PBA
2014-2015

Vice President Linda Makin
Mission Statement

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
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

Objectives in Relation to Core Themes

Operate Effectively 1: UVU fosters a culture of planning, assessment, improvement & accountability

Operate Effectively 3: UVU utilizes transparent and collaborative decision-making processes

Serious 4: UVU is recognized for high quality, efficient & effective programs & services

Serious 3: UVU attracts, develops, and retains high achieving students and highly qualified faculty, staff, and administrators

Inclusive 2: UVU provides an inviting, supportive environment & a balance of activities & services for people from a wide variety of backgrounds and perspectives
Key Goals
2014-17

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
Key Goals 2014-17

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
Key Divisional Requests
Great people. Great passion. Great purpose.

Mark Wiesenberg
Associate VP HR

Judy Martindale
Director, Benefits / Compensation

Colby Callahan
Director, HRIS / Records

Kurt Ashworth
Director, Employment Services
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.
HR PBA Request Summary

University Requests

- University Compensation Equity Initiative
- University Compensation Initiative - Merit\Key Retention Pay
- Increase to PT/Adjunct Hourly Budgets

HR Requests

- HR Business Partner for Academic Affairs
- Manager of Employee Learning & Development
- HR Business Systems Analyst
- Increase to HR Hourly Budget
HR PBA Request on behalf of the University and in support of HR Objective 1

University Compensation Equity Initiative

- Implement year three of the University Compensation Equity Initiative.
- To encourage wages, salaries, and benefits which are competitive with the prevailing rates for similar employment in relevant labor markets.
- To help address employee morale issues.
- To promote internal equity and consistency across diverse University functions.

- **Total Request**
  - $2,060,000 (ongoing)
University Compensation Initiative - Merit\Key Retention Pay

- Provide Funding for Merit\Key Retention.
- To support the Presidential priority of compensation.
- To attract, develop, retain, and reward high quality employees at all levels of responsibility.
- To provide a foundation for a ongoing performance-based pay system.

- **Total Request**
  - $2,000,000 (ongoing)
HR PBA
Request on behalf of the University and in support of HR Objective 1

Increase to PT/Adjunct Hourly Budgets

- Provide Funding for Merit/Key Retention.
- To support the Presidential priority of compensation.
- To attract, develop, retain, and reward high quality employees at all levels of responsibility.
- To operate effectively and attract and retain quality part-time staff and adjunct faculty.

- Total Request
  - $757,782 (ongoing)
As the University continues to increase its Faculty FTE, Human Resources has become more involved in employment issues in this area.

A full-time Human Resources Business Partner for Academic Affairs would be embedded in the Senior Vice President for Academic Affairs’ suite and report to the Associate Vice President of Human Resources with a co-report (dotted-line) to the Associate Vice President for Academic Affairs.

The embedded position would support academic affairs with human resources knowledge and expertise particularly in the areas of compensation, employee relations, and recruitment.

This position will help HR better allocate increased workloads in order to operate more effectively.

**Total Request**

- $104,047 (ongoing)

Goal Name: Develop and maintain collaborative partnerships that further the University’s mission and objectives.
HR PBA Request to support HR Objective 3

Manager of Employee Learning & Development

- HR experiencing increased requests from across campus to provide trainings such as Crucial Conversations, HR Academy, and help facilitate Title IX Compliance training, Discrimination Prevention, and others.

- Additional increase in compliance training requirements for student employees, faculty, and staff.

- Current business demands vs. staffing levels in HR only allow for part-time attention to be devoted to training 5,000+ employees.

- Goal to leverage technology to more effectively meet employees’ training needs, through a Learning Management System, requires a position devoted entirely to Employee Learning & Development.

- Total Request
  - $89,276 (ongoing)
HR Business Systems Analyst

- The Business Systems Analyst will help with employee reporting for business intelligence initiatives focused on planning and assessment.
- This position will also be responsible for the HR website making sure content is up-to-date, relevant and presented in an intuitive manner so administration and employees can easily access important information.
- Increased requests from across campus to provide HR data for more effective decision making and comply with federal, state, and other regulatory requirements.

- **Total Request**
  - $85,996 (ongoing)
HR PBA Request to support HR Objective 3

Increase to HR Hourly Budget

• Growth in demand for services and outreach to the University community is difficult to effectively manage with current staffing levels in HR.

• In order to operate effectively, this funding will help HR better allocate increased workloads in order to operate more effectively.

• Total Request
  • $21,400 (ongoing)
HR PBA Request Summary

University Requests
- University Compensation Equity Initiative
- University Compensation Initiative - Merit\Key Retention Pay
- Increase to PT/Adjunct Hourly Budgets

HR Requests
- HR Business Partner for Academic Affairs
- Manager of Employee Learning & Development
- HR Business Systems Analyst
- Increase to HR Hourly Budget
Great people. Great passion. Great purpose.
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.
Objectives

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.

Budget Office
Budget Office Key Goals 2013-2017

- **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
“UVU strategically allocates resources to achieve institutional objectives”

Operate Effectively

2

UVU strategically allocates resources to achieve institutional objectives

Triple III Funding

- Shift initiatives off of Institutional Interest funding to appropriated funding.

With the decline in institutional interest funds we need to shift initiatives off of triple I funding to appropriated funding. The initiatives that will be shifted will include the following: the scholarship ball, student marketing (recruitment & targeted), Wasatch marketing, and bank fees.

Request (base)

$166,000

Budget Office

Goal Name: Process Improvement
Budget Office Hourly Staff

UVU's appropriated budget increased 16.75% from $164,966,600 to $192,606,000. These hourly funds will be used to support the budget office with the increased demands from UVU departments for data, as well as additional reporting requested from the commissioner office on several items including acute equity.

Request (base)

$29,000
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.
Objectives

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.

Key Goals 2013-2017

- Update List of policies that are due for 5 year review
- Develop long-term policy development strategy plan
- Round 2 of policy manual update – glossary updates
- Complete style guide and glossary
- Develop an online training site
- Develop quarterly policy office training
- Select new online Policy Management System
- Implementation of new Online Policy Management System
UVU utilizes transparent and collaborative decision-making process."

UVU's policy requirements are growing due to new university programs being developed and new compliance requirements mandated by state and federal law. To support the increased volume of policy development, the new editor/writer will assist stewards and sponsors with research and writing. The editor/writer will work under the direction of the Policy Officer.

Request (base)

$32,950
Operate Effectively

3

"UVU utilizes transparent and collaborative decision-making process."

Workflow Software

- Replace Tops 2

Workflow software will be used to support the development, debate, review, and approval of policies as they go through UVU's policy development process. This process supports our shared governance model.

Request (base)  |  (One-time)
---|---
$2,950  |  $4,000

Policy Office

Goal Name: Policy Office Goal 4
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
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
  • Ongoing collaboration with Academic Affairs in the development 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,
  • 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
Data Analyst Position

- Low level functions
- 3rd party surveys
- Ad-hoc requests

Currently, we have one analyst who spends a majority of his time on 3rd party surveys and ad hoc reports. While these are crucial functions, the department needs to work on more projection analysis. An analyst position that would take this low-level work would free up time to do this. In addition, the analyst would be involved with documenting current reports, working with external departments on data requests, particularly through the use of Argos' datablocks and Tableau dashboards.

Request (base) $67,901

Goal Name: Official Reporting & Data Management
Part Time Analyst

- Position currently funded for one year

This analyst position has currently been beneficial in gathering data from outside sources creating reports. This has been helpful in meeting some of our reporting needs and would like to make this position permanent.

Request (base)

$29,000
75th Anniversary Alumni Survey

- Collect data for 75th anniversary to tell UVU’s Story.

The 75th anniversary of UVU presents a unique opportunity to tell our story. A broad telephone survey of alumni could potentially allow IRI to describe our impact on the community, and the impact we’ve had on people's lives, in a historical perspective our current data does not allow. This effort could take different forms, including using existing resources to mine data we already have, to a full-scale initiative to contact by phone all previous alumni in a joint effort of outreach and information gathering. The money listed here represents a large scale telephone survey effort to contact all alumni.

Request (One-time)

$130,000

Goal Name: IRI seeks to fulfill UVU’s information and assessment-related needs related to UVU’s initiatives and Policy
Institutional Effectiveness & Planning

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.

Marc Jorgensen, Director

Jeff Johnson, Assistant Director
Objectives

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.
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