Building Bridges: The Link Between Strategic Planning and Budgeting

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• Conditions for Collaboration
• The University's Strategic Plan
• Annual Budget Planning Process
• Report Card
• Campus Town Hall Meetings
• Lessons Learned
Promote change

President/Provost/VPs’ leadership

Work within institutional processes and culture

Garner allies

Link resources to initiatives

Demonstrate impact/value of change
• What will it look like if strategic planning is done right and linked to budget?

• What are the agreed on shared values?

• How will progress be measured?
Strategic Plan:
Boise State’s Strategic Plan

**Academic Excellence**
Academic Excellence denotes high quality student focused programs that integrate theory and practice, engage students in community based learning, and are informed by meaningful assessment.

**Public Engagement**
Public Engagement links the University’s academic mission with its community partners to address issues of mutual benefit.

**Vibrant Culture**
A Vibrant Culture embraces and fosters innovation, responsiveness, inclusiveness, accessibility, diversity, and effective stewardship.

**Exceptional Research**
Exceptional Research is defined by progressive scholarship and creative activity, and graduate programs that have groundbreaking applications locally, regionally, and globally.
Develop network and outreach opportunities with the community

Respond to the educational needs of the region

Provide development opportunities for faculty to integrate research and teaching

Promote diverse communities that foster faculty, staff, and student interaction

Provide student-centered services

Build and maintain facilities to support programs and create an attractive and accessible environment

Recruit and retain an academically-prepared and diverse student body

Create an organization that is responsive to change

Recruit and retain faculty and staff to support the vision

Obtain fiscal resources necessary to support the vision
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Charting the Course
A Strategic Vision for Boise State University

METROPOLITAN RESEARCH UNIVERSITY OF DISTINCTION

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Exceptional Research
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Recognized for integrating research with teaching and learning in high-quality programs

Recognized for partnerships that contribute to regional growth and development

Recognized as a center for cultural and intellectual exchange that enriches the community

Develop network and outreach opportunities with the community

Respond to the educational needs of the region

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Boise State University
Strategy Matrix

These guiding strategies reflect potential routes by which Boise State University will achieve its goals.

### GOALS

| (a) Reward, promote, and publicize student and faculty successes in research and the integration of research with teaching |
| (b) Redesign annual evaluation and promotion and tenure criteria to include integration of research and teaching |
| (c) Develop flexible workload policies for faculty |
| (d) Promote and reward research in and with the community |
| (e) Expand student recruitment efforts |
| (f) Create additional opportunities for student financial assistance |
| (g) Implement Freshman Success Task Force Action Plan |
| (h) Create active learning opportunities in-class and out-of-class |
| (i) Create a community college |
| (j) Align educational offerings with economic development needs and incorporate employers’ input into curriculum design |
| (k) Transform course delivery options |
| (l) Facilitate faculty collaborations across departments and colleges |
| (m) Develop a staffing plan, compensation packages, and structures commensurate with a metropolitan university |
| (n) Schedule, promote, and facilitate involvement in cultural and intellectual events |
| (o) Promote collaboration and sharing of information between campus and the community |
| (p) Develop and promote programs to internationalize the campus |
| (q) Promote to the state the value of investing in higher education |
| (r) Secure funds from sponsored research activity |
| (s) Build and sustain a comprehensive advancement/fundraising program |
| (t) Implement the campus master plan |

### STRATEGIES

| (1) Develop, leverage, and outreach new partnerships with communities |
| (2) Respond to the educational needs of communities |
| (3) Refine and develop support units to support and assist in the planning and implementation of plans and strategies |
| (4) Build and maintain facilities to support programs and services |
| (5) Ensure the success and well-being of students through an integrated, supportive student experience |
| (6) Provide student-centered services |
| (7) Achieve a stable and healthy future |
| (8) Provide student-centered services |
| (9) Create an organization that is responsive to change |
| (10) Obtain fiscal resources necessary to support its vision |
- Campus Master Plan
- College/Division individual plans
- Annual Budget Planning Process
- Unit Actions and Projects
- Annual Report Card
Annual Budget Planning Process Timeline

- **Early January**: Templates to Colleges/Divisions.
- **February**: Enrollment/productivity data to Colleges (including data over time and data enabling comparisons among departments).
- **January-February**: Colleges/Divisions engage in their own process for planning.
- **Late March**: College/Division level documents due electronically to Budget Office.
- **Late March**: Provost prioritizes academic unit plans.
- **April**: President, Provost, and Vice Presidents prioritize institutional plans.
• Section 1: Planning details
  • Albertsons Library

• Section 2: Budget details
  • College of Business & Economics
I. **Strategic Planning and Reporting**

Briefly describe any progress that has been made in the development of college/department strategic plans and in the development of measures to depict the progress in achieving strategic goals.

Library and University strategic plans are used extensively by the Library for planning, budgeting, and assessment purposes. Goals and priorities are also used for developing individual library faculty member and staff annual goals and assessing accomplishments. A library assessment team has been formed and looks at various assessment measures. One of our major assessment measures is the standardized LibQUAL+ survey. (See the results of the spring 2010 LibQUAL+ survey, [http://library.boisestate.edu/libqual/](http://library.boisestate.edu/libqual/))
II. Accomplishments

1. Increased Access to the Needed Databases, Journals, and Books, eBooks, Media, and Other Resources that Support Research and Learning on Campus.

**Library Strategic Plan Goal 4:** Provide support for the research needs of our faculty, staff, and students

*University Strategic Plan Goal 3:* Provide developmental opportunities for faculty to integrate research and teaching

**Library Strategic Plan Goal 1:** Serve the campus population by providing an effective library collection

*University Strategic Plan Goal 8:* Provide student centered services

collections being acquired include robust academic content, immediate access, and the ability to download books to mobile devices. We have also responded to the need on campus for access to streaming videos and music databases that can be simultaneously used by a large number of students, incorporated into learning management systems, allow students the flexibility to use material at any time they choose, and provide access via mobile devices. In response to that need, we have purchased access to a variety of streaming video and music databases in multiple disciplines.
II. Accomplishments

2. Developed and Implemented Library and Campus Mobile Initiatives

**Library Strategic Plan Goal 5:** Provide access to and assistance with information resources.

**University Strategic Plan Goal 8:** Provide student centered services.

**University Strategic Plan Goal 9:** Create an organization that is responsive to change.

our students and faculty accessing Library and campus information resources from mobile devices. Increasingly we are acquiring databases, journals, and eBooks that include mobile accessible formats. Having both library collections and services easily accessible to our faculty and students from mobile devices is a priority for the Library.

The Library created and deployed a Library mobile website last spring and is now using our expertise to help create the university’s mobile website. The Library also partnered with the School of Social Work and the Provost’s Office on a project to assess the impact of the use of mobile devices and enriched library e-content on students. A successful text messaging reference service was also implemented this year. Two librarians are embedded in the University’s m-Learning Scholars program where they are supporting mobile initiatives across campus. Librarians and library staff are actively using mobile devices themselves and looking for creative and innovative ways to utilize mobile devices, particularly iPads and smartphones.
II. Accomplishments

OPTIONAL: Strategic and Operational Accomplishments

3. Implemented Innovative Teaching Collaborations with Campus Partners

Library Strategic Plan Goal 3: Actively Participate in teaching

University Strategic Plan Goal 3: Provide development opportunities for faculty to integrate research and teaching

The Library continues to look for ways to enhance learning on campus through our instructional activities. Here are three examples from this past year:

Library 101 – piloted a new instructional approach in October 2010 that reached an increased number of first-year students with an interactive library experience. Librarians invited English 101 courses to visit the library for tailored instruction on library research and services. In two days, forty sections of English 101 (nearly 1,000 students) circulated as a class through four stations in the library.

Project Writing & Research (PoWeR) eTextbook – collaborated with First Year Writing instructors to develop and published a freely available research instruction textbook, including streaming video tutorials and an instructor edition with relevant activities. The textbook has been embedded in English 102 classes.

Subject-specific University 106 – for example, a University 106 library literacy course is now offered targeted at students participating in the STEM program; one focuses on marketing; and a third class is tailored to meet the information needs of health science students.
II. Accomplishments

OPTIONAL: Strategic and Operational Accomplishments

We have drastically reduced the amount of time from the point when a faculty identifies a needed book to that book being available for their use.

We have drastically reduced the amount of time from the point when a faculty identifies a needed book to that book being available for their use. When a faculty request is received it is immediately reviewed and if possible, purchased and delivered within 5 days or less. If the book is available digitally is often

We have restructured the interlibrary loan process to include patron initiated acquisitions, purchasing requested items rather than borrowing them from another library.
II. Analysis and Planning

A. Overview of planned actions. Give a short, broad (not detailed) overview of actions planned for the next several years. As necessary, discuss your proposed actions both in terms of the immediate time frame of this next year and in terms of a longer-term time frame. Discuss, as appropriate, the factors and trends that drive your proposed actions.

The very rapidly changing technological environment has enormous implications for the types of resources and services that the Library offers the campus. The Library is trying to quickly respond and capitalize on those changes.

The addition of new graduate programs, particularly doctoral programs, greatly impacts the kinds of information resources the campus needs. This puts additional budgetary pressures on the Library’s acquisitions budget, especially as we compare the Library’s available resources to our aspirant peer doctoral granting institutions. This impact and disadvantage with our peers will only increase as the new programs become more mature. Adding new faculty and more graduate students in new research areas requires a higher level of investment in library acquisitions to support the campus.
III. Planned/Proposed Budget Reallocations and Reductions

A. Reallocation of Resources via Consolidation, Reorganization, etc.

In this section, please describe your unit’s plans to strategically reallocate funds as a result of consolidation, reorganization, discontinuation, etc.

- List a title for the planned action and describe the planned action.
- Describe the reasoning behind the action. Upon what evidence are you basing the action?

As part of the cuts of the last few years we have eliminated some staff positions entirely and consolidated the work of others. We review every open position and have reorganized units to work most effectively doing the most important functions. We have eliminated processes as part of this reallocation and prioritization.
III. Planned/Proposed Budget Reallocations and Reductions

B. Reduce/Eliminate

Use this section, as needed, to provide additional information regarding the budget reductions you have proposed on your budget excel worksheet. In general, it will be sufficient to relatively small and simple actions only on the excel worksheet. Relatively large and complex actions may well benefit from you providing a more extensive description immediately below.

- List a title for the proposed action that corresponds with the title given to the budget reduction on the “Budget Reductions” tab of your excel budget worksheet.

- As appropriate and useful, describe the proposed action and share the reasoning behind and impacts of the action: Upon what evidence are you basing the action? What do you expect to occur as a result of the action?
III. Planned/Proposed Budget Reallocations and Reductions

B. Reduce/Eliminate

1. Reduce Library Acquisitions

The Library is proposing and has been asked by the university administration that our reduction be taken in Library acquisitions, with the plan that this funding will be filled with one-time funds from the campus in FY 12. If that one-time funding for FY 12 does not occur, or if there is no way to reinstate base acquisitions funds in FY 13, we will need to further reduce Library acquisitions—books, journals, databases, and other items. In order to maintain the needed online journals, databases, and other serials we purchase for the campus, we have already drastically reduced the funds available for book purchases (both print and eBooks) and further cuts will need to come from all areas of the library acquisitions budget.

New academic programs being instituted and new areas of research developing on campus further intensify the acquisitions need and amplify the impact of acquisition reductions.
Budget Section:

- Excel document with multiple tabs
- Units describe:
  - Carry forward
  - Space
  - Reallocation
  - Budget reductions
  - Appropriated summary and local balances
What is provided below in the white areas is historical information (both appropriated and local funds). The yellow highlighted areas are where you should enter information related to dollars spent on carryforward from last year and what is anticipated for next year.

### APPROPRIATED FUNDS

<table>
<thead>
<tr>
<th>Description</th>
<th>Dollar Amount (less Special Programs)</th>
<th>Additional Comments</th>
<th>Dollars Spent</th>
</tr>
</thead>
<tbody>
<tr>
<td>Carryforward 2008 -&gt; 2009</td>
<td>358,010</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Carryforward 2009 -&gt; 2010</td>
<td>453,832</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Projected Carryforward 2010 -&gt; 2011</td>
<td>234,000</td>
<td><em>This is what was submitted on last year's planning documents</em></td>
<td></td>
</tr>
<tr>
<td>Actual Carryforward 2010 -&gt; 2011</td>
<td>475,249</td>
<td><em>What was actually carried forward (less Special Programs)</em></td>
<td></td>
</tr>
</tbody>
</table>

Planned use of Carryforward from Prior Year Planning documents

<table>
<thead>
<tr>
<th>Planned use of Carryforward</th>
<th>Dollar Amount</th>
<th>Additional Comments</th>
<th>Dollars Spent</th>
</tr>
</thead>
<tbody>
<tr>
<td>Faculty research support, conf. presentations, and travel</td>
<td>41,755</td>
<td></td>
<td>32,255.00</td>
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<tr>
<td>Additional GA Support</td>
<td>40,000</td>
<td></td>
<td>40,000.00</td>
</tr>
<tr>
<td>Special lecturer and adjunct pay</td>
<td>50,000</td>
<td></td>
<td>50,000.00</td>
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<tr>
<td>Staff and student support, OE, and fund shortfalls</td>
<td>77,709</td>
<td></td>
<td>33,238.00</td>
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<tr>
<td>Technology</td>
<td>24,085</td>
<td></td>
<td>14,084.00</td>
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<tr>
<td><strong>TOTALS</strong></td>
<td><strong>233,549</strong></td>
<td></td>
<td><strong>169,577.00</strong></td>
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</tbody>
</table>

Projected Carryforward FY 2011 -> 2012 338,830

Planned use of Carryforward

<table>
<thead>
<tr>
<th>Description</th>
<th>Dollars</th>
</tr>
</thead>
<tbody>
<tr>
<td>Faculty research support, conf. presentations, and travel</td>
<td>115,670.00</td>
</tr>
<tr>
<td>Additional GA Support</td>
<td>30,000.00</td>
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<tr>
<td>Special lecturer and adjunct pay</td>
<td>44,500.00</td>
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<tr>
<td>Staff and student support, OE, and fund shortfalls</td>
<td>120,075.00</td>
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<tr>
<td>Technology</td>
<td>20,525.00</td>
</tr>
<tr>
<td><strong>TOTALS</strong></td>
<td><strong>338,830.00</strong></td>
</tr>
<tr>
<td>Brief title of space need</td>
<td>Type of space</td>
</tr>
<tr>
<td>--------------------------</td>
<td>---------------</td>
</tr>
<tr>
<td>Office space for the Director of the Business Research and Economic Development (BRED) Center</td>
<td>Office</td>
</tr>
<tr>
<td>Office space for a new Supply Chain Management Professor to arrive in summer 2011</td>
<td>Office</td>
</tr>
<tr>
<td>Priority Order</td>
<td>Brief Title of Proposed Action</td>
</tr>
<tr>
<td>----------------</td>
<td>--------------------------------</td>
</tr>
<tr>
<td>EXAMPLE</td>
<td>Reduce Travel</td>
</tr>
<tr>
<td>1</td>
<td>Reduce OE</td>
</tr>
<tr>
<td>5</td>
<td>Reduce OE</td>
</tr>
<tr>
<td>6</td>
<td>Reduce Irregular Salary</td>
</tr>
<tr>
<td>7</td>
<td>Reduce Fringe</td>
</tr>
<tr>
<td>8</td>
<td>Reduce OE</td>
</tr>
</tbody>
</table>

**Base Budget - as of Jan. 31 2011:** 9,694,266

**2% of Base Budget:** 193,885

**NOTE:** #'s in the 'Priority Order' column below should correspond to numbered descriptions in Section IVB, (Reduce/Eliminate) of the accompanying WORD document.
Budget Decision Process

- Budget documents are submitted to the Vice Presidents/Provost for review and discussion

- VPs/Provost approve all budget documents for their respective departments

- Budget Office and Vice President for Finance and Administration review and approve

- Review and discussion by the Executive Team

- President has final approval
Report Card:
Boise State Again Listed Among ‘Up-And-Comers’
By U.S. News and World Report

Boise State University is listed among the “up-and-comers” of higher education institutions in U.S. News and World Report’s annual “America’s Best Colleges” issue for the second year in a row.

Released Tuesday, the magazine ranked Boise State at No. 5 in the western division of its “2011 Up-and-Comers” list for regional universities. In all, just 68 universities that have made “the most promising and innovative changes in the areas of academics, faculty, student life, campus or facilities” made the list. Rankings were based on the responses of experts who answered the magazine’s annual peer assessment survey.

In addition, Boise State’s College of Engineering was again ranked among the best undergraduate engineering programs in the nation by the magazine. Boise State was ranked 16th among comprehensive public universities and shares the No. 42 ranking among all undergraduate engineering programs with California State University-Sacramento, Maine Maritime Academy, Norwich University, Oregon Institute of Technology, Purdue University-Calumet and University of Massachusetts-Dartmouth.
**Destination: Academic Excellence** denotes high quality student focused programs that integrate theory and practice, engage students in community based learning, and are informed by meaningful assessment.

**Key Performance Measure:** *Students participating in courses with a Service Learning component*

The number of students who have enrolled in a course with a service learning component has nearly tripled over six years.
Destination: Exceptional Research is defined by progressive scholarship and creative activity and graduate programs that have ground breaking applications, locally, regionally and globally.

Performance Measure: Number of publications and number of citations of Boise State publications

Publications are key to increasing reputation in the area of research and creative activity. Boise State faculty publications have increased 77%. Faculty citations have quadrupled over the same time period.
**Goal:** Respond to the educational needs of the region

**Performance Measure:**
*Dual enrollment credits*

Over 9000 dual enrollment credits were awarded in FY2011, nearly an eight-fold increase since 2004.
Performance Measure: Degrees Awarded

The number of degrees awarded continues to increase. The total number of all degrees awarded increased by 63 percent between FY2003 and FY2011.
Performance Measure: Freshman Retention Rate (first-time full-time)

Freshman retention continues to improve. Nearly 70% of first-time academic freshmen who started in fall of 2010 returned in 2011. Initiatives to improve retention include enhanced orientation, advising programs, financial aid, higher admission requirements and expanded student housing.
Performance Measure: 
*Revenues received from all sources*

Total revenues have increased by 40% since FY2002. However, the composition has shifted and the proportion of revenues from state appropriations has decreased while the proportion from student tuition revenues has increased.
**Performance Measure:**

*Average educational expenditures per student*

From FY2002 to FY2009, educational expenditures per student increased by 18.4%. The decrease in the past two years negatively impacted progress, however the changes in distribution of funds to increase per student funding to academic support continues.
**Goal:** Build and maintain facilities to support programs and create an attractive and accessible environment

**Performance Measure:**

*Cumulative new space added*

Boise State has added nearly 1.2 million SF of new space for academics, student activities, and athletics in the past 12 years. A new 120,000SF College of Business and Economics building is scheduled to open this summer.
Campus Master Plan

1 Micron Business and Engineering Bldg.
2 Lincoln Avenue Townhouses
3 Environmental Research Building
4 University Health Services and Norco Nursing
5 Arguinchona Basketball Complex
6 Student Union Transit Center
7 Student Rec Center Aquatics
8 Lincoln Avenue Parking Deck
9 Student Union Building Addition
10 Interactive Learning Center
11 Caven Williams Sports Complex
1. Micron Business and Economics Building
2. Lincoln Avenue Townhouses

3. Environmental Research Building

4. University Health Services and Norco Nursing
5. Arguinchona Basketball Complex

6. Student Union Transit Center

7. Student Rec Center Aquatics

8. Lincoln Avenue Parking Deck
9. Student Union Building Addition

10. Interactive Learning Center

11. Caven-Williams Sports Complex
Campus Town Hall Meetings:
• Review the key budget impacts

• Discuss how the campus is impacted by legislative and State Board decisions

• Review guiding principles for budget decisions

• Review the campus process for addressing budget issues

• Show where reductions/increases are in the budget

• Discuss future plans and impacts
Guiding Budget Principles

- Support core educational functions
- Maintain the capacity to serve students
- Link budget decisions to the University’s Strategic Plan
- Identify and implement additional efficiencies where possible
Efficiencies and Cost Reductions Implemented

- Increased class sizes – added hundreds of seats per section
- Faculty are doing more due to increased class sizes
- Staff continue to carry heavy workloads due to increased demand
- Implemented intercession and increased summer enrollments to better utilize space and assist students to complete coursework
- Examined curriculum and streamlined the number of courses
- Reorganized departments and implemented administrative cost reductions resulting in lower FTE and operating costs
Lessons Learned:
Lessons Learned: Benefits

• Process applicable for both increasing and decreasing budgets

• Reduces ad-hoc requests

• Effective tool for reporting budget decisions to campus, State Board of Education, and Legislature

• Provides list of priorities for Advancement Office

• Transparency of process creates partnerships
Lessons Learned: Effective Implementation

- Need time—Boise State’s process is 3.5 months

- Over time we simplified process (2 templates: one for planning and one for budget)

- Added cumulative percentage spreadsheet

- Need periodic follow up to make sure units are following their plan

- Serves as a reference tool for midyear funding requests to determine alignment with strategic plan and budget priorities.
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Thank you!