

TRANSPARENCY A TOP GOAL OF NEW BUDGET PROCESS

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When the Operations Advisory Committee was formed in February, one of its initial tasks was to develop a new budget-planning process that accomplished three primary goals: First, it had to be transparent so the campus community would gain a better understanding of the rationale for the decisions made. Second, it had to set the framework for us to move away from incremental, historical budgeting. And third, it must be integrated into our other planning tools such as the Balanced Scorecard, the emerging Academic Plan and Program Review.

The advisory committee — whose members included deans, department chairs, staff and members of the administration — sought input from vice presidents, Council of Deans and the Executive Committee of Faculty Senate before presenting the new process to the president and ultimately, the Board of Trustees. The Board approved the process at its August meeting.

The new process is laid out in the diagram on this Web page — http://www.uakron.edu/provost/docs/Budget_Planning_Organizational_Chart1.pdf . Let me lead you through it, starting with the Board of Trustees circle to the left.

The institutional priorities set by the Board of Trustees create the foundation of the emerging Academic Plan, which in turn is measured by the Balanced Scorecard and Program Review. For Program Review (the topic of a future “Perspectives” message), productivity data will be compiled for each academic area. For non-academic areas, customer-service excellence surveys will be conducted, and benchmark data from peer institutions will be collected. That data will be merged with information from the budget office/integrator (in the blue box) and provided to the division heads (deans and VPs) for review and verification. The deans and VPs will use the data, along with input from their division community, to write their unit's budget request, which then will be presented to senior leaders. A small committee consisting of the chief operating officer, chief financial officer, president and some members of the Operations Advisory Committee will make final recommendations to the Board of Trustees.

The new budget process has been designed to ensure that resource decisions are transparent, data-driven and supportive of the academic and operational plans proven to advance student success and the goals of the institution and the community.