

Budget & Planning

Mission Statement

The mission of the Office of Budget and Planning is to provide timely, accurate, and useful information to decision makers to assist them in making decisions that are congruent with the vision, mission, and goals of LSU and A&M College.

Strategic Plan

Strategic Goal 1: Maintain a suitably staffed, effective organization

Action Item 1.1: Recruit and retain the best and brightest staff

Action Item 1.2: Provide travel and training opportunities to remain at the forefront of national trends

Strategic Goal 2: Continue to meet evolving needs for campus information

Action Item 2.1: Meet the increasing external information requests

Action Item 2.2: Quickly adjust to changing requirements for information reporting

Action Item 2.3: Develop, submit, and maintain the institution's annual budget.

Strategic Goal 3: Provide the information needed for effective decision making

Action Item 3.1: Provide just in time useful information to decision makers

Action Item 3.2: Empower decision makers to find information, providing electronic access

Action Item 3.3: Partner with campus units to ensure that data is collected consistently and in such a way as to be useful for future reporting needs. Encourage the review of data and data collection processes by data stewards.

Strategic Goal 4: Effectively respond to campus changes

Action Item 4.1: Adjust practices to fit the new ERP as needed.

Action Item 4.2: Work with the ERP Task Force to ensure that the new ERP meets the budget and planning needs of the institution.

Strategic Goal 5: Identify ways in which B&P information may improve the institution.

Action Item 5.1: Enable the identification of efficiencies through the application of institutional information.

Risk Assessment: The successful completion of these goals relies upon the continuity of people and funding. Should funding or people be lost, Budget & Planning would have a difficult time meeting its goals in a timely fashion. At the extreme, not meeting these goals could result in the loss of funding and accreditation. Key retirements or attrition in the next few years would result in the loss of institutional knowledge and impede progress. These goals also rely heavily upon the validity, continuity and security of the institution's data and data systems. Human error and the upcoming migration to a new ERP encompass the risks associated with data integrity.

Office of Budget & Planning
2014-2015 Annual Review
May 15, 2015

1) Short discussion on personal accomplishments of the past year.

FY 2014-2015 was both an exciting and challenging year for LSU. Some examples are: the University brought in one of its largest and well prepared freshmen class; the faculty and staff received a merit increase for the second year in a row after previously going four years of no increases; the WISE program was created by the Legislature and the University created a plan that allocated funding for 26 new tenure track faculty in strategic focus areas; LSU received relatively stable state funding but continued to struggle as State appropriations have declined while student tuition continued to increase over the last six years; LSU faced strong resistance in gaining additional autonomy and flexibility but managed to begin the implementation of a self-insured risk management program and a pilot procurement program; the selection, purchase, and replacement of LSU's legacy administrative computer system began; and the realignment of the President's Office and Law Center with the main campus continues. Until a stable funding base is established for the University, the future will continue to present challenges as well as opportunities. It is critical that LSU continue to build efficiencies amongst the pressures of declining institutional financial resources. We must keep Flagship 2020 as our overall guide and continue to meet the goals of LSU (learning, discovery, engagement, and diversity). The Office of Budget and Planning has continued to play a critical role in these challenges and opportunities due to the office's mission and staff's knowledge and experience. With the recent retirement of long-time employees in the office and another upcoming retirement, the office has and will continue to position itself through its hires and upgraded/revised methodologies to provide better service to the University and its constituents. Our office will continue to provide clear, frequent, written, and oral communication to the University's executive leadership and other decision makers across the campus. In spite of limited financial resources, we will strive to have the Budget & Planning staff attend at least one professional seminar, workshop, and/or conference each year for professional advancement and to help the office stay on the forefront of new issues and technology in Higher Education.

2) Top Five Accomplishments of the Office of Budget and Planning

- A. Administered and implemented the FY 14-15 Operating Budget process for the institution along with the merit increase program for faculty and professional staff. A new budget program developed by Budget & Planning successfully provided increased efficiencies by electronically distributing the operating budget development documents and final operating budget sheets. The office also completed all of the required Board of Regents and Board of Supervisors operating budget forms. The operating budget process is used to allocate resources to institutional units in an effort to accomplish the strategic goals of the University.

- B. Actively involved with the transition working group and the Southern Association of Colleges and Schools Commission on Colleges (SACSCOC) reporting requirements for LSU's reaffirmation of accreditation due to realignment with the Hebert Law Center. Institutional Research staff are currently working with academic colleges and the Office of Academic Affairs to prepare the University Roster of Credentials and Competency. This includes reviewing faculty assignments, faculty degrees, and courses taught for the spring 2015 semester. The office also has representatives on the transition working group, LSU Institutional Effectiveness Review Board (IERB), and is providing information and oversight for the completion of several of the financial principles required by the accreditation review. The majority if not all goals of Flagship 2020 are dependent on the University receiving accreditation.
 - C. Increased efficiencies through the application of institutional information. Staff members enhanced the Enterprise Information System (EIS) by incorporating Program Review reports into this single source secure environment. In addition, the office further aligned EIS and Program Review by using consistent methodology across reports and inserting additional explanatory notes for published data.
 - D. Met evolving needs for campus information. In times of dwindling state appropriations, Budget & Planning has met the increased external reporting requirements from the Legislature, LSU Board of Supervisors, and the Board of Regents. The office completed federally mandated Integrated Postsecondary Education Data System (IPEDS) Surveys for all of the LSU campuses that use the LSU financial systems. The office also prepared the Board of Regents employee salary data for these campuses. In addition, Budget and Planning staff completed the National Science Foundation Survey, surveys for publication by external entities, and participated in peer university data exchanges. Department Metrics tables created in 2013 were revised to incorporate additional data elements to assist the Provost with internal comparisons across departments and colleges on a variety of indicators. The department metrics, surveys, and peer comparisons provide baseline and benchmark information for development and comparisons of the components of the Flagship 2020 strategic goals. Finally, staff created and published the first two issues of the LSU Institutional Research Newsletter in fall 2014, with a third issue to be published in May 2015.
 - E. Served the University community by being selected to numerous institutional committees. In addition, office staff members represent LSU on multiple student, professional, and community committees and boards such as campus student organization advisors, Southern Association for Institutional Research (SAIR), Southern University Group (SUG), the Louisiana Association for Institutional Research (LAIR), Shaw Center for the Arts, and American Heart Association. This type of commitment is in direct alignment with the Engagement goal of Flagship 2020.
- 3) Summarize the top five goals of your unit(s) for the upcoming year, strategies that will be employed towards achieving those goals, and explain how those goals relate to the priorities for Flagship 2020.

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vision, mission, and goals of LSU and A&M College. This mission and achievement of the goals listed below will help the University be successful in accomplishing the Flagship 2020 plan.

- A. Improve access to information by implementing electronic document storage and distribution systems. This will enable constituents to retrieve data in a more efficient manner.

Strategy: Provide useful information electronically to empower decision makers and develop electronic distribution systems for reporting and budget processing.

- B. Effectively respond to campus changes, including LSU System transition to “University Administration” and the realignment of the Hebert Law Center with the main campus.

Strategy: Adjust policies and procedures to correspond with the new LSU structure and new executive administrative staff requirements. The Office of Budget and Planning has a representative on the Law Transition Working Group (TWG) and works with the group to recommend alignment strategies. In 2015-16, the office will revise procedures to include the Law Center in campus data reporting and budget development.

- C. Serve on Workday Committees to ensure the new enterprise information system meets the budget and institutional research needs of the university.

Strategy: In March 2015, LSU began implementation of Workday HCM and Finance. The office has four representatives on committees who are attending meetings and monitoring the activities and developments of the Workday project, ensuring institutional reporting and budgeting needs are defined in Workday.

In addition, LSU continues to play an integral role in the Student Design Partnership with Workday and eight other higher education institutions. This program is designed to provide guidance and feedback to the Workday Product Managers during the design and development of Workday Student. A Budget and Planning staff member continues to serve as a campus representative and assists in providing information about LSU’s functional requirements as well as its vision for the student service delivery.

- D. Identify ways in which information provided by Budget and Planning can improve the institution.

Strategy: Assist with the implementation and training of campus constituents on use of Academic Analytics, a custom business intelligence data and solutions product for research universities, that LSU has recently purchased.

- E. Maintain a suitably staffed, effective organization

Strategy: Recruit and retain the best and brightest staff and provide them with the appropriate training opportunities to remain at the forefront of national trends. There is currently an Administrative Analyst position in the Budget division that is vacant. In

addition, an employee with 35 years of experience at LSU will retire from the Institutional Research division in June 2015. Our office will work with HRM to identify the appropriate replacement positions that will strategically position Budget & Planning to be more effective and efficient in the services we provide to the University.

4) Maximize productivity and improve efficiency of serving your constituency

The Office will continue to seek efficiencies through electronic processes by creating new programs or adjusting existing programs to effectively provide more timely and accurate information to decision makers. Examples of this are the new electronic process for the budget development documents and the enhancements made to the Enterprise Information System. This process will also allow the office to more efficiently meet the information requests from federal, state, and Legislative levels as well as the Board of Regents and Board of Supervisors.

5) Institutional process changes that should be considered for improving success, efficiency and service

- A. Attainment of many of the office's goals depends heavily on information technology support and the priority that Information Technology Services (ITS) and Financial System Services (FSS) assigns to project development. While the implementation of Workday HCM and FIN modules is expected to improve many institutional processes, in the short term, ITS and FSS have limited resources and therefore may not have the ability to complete projects that are not classified as an emergency. Additional resources provided to ITS or Budget & Planning would improve the services and efficiency of the office.

- B. The additional workload on the office relating to inquiries from the Board of Regents, Board of Supervisors, and Legislature diverts time away from other beneficial initiatives. The elimination of external reporting requirements that are tedious and not useful would improve the success and service provided by the office to the University.