

**PBA**



UTAH VALLEY  
UNIVERSITY™

**Planning-Budget-Assessment**



# PBA Webpage

<http://www.uvu.edu/pba>

Strategic Planning & Process Guide

2019-20 PBA Guidelines

PBA Online System

Current & Past PBA Cycles

PBA Power Point Training





# Planning, Budgeting and Assessment

[CURRENT PBA CYCLE](#) | [PAST PBA CYCLE](#) | [PBA ONLINE SYSTEM](#)

2018-19 PBA detail is on the "Current PBA Cycle" tab above.

## What is PBA?

Utah Valley University utilizes an internally developed Planning, Budgeting, and Assessment (PBA) process to guide resource allocations. This annual PBA process connects the resource allocation decision making process with university and divisional assessment, planning, priorities, and initiatives. PBA is founded on the concept that "a budget is a map guiding an institution on its journey in pursuit of its mission." (College & University Budgeting, NACUBO) Resource allocations support UVU's mission, values, action commitments, and objectives. The PBA process promotes accountability, collaboration, communication, efficiency, equity and transparency.

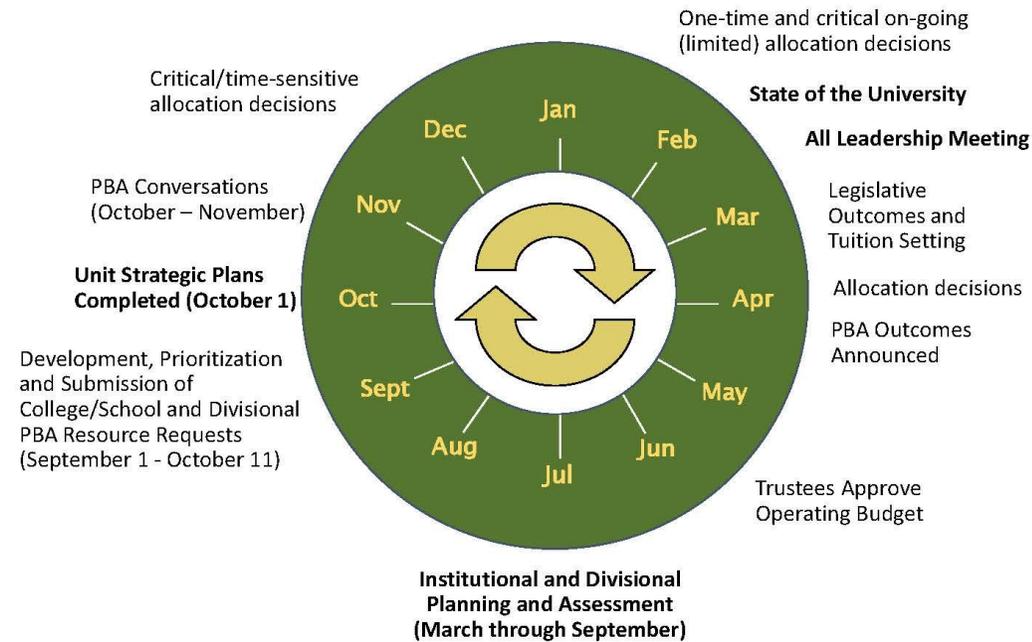
### 2019-20 Planning, Budget & Assessment (PBA) Cycle



Purpose

Conversations

# 2019-20 Planning, Budget & Assessment (PBA) Cycle



**The PBA process connects the resource allocation decision making process with university and divisional assessment, planning, priorities, and initiatives.**

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▪ **Address the following in your PBA requests:**

▪ **Values:**

- Exceptional Care
- Exceptional Accountability
- Exceptional Results

▪ **Action Commitments & Objectives:**

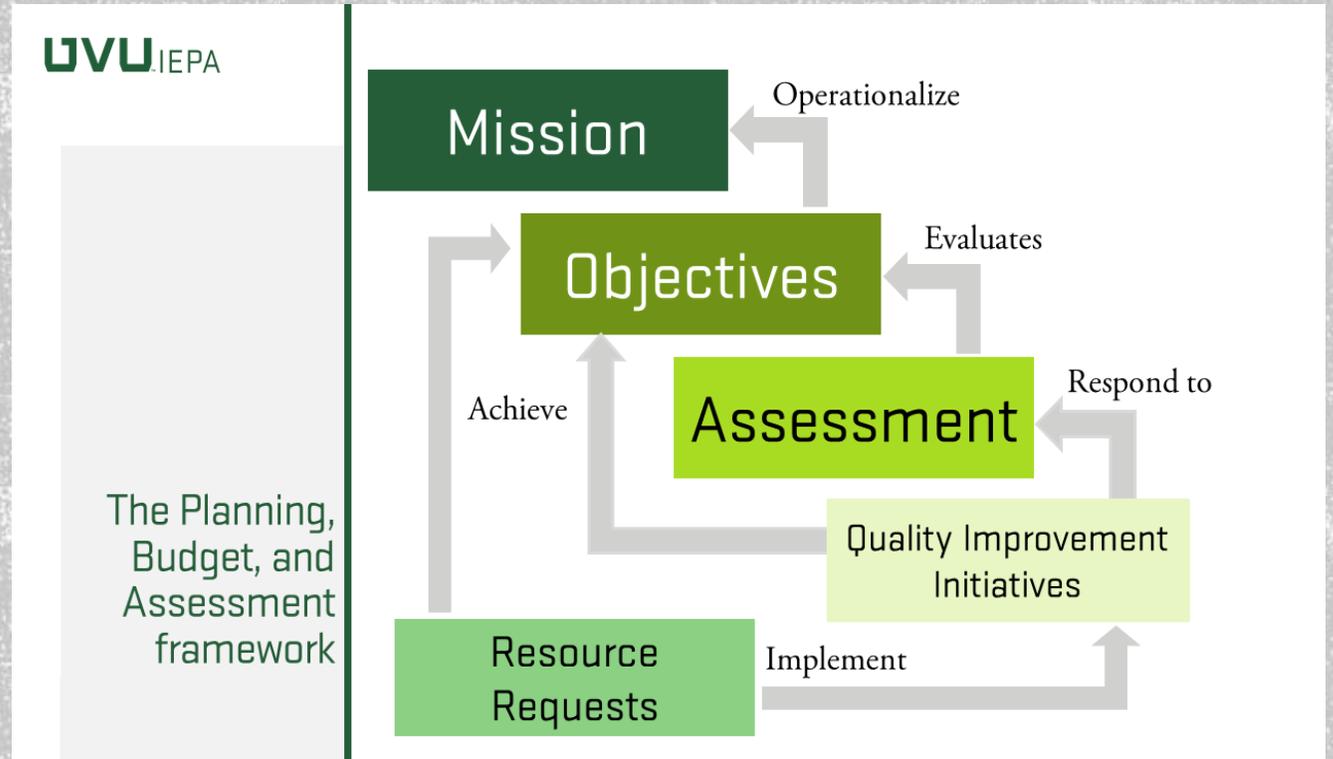
- Include
- Engage
- Achieve
- Organizational Sustainability



# Strategic Planning

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**Strategic plans are the primary means of supporting budget requests.** Strategic plans are required for the institution, colleges/schools, and all units led by executives. Executives may also require department strategic plans.



# Four-Year Strategic Plans

Deadline

**Tuesday,**

**OCTOBER 1**

**Questions:**

**Institutional Effectiveness &  
Planning (IEP)**

**Jeff Johnson (x8993)**

**or**

**Jennifer Zabriskie (x8259)**

# Strategic Plans



# PBA Funding Ceilings

Based on revenue projections, each division limits the amount of on-going and one-time requests for appropriated funds within ceilings.

Division	On-going Request Ceiling	One-Time Request Ceiling
Academic Affairs	\$6,349,900	\$6,985,000
Finance & Administration	\$2,072,600	\$2,280,000
Student Affairs	\$793,200	\$873,000
University Relations	\$398,300	\$218,000
Development & Alumni	\$849,100	\$219,000
Planning, Budget & Human Resources	\$219,300	\$241,000
President Office	\$167,600	\$184,000
General (O&M, Scholarships, Software Inflation)	TBD	TBD
<b>Grand Total</b>	<b>\$10,850,000</b>	<b>\$11,000,000</b>



# PBA Request Preparation, Submission And Prioritization

- All requests for new resources and/or new salaried positions should be submitted through the PBA process regardless of funding source.
- Requests for resources from non-appropriated funds require the identification of non-appropriated revenue to support request.
- Phase 1 Prioritization need only occur at the College/School or Division/Department Level, except for direct reporting areas that do not have an executive (VP's complete Phase 2 prioritization in the spring).



# ANNUAL PBA CONVERSATIONS

October 28<sup>th</sup> 9:00 am - 11:45am  
October 30<sup>th</sup> 8:45 am -10:05am  
November 1<sup>st</sup> 9:00 am -11:00 am  
November 1<sup>st</sup> 1:00 pm - 4:00 pm  
November 6<sup>th</sup> 9:00 am - 10:30 am  
November 6<sup>th</sup> 2:30 pm - 5:00 pm  
November 7<sup>th</sup> 9:00 am - 10:00 am



# PBA Deadlines

Last Day  
to **submit** and for Executives  
to **prioritize**-phase 1  
PBA resource requests  
(using the on-line system).

**Friday**

**OCTOBER 11<sup>th</sup>**



# PBA PROCESS

- Logging on to the PBA On-line System
  - <https://ais-linux7.uvu.edu/pba/>
- Submitting a Resource Request
- Editing a Request
- Prioritizing Requests
- Reports

uvu Planning, Budgeting and Assessment x +

← → ↻ https://www.uvu.edu/pba/

UTAH VALLEY UNIVERSITY PLANNING, BUDGETING AND ASSESSMENT

CONTACT US CURRENT PBA CYCLE PAST PBA CYCLES STRATEGIC PLANNING & PROCESS GUIDE PBA GUIDLINES PBA ONLINE SYSTEM

## Planning, Budgeting and Assessment

CURRENT PBA CYCLE PAST PBA CYCLE PBA ONLINE SYSTEM

2018-19 PBA detail is on the "Current PBA Cycle" tab above.

### What is PBA?

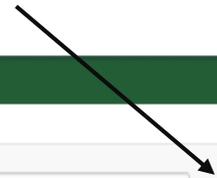
Utah Valley University utilizes an internally developed Planning, Budgeting, and Assessment (PBA) process to guide resource allocations. This annual PBA process connects the resource allocation decision making process with university and divisional assessment, planning, priorities, and initiatives. PBA is founded on the concept that "a budget is a map guiding an institution on its journey in pursuit of its mission." (College & University Budgeting, NACUBO) Resource allocations support UVU's mission, values, action commitments, and objectives. The PBA process promotes accountability, collaboration, communication, efficiency, equity and transparency.

### 2019-20 Planning, Budget & Assessment (PBA) Cycle



# PBA REQUEST

Start Here



My Requests

Budget Office ▾

Project Tracker

Reports ▾

General Requests **0**



Filter

New Request

Priority	Number	Title	Department	Amount	Info
----------	--------	-------	------------	--------	------

Budget Office | [palmersu@uvu.edu](mailto:palmersu@uvu.edu) | 801.863.6887 | ROOM HF-210 | Logout





Step 1/5



Requesting Unit

**Requesting Unit:**

- 
- 
- 

**Specific Area:**

**General Request** ?

The budget office will review all general requests

**R401 Request** ?

R401 requests will be reviewed by the budget office

**Resource Request Title\***

*This should be a simple title that will uniquely identify this resource request.*

**Brief Description of the Resource Request\***

*Must be fewer than 200 characters*

Next

Save

Next: answer the questions in the online form.





Step 2/5



Action Commitments

**Action Commitment\***

Select an Action Commitment

Include

**Include**

UVU integrates educational opportunities appropriate to both community colleges and universities.

**Enter the name of the Unit Objective or Quality Improvement Initiative\***

Create a new Quality Improvement Initiative

**Quality Improvement Initiative Name\***

Identify the short title of the Quality Improvement Initiative in your unit's four year strategic plan that this request supports. All requests must support a specific Quality Improvement Initiative in your plan.

**Quality Improvement Initiative Rationale\***

Describe how this PBA Request will support achievement of the Unit Objective or Quality Improvement Initiative. (This should be included in your strategic plan.)

*No more than 1,000 characters*

test

Previous

Next

Save

← Select “create a new objective” - enter your own area initiative based on strategic plans.





Appropriated Base ?

Account Type	Amount
Staff Hourly	\$ 17000
Benefits	\$ 1360
Current	\$ 0
Travel	\$ 0

+ Add new line item  
Subtotal: \$18,360

Appropriated One-Time ?

+ Add new line item  
Subtotal: \$0

Non-Appropriated Base ?

+ Add new line item  
Subtotal: \$0

Non-Appropriated One-Time ?

+ Add new line item  
Subtotal: \$0

Grand Total: \$18,360



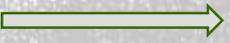
When you choose the type of employee and enter in the amount of funds requested for a position, the system automatically calculates benefits.



Grand total calculated for you! (No math!)

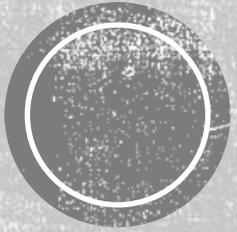


# New items in System:

- Summary tab on the list of your requests
- Pop up reminders about editing after items are prioritized
- Multiple requests can be left incomplete and finished later (or even deleted!)
- 1X funding request follow-up/clarification question
- Core Themes  Action Commitments



# Hands-on Training



**(Beta Testing Site)**

**<https://ais-linux7.uvu.edu/pbabet/>**

# Closing the loop- Accountability for PBA funding Due October 1



<b>UTAH VALLEY UNIVERSITY</b>															
<b>ALLOCATION SUMMARY ACADEMIC AFFAIRS</b>															
<b>PBA 2018-19</b>															
<i>Talk with Tuminez-Allocations April 2019</i>															
							Appropriated			Non-Appropriated			Accountability		
PBA Request	Division	School/ College/ Unit	Request #	Allocation	Brief Description	Rationale	2018-19 One- time	2019-20 Base	2019-20 One- time	2018-19 One- time	2019-20 Base	2019-20 One- time	If funded for a new position, has the position been filled? If not, why?	How has the funding been implemented?	What results have been achieved with the new funds?
Faculty, Automotive Power Sports	Academic Affairs	CET	278	Dec/Jan	The Power Sport Technology AAS degree is new and was approved to begin Fall 2018. A faculty member is needed based on R401	Tenure Track faculty is instrumental to give consistent and quality instruction to students of this new program.		\$98,614							
AS in Intelligence Studies Hourly Faculty, current expense	Academic Affairs	CHPS		Dec/Jan				\$10,821							

# Questions?

## Contact the Budget Office

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