November 24, 2014

Dear Campus Community,

With the appointment last year of the University Budget Committee (UBC) and the appointment of the University Strategic Alignment Process Task Force (USAP) this year, questions of the functions of these groups, along with the Senate University Resources Policy Committee’s (URPC) Budgetary Affairs Subcommittee (BAS), as they specifically relate to budgetary recommendations, have arisen. Below, the functions of each of the three groups are detailed. In addition, to assure the sharing of information and communication between and among the groups, some individuals will hold common membership.

I am proud of the campus support for strategic alignment and the work currently underway by the USAP Task Force. While there is anxiety around the process and, as with any new initiative, evolution of the process as we proceed, I am pleased about the many people who have embraced it and are utilizing USAP as an opportunity to create the future. This is happening by defining priorities and goals, establishing a forward-thinking direction and building a plan for getting there. I am excited and anxious to see the ideas that are emerging from the unit conversations to establish meaningful goals that align with Plan 2020. I want to thank you for all you are doing to support this effort. Aligning goals and budget with our strategic plan is the most important initiative we can undertake at this time.

USAP has and will continue to evolve in order to meet the needs of the institution. We work in a dynamic environment where external forces continue to impact higher education. As such, it is critical that we remain adaptable and willing to embrace adjustments as they become necessary. The USAP team is committed to ongoing transparency and communication and they will continue to ensure the campus community is informed of their status and progress.

At this time, we anticipate a two-year process before USAP is fully integrated within our normal operations. This year, by collecting a baseline, goals, action plans and metrics for every department throughout the university will be established. Next year, the focus will be on aligning these plans with the budget, ensuring our resources are clearly supporting the priorities and goals of Plan 2020. Ongoing measurement towards achieving goals will ensure we are mutually accountable for making progress and as a result, strengthening the institution. A timeline for transition of this process will be determined as we move forward and learn more from this year’s work.

**University Strategic Alignment Process (USAP) Task Force**

Review/analyze unit goals for alignment with Plan 2020 goals:

University-level analysis;

- Make recommendations related to alignment with and progress toward Plan 2020 goals (e.g., identify university goals that need more focused attention from more units, identify gaps that need to be addressed)
- Identify unit goals with potential to have a strong impact on Plan 2020 goals
- Recommend possible collaborations or shared responsibility to create efficiencies
- Recommend changes that will lead to increased operational effectiveness
- Beginning in year 2, utilize the qualitative and quantitative data generated by units to provide a broader picture for consideration in making recommendations.

**University Budget Committee (UBC)**

- Develop standardized templates for use by all units for reporting budget data
- Review previous year’s recommendations and resulting allocations
• Review unit/division budget requests
• Make budget recommendations to senior administration

University Resources Policy Committee (URPC) Budgetary Affairs Subcommittee (BAS)

Advise on budgetary policy matters pertaining to the needs of the campus:

• Annual operating budgets and legislative budget requests
• Financial needs of new programs and new facilities
• Major fundraising efforts
• May consider requests for advice on financial matters which affect work of other Senate committees

Please keep in mind that newly established processes and working groups evolve and require both time and adjustments as improvements occur. This year’s budget will have unprecedented input from at least 50 members of the campus community via three formalized advisory/recommending groups. I remain committed to transparency of our budgeting process and to the inclusion of faculty, staff and administrators in formulating the budget. Our first year’s process resulted in recommendations from UBC that were accepted in their entirety. I am confident that this year’s process, with added input from the USAP Task Force and URPC’s BAS, will inform an even stronger final budget and one that is more fully aligned with our institutional priorities.

IPFW enjoys a stable budget and one that is balanced for the first time in many years. This has been accomplished through the hard work and difficult decisions of many over the past two and a half years. Additionally, our financial index of 2.7 further demonstrates the stability of our financial position.

Taking on this very deliberate and strategic alignment of goals and resources is the single most important thing we can do to position this university and its students for a thriving future. Again, I thank all of you for your engagement in the process, for your support of it and for the hard work that will continue to be required to move us forward.

Sent via email from Vicky Carwein