

THE UNIVERSITY OF ARIZONA®
STRATEGIC PLANNING & BUDGET ADVISORY COMMITTEEFaculty Center
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facultycenter@email.arizona.edu**SPBAC Annual Report 2014-2015****Dr. Mika Galilee-Belfer**
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Sciences**Ms. Rebecca Blakiston**
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VP, Alumni Relations & President, UA
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Affairs & Provost**Dr. William (Bill) E Conway**
Mathematics**Dr. Vincent Del Casino**
Vice Provost Digital Learning/
Student Engagement**Mr. Peter Dourlein**
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Deans' Representative, Law**Dr. Lynn Nadel**
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ASUA President**Mr. Mike Proctor**
Vice President for Global Initiatives**Ms. Marilyn Taylor**
Senior Assistant VP, Finance &
Administration**Ms. Teri Thompson**
Senior VP, University Relations**Dr. Theodore (Ted) Tong**
Pharmacy**Dr. Kasey Urquidez**
Enrollment Management**Dr. Allison Vaillancourt**
VP, HR & Institutional Effectiveness**Ms. Kathy Whisman**
Assistant Vice President for Budget*Plus regular guests Tom Miller, Vice
Provost for Faculty Affairs, and Mary
Fleming, Coordinator, Academic Planning
Staff support provided by Barb Kuehn*

Initial meetings in AY 2014-15 were dedicated to working sessions to establish goals and priorities for SPBAC, which were identified as:

- input and refinement of Never Settle
- supporting the campus during move to RCM and associated governance
- participating and contributing to alignments between college and institutional planning, and
- working toward broadening campus communication

There was a strong commitment to SPBAC's mission as advisory to the Administration, and not just reacting to events. Efforts included identifying measures of success for the academic year. SBPAC met 17 times in AY 2014-2015.



COMMITTEE ISSUES AND ACTIONS

A. Progress on Never Settle

SBPAC members:

1. Worked with Barbara Bryson, Vice President for Strategic Planning and Analysis, on developing a one page draft document that summarized and aligned both the online *Never Settle* documents and the data and ideas that emerged with the ABOR presentation of last Fall. The goal is to produce a tri-fold document for the campus community that captures the essential components of the strategic plan to facilitate understanding and communication within the campus community. Barbara Bryson presented the document to SAC, and Co-Chair Mika Galilee-Belfer presented it to APAC. Co-Chairs, along with Barbara Bryson, facilitated a structured discussion in Faculty Senate around *Never Settle*, and heard from faculty senators of the need to better align the work being done on campus with the strategies and actions identified in the strategic plan. The tri-fold document is still being finalized by Barbara's office, with hopes that it will be ready this summer.
2. Provided feedback on a number of areas relative to the student experience after hearing updates from Vincent Del Casino, Vice Provost Digital Learning/Student Engagement, on institutional plans for UA Online and on policies related to the UA's 100% Engagement initiative. Members also heard updates regarding guaranteed tuition plans and the move to include student fees as part of the guarantee. Later in the Spring, SPBAC members were updated about the tuition setting process and the critical role that our student government leaders took in making recommendations.
3. Requested, and responded to, a facilitated discussion with Senior Vice President for University Relations Teri Thompson about types of communication that are being used and who the target audiences are, to better build UA awareness and reputation. SPBAC members now receive the daily news update from Teri Thompson's office.

Strategic Planning and Positioning

1. After hearing from key representatives of the Office of Sustainability, the Diversity Coordinating Council, and the Office of Global Initiatives, SPBAC members created a set of recommendations for upper administration on leveraging the institution's competitive advantages in the areas of diversity, sustainability (broadly defined), and globalization, which are key attributes in the cross-cutting/synergistic pillar of *Never Settle*: Identify the potential strategic benefits of these competitive advantages to build buy-in across the institution.
 - a. Identify values and goals from which action can be generated, and into which faculty and other campus constituents can both integrate their work and see how they contribute.
 - b. Establish institutional principles and sets of commitments.
 - c. Establish institutional 'baselines' regarding each of the three areas.
2. Consider the value of allocating responsibility/accountability for progress and goal attainment in each area, and ensure that any individuals given responsibility/accountability have the administrative authority and resources to affect change.
3. Make sure that, in each area:
 - a. research dimensions, academic dimensions, and operational dimensions are considered, valued, and integrated to the fullest extent possible;
 - b. administrative and other domains work together to reach University goals.
4. Identify the cost of actions and act quickly on those with no or low costs (e.g., policies and practices rather than institutional investments), so that action is possible and seen, even in times of economic constraint.

5. Tap “point persons” or “champions” to act as institutional “weavers” – people who can help those across the institution fit their own work into the competitive advantage areas as well as into *Never Settle* (i.e., a cadre who can answer the question of ‘Where can you fit your work into these principles/goals?’).

Progress on RCM and Budgeting

SBPAC members:

1. Heard from Tom Miller about the key findings of the Collaboration on Academic Careers in Higher Education (COACHE) survey, which compares faculty-related perspectives from 98 universities, included five UA peers; discussed impact of RCM and accountability-based budgeting on faculty work lives and agency.
2. Were involved in discussions around ‘decision-points’ in budgeting given cuts in state funding, as well as in conversations about progress and communication of RCM (to Deans, to department heads).
3. Responded to proposed changes to ERE around the number of different ERE rates, the handling of vacation payouts, and graduate student ERE.
4. Requested a panel presentation, which included active engagement and questions from SPBAC members, of four College deans and their teams about RCU plans for RCM. The four Colleges included Humanities, Education, Agriculture & Life Sciences, and Science. While there was quite a bit of variation in the implementation and governance processes between colleges, it is clear that each college was making significant progress in preparing for RCM for FY16. College representatives discussed shared governance mechanisms and their approaches to strategic investment and for accommodating fluctuation in majors and student credit hours from year to year. College representatives also acknowledged that issues relating to historical practices become much more visible with the transparency provided by RCM, and for this reason, among others, it is important that faculty and others involved in revenue generation and expenses better understand how the system, and hence University, work. Among the challenges for colleges in RCM will be monitoring course enrollments carefully; to that end, the ability to nimbly adjust or change teaching spaces will become even more important moving forward.
5. Reviewed recommendations for dealing with budget cuts from campus stakeholders who responded to a request from the Provost to email ideas directly to him, and made efforts to provide guidelines for budget cuts.
6. Responded to a set of guidelines designed to help in decision making around budget cuts in state funding for FY16.



Randall Richardson



Mika Galilee-Belfer