Budget Analysis and Planning

Strategic Plan (FY2024 through FY2027) — *bridging the gap to resilience*

Vision: BAP strives to be UCSC's most trusted source for information, advice and policy guidance, promoting best-practices in resource management

Mission

- Strategic partner to leadership, principal officers and campus stakeholders — provide transparent communication, information, analyses, and innovative financial and information solutions to support the university's mission

- Oversee and manage centralized campus data warehouse services (reporting and information services to all campus units)

- Provide best-practice operational support of campus budget maintenance and reporting functions, multi-year resource planning, and financial analyses to support leadership and advisory committees

Core Values

- **Transparency** — information/analyses to provide context and guide decisions

- **Information empowerment** — strengthen decision support through common language for data analysis and reporting

- **Collaboration** — realign focus and optimize collective strengths

- **Resource optimization and resilience** — best practices to maximize campus potential

- **Compliance and accountability** — ensuring costing and rate setting are balanced in affordability, clarity, appropriateness

- **Innovation and future-ready planning tools** — embrace modernization and business process improvements that are cost-effective, ideally reduce manual workload, and have adequate return on investment

Improve campus-wide understanding of (and access to) information about campus resources and productivity

Priorities

- **Communicating timely and transparent information** – to utilize shared/common language; develop metrics/reports available to all campus leaders to evaluate financial health and progress toward campus goals.

- **Educational outreach** – expand training offerings to improve financial literacy, budget practices, and data comprehension among campus stakeholders

- **Enhanced dissemination** – revitalize active web presence for both public and intranet (internal) information guidance

- **Communicating data concepts** – and training users to leverage the CDP

- **Streamline information access processes**

Potential Metrics / KPIs

- Assess the timeliness and completeness of recurring decision-support presentations, publications, reports

- Track attendance/participation in training; measures of improved financial literacy across campus; and implementation progress for information dissemination plans

- Develop measures of CDP progress and usage

- Track turnaround (timeliness relative to defined service levels) for access to information requests

Improve resources resilience and campus-wide efficiency

Priorities

- **Integrate major campus systems data with the *Common Data Platform*** (CDP) — a multi-year project through FY27

- **Refine the new annual (multi-year) budget development cycle** — continue to evolve the financial health review cycle into a formal budget development and approval process

- **Academic resource models** — monitor the newly implemented academic disciplinary divisions' funding models for improvement, refinement, and potential expansion to other divisions

- **Operational reporting & BI visualization tool(s)** — integrate tool(s) with CDP, develop enhanced corporate reports, and train campus report owners to develop their own assets

Potential Metrics / KPIs

- Track progress of prioritized backlog of major campus operational systems for integration with CDP's data repository

- Assess, track progress/key milestones for
    - Reporting tool(s) and BI (business intelligence) tool(s) assessment effort;
    - Inventory existing reports and their attributes;
    - Establish prioritized backlog of corporate reports (enhancements and new) to be developed;
    - Track participation in report development training;
    - Track utilization of current *InfoView* reports

Improve BAP operational strength; re-balance skills, focus, and alignment with broader UCSC goals

Priorities

- **Invest in our people** — focus on staff retention, professional development, and workload balancing/sharing; create/model an inclusive, collaborative, and positive culture where staff grow; feel valued; and empower them to take initiative.

- **System modernization** — identify non-redundant cost-effective, future-looking tools to modernize (upgrade or replace) the systems BAP manages

- **Continuous improvement** — continue practice of reviewing output and outcomes for opportunities to improve services, and initiate problem-solving to create more value for BAP's constituencies

Potential Metrics / KPIs

- Staff development and skills outcomes, employee satisfaction (survey)

- Leadership and constituent satisfaction with and support of strategic realignment efforts (survey)

- Progress toward the identified continuous improvement projects/evaluation of outcomes

- Participation in cross-functional, collaborative initiatives/working groups

- Monthly review of status of recurring tasks/allocations