

• Cooperative Relationships
  • Expand annual operating budget book to include more non-appropriated entities
Budget Office resource request to support Quality Information Objective

- Improve Accessibility to and Distribution of Financial Reports and Visualizations (Collaborative Initiative with Finance & Business Services)
  - Identify a business intelligence/reporting tool
  - Tool will provide
    - Ease of use for report/visualization developers
    - Out-of-the-box templates/reports that are easily understood by budget managers
    - Multiple distribution methods including mobile devices
    - Numerical and graphical information

- Request (one-time)
  $55,000 (estimated cost = $100,000; $45,000 funded internally)
Mission Statement

To advance Utah Valley University’s shared governance model, the Policy Office makes policies accessible to the campus community, makes the policy development process efficient and transparent, and fosters collaboration by engaging key stakeholders from all parts of the university community.
1. Provide a comprehensive, timely, and relevant set of policies that cover key aspects of university life to protect and support students, staff, faculty, and university resources. Policies are designed to bring the University into compliance with state and federal law and best practices in higher education.

2. Provide administrative support to the policy development process, assisting sponsors and stewards with draft development and review in such a way that the process remains transparent and aligned with UVU’s share governance model. The Policy Office catalogs, archives, and maps university policy.

3. Provide editorial support to sponsors and stewards to provide clarity and readability in university policy and a cohesive voice to policy. Train stewards and sponsors in the policy process to help them understand it so that they perform their role to the fullest.

4. Provide technical support to the policy process by managing the Policy Office SharePoint site, Policy Office web pages, TOPS (The Online Policy System), and PolicyTech approval workflow software.
· Complete transition to TOPS 2.0 to improve policy approval functionality and present all policies in an updated, standardized format
· Complete redesign of website
· Implement Policy Tech system
· Revisit policy study that identified policy gaps and, in collaboration with sponsors, develop a plan for a more comprehensive set of policies
· Develop an online training site
Mission Statement

IRI provides information management and analysis to assist planning, measurement, and evaluation of the mission and goals of UVU and its communities.

Values

- Information Integrity
- Information Accessibility
- Information Applicability
- Professionalism
Institutional Research & Information Objectives

Survey, Evaluation, and Research
IRI collaborates, facilitates, and conducts survey, evaluation, and research activities for and with administration, staff, faculty, and students

Monitoring Institutional Mission
IRI assists in monitoring progress toward the accomplishment of institutional core themes, administrative imperatives, and their related objectives. By extension, IRI supports accreditation, program review, and other self-study efforts.

Official Reporting & Data Management
IRI oversees official institutional reporting and serves as a custodian and clearinghouse of institutional data

Supporting Decision-makers
IRI provides information for decision and planning support which both responds to and anticipated the needs of institutional leaders.

Build and Maintain Organizational Capacity
IRI enhances the fulfillment of its mission, objectives, and values through the strategic development of human resources and organizational capacity
Institutional Research & Information
Key Goals/Action Steps
2013-2017

- **Survey, Evaluation and Research**
  - Collaborate with Academic Affairs and Student Affairs in the identification of key metrics to monitor the fulfillment of Our Unique Educational Mission and the impact of related policies such as structured enrollment
  - Collaborate with Academic Affairs in the development and pilot of academic program review data, information, and dashboards
  - Conduct bi-annual Great Colleges to Work For Survey

- **Monitoring Institutional Mission**
  - Finalize missing core themes indicators
  - Establish system to maintain measures
Institutional Research & Information
Key Goals/Action Steps
2013-2017

- **Official Reporting & Data Management**
  - Collaborate with business process owners to identify processes that create data errors and plan solutions
  - Develop error checking scripts
  - Automate 3rd week and IPEDS reports

- **Supporting Decision-makers**
  - Provide information and dashboards (Business Intelligence) that are understandable for the audience and simple within their context
  - Increase use of Tableau
  - Develop and implement standard “look & feel” guidelines for reports and website
  - Reduce jargon
• Build and Maintain Organizational Capacity
  • Training—compliance, technology, presentations, reports
  • Implement project management strategies and tools to ensure successful and timely project completion
  • Engage students in meaningful internships
  • Insure project relevance; review existing data collection, survey, reports, and projects to ensure value and relevance; eliminate no-to-low value projects
Great Colleges to Work For Survey
- In 2012, UVU participated in the Chronicle of Higher Education/Modern Think “Great Colleges to Work For” survey. Data from this survey support UVU’s Core Themes and Administrative Imperatives and provides valuable insight into employee opinion of UVU’s processes, campus climate, and compensation.

Request (one-time)
$7,500
Part-time student intern in Assessment Support, Analysis & Survey Research

- UVU has an increasing need for assessment information. Current projects require development and piloting of a number of new assessments. Assessment of accomplishment of four-year plans may also expand demand for assessment data and survey research.

Request (base) $22,901
Mission Statement
The Department of Institutional Effectiveness and Planning facilitates a climate of improvement, innovation, and sustainability through ongoing, integrated, institution-wide planning and evaluation processes that supports Utah Valley University’s mission fulfillment.
Culture of Planning/Assessment

Foster a culture of innovation, improvement, and sustainability through effective support of planning and assessment efforts at all levels of the institution.

Regional Accreditation

Manage timelines, processes, data, and narratives related to University accreditation and support stakeholders in providing accreditation responses.

Future Trends

Stay abreast of trends in higher education in support of planning and the potential opportunities or threats for UVU.
Institutional Effectiveness & Planning Key Goals 2013-2017

- **Culture of Planning/Assessment**
  - Produce a definitive planning document
  - Support the Inclusive Initiative

- **Regional Accreditation**
  - Draft/finalize the year three NWCCU report and prepare for future reports
  - Reporting on substantive/minor changes

- **Future Trends**
  - Systematically assess future trends in higher education
Implement a communication/training strategy to help all departments to be aligned in terms of planning & assessment including:

- Update UVU Planning Guide and online course
- Refine Insight to be consistent with Planning Guide
- Offer immediate support for Insight users

The part-time administrative assistant also supports the Director of Academic Assessment and Program Review.

Request (base, convert part-time to full-time) $38,300
Planning, Budget & Human Resources
Four-Year Plan (Objectives, Goals, and Action Steps)
2013-17
Choose a goal and begin to move toward it. By multiplying tiny pieces of time with increments of daily effort, we can accomplish magnificent things.

The Daffodil Principle, Jaroldeen Asplund Edwards