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Introduction

The Office of University Planning (UP) services many aspects of the University community, specializing in the coordination of the University’s strategic planning cycle, integration of planning and budgeting functions, analyses of operations, and revisions of plans based on outcome assessments. Within this broad realm, functional responsibilities include:

A. Coordination of University Strategic Planning

UWF has a strong, aggressive, and participatory bottom-up strategic planning approach. The University Planning Council (UPC) participates heavily in the process. The UPC updated the University Strategic Plan in May 2003, and the University Board of Trustees (BOT) confirmed the updated Strategic Plan in June, 2003. The Office of University Planning will continue to coordinate strategic planning activities including acting as liaison with the UWF BOT to keep members involved and informed about strategic planning matters.

B. Coordination of Institutional Evaluations, Analyses, and Reporting

University Planning acts as the front-line contact and clearinghouse for all UWF data, including formal data requests, survey completions, and ad hoc analyses and reporting for a wide variety of federal, state, and local agencies; other educational institutions and organizations; private businesses; other citizens; and on-campus faculty and staff; as well as the Florida Board of Education Division of Colleges and Universities (FBOE/DCU) and the University Board of Trustees.

C. Production of Institutional Research, Analyses, and Reporting

The Office of University Planning evaluates, analyzes, and reports on a wide variety of UWF activities to a diverse body of users, both internal and external.

D. Development and Coordination of Management Information Retrieval Systems and Applications

University Planning continually seeks to develop and implement management information retrieval systems and applications to assist its customers in accessing appropriate data and reports. Such applications include web-based fact books and other online data presentations. During 2002-2003, UP implemented the University Planning Information
Center (UPIC), which provides online access to both strategic planning and profile information at four levels: University, Division, College/Unit, and Department. Also, UPIC provides web-based access to fact books and many publications and procedures of UP, the University Assessments System, and many other developed or developing systems. UPIC is the first place to go for University data and information.

E. Coordination of Data Administration (formerly BOR Data Submissions [Hit List])

The former Board of Regents (BOR) Office of Information Resources Management was transferred (organizationally) to the Florida Board of Education (FBOE) and continues to collect data for the Board of Governors, Florida Board of Education (Education K-20 Board and Chancellor), Legislature, Governor’s Office, and Federal reporting purposes. Therefore, with the transition of governance, this functional responsibility of University Planning did not change substantially, except for the possible elimination of some of the reports that were produced and submitted strictly for BOR use (note: Many BOR Data Requests originated externally to the BOR and will be requested either by the FBOE or directly from other agencies in the future. The BOR “buffered” UWF from many reports that are currently submitted directly to UWF for processing). A review of routine reports submitted to the FBOE via the “Hit List,” indicated that 172 reports were submitted in 2001-2002 and 161 in 2002-2003, indicating that the number of requests by the FBOE (for the FBOE, Governor’s Office, Legislature, or Federal agencies) actually increased by approximately 20% during the two years following the transfer of governance.

F. Coordination of Legislative Budget Planning and Submissions

Legislative Budget Planning at UWF is the result of broad-based participation through the strategic planning cycle and process. Operating budgets and Legislative budget requests result from the planning process. The development of the Legislative Budget Request (LBR) continues as an Office of University Planning functional responsibility.

G. Coordination of Specific Academic Division Activities

Through 2002-2003, the Office of University Planning coordinated several activities related specifically to the Division of Academic Affairs, including:

a. Academic Program Development and Approval
The former Board of Regents (BOR) had a very stringent process and procedure for the development and approval of new programs.
First, the proposed programs must have been included in the State University System Strategic Plan (a five-year plan, with opportunity to update the new program list at midcourse) before the proposal could be developed and submitted to the BOR for approval. In most cases it took from three to five years to obtain approval to implement new programs. With the demise of the BOR, new program approval authority was transferred to the University Board of Trustees. Although the approach and ingredients required by the BOR for program proposals were good and effective, the process was revised to accommodate faster reactions to new program demands and opportunities, and to maintain a program inventory that best represents the needs of UWF and the Northwest Florida community. During 2001-2002 the Office of University Planning developed, and the University Board of Trustees approved a policy and procedure to enhance this process and to provide an efficient and timely Board of Trustees approval process. Procedures have been developed to report changes in program inventories to the FBOE or Chancellor in order to maintain system-wide information about current program offerings. During 2002-2003, the Office of University Planning coordinated the development and approval of several new programs. However, as of July 1, 2003, this responsibility was reassigned within the Division of Academic Affairs, and the Office of University Planning was assigned to the Office of the President.

b. Academic Program Reviews

The University of West Florida participates with the other ten state universities in an annual academic program review process that is intended to enhance the continuous improvements of degree programs. Under a newly-revised five-year program review process, UWF schedules its program reviews to coincide with college or discipline-specific accreditation reviews (if any) so that self-studies may be combined or at least performed concurrently. UWF program reviews are integral parts of our strategic planning and assessments procedure. Program reviews are legislatively mandated, but the procedure was determined locally and approved by the University Board of Trustees. A procedure for reporting program review results to the FBOE was developed to satisfy legislative requirements. The Office of University Planning has coordinated academic program reviews for several years. However, as of July 1, 2003, this responsibility was reassigned within the Division of Academic Affairs, and the Office of University Planning was assigned to the Office of the President.
c. Accreditation Reviews

The University is responsible for conducting accreditation reviews and reporting them to the BOT and the FBOE/DCU. System-wide listings of accredited programs are maintained at the FBOE/DCU level. The Office of University Planning coordinates and supports discipline-specific program accreditation activities. However, as of July 1, 2003, this responsibility was reassigned within the Division of Academic Affairs, and the Office of University Planning was assigned to the Office of the President.

d. Faculty Activity and Other Reports

Faculty Activity Reports are the responsibility of the universities and support the fulfillment of the 12-contact hour law. Faculty Activity Reports (FARS), Student Data Course Files (SDCF), and University Budget History Year Files (BHYF) are compiled by the FBOE/DCU's Office of Information Resource Management to develop the annual Expenditure Analysis (EA) report. This report is a very important cost-study tool in the legislative budgeting processes. The Office of University Planning is responsible for collecting and reporting faculty activity data via the Faculty Activity Reporting System (FARS) and the Instruction and Research Data File (IRDF). Although effective July 1, 2003, the Office of University Planning reports to the Office of the President, it continues to coordinate the collection and processing of Faculty Activity Reports and related activities.

H. Coordination of Special Activities and Projects

Special activities and projects unique to UWF provide many opportunities for the Office of University Planning to participate in a wide variety of activities.

I. Coordination of University Assessments

On March 1, 2001, the Office of University Planning assumed from the UWF Haas Center, the organizational and physical responsibility for coordinating University assessments. Assessment responsibilities include processing, analyzing, and reporting student satisfaction surveys. Survey results serve as a measure of UWF’s accomplishments and as a gauge for improvements for the next year.
During 2002-2003, UP revised the assessments procedures and developed an online survey process through the University Planning Information Center (UPIC). The process includes the online processing and analyzing of student satisfaction surveys at each level of student progression, from entering freshman to three years after graduation. Five survey instruments have been developed and an additional eight are under development. Assessment system testing has been completed and implementation will begin during the Fall Term, 2003.

Summary of University Planning Responsibilities

The Office of University Planning’s responsibilities include the following specific areas:

- Strategic Planning Coordination
- University Planning Council (and Committees) Coordination
- Institutional Research
- University Assessments Coordination (formerly CMIS Project)
- Faculty Activity Report System (FARS) and related Instruction and Research Data File (IRDF)
- Legislative Budget Requests
- Data Administration (Coordination and Submission of Data Requests and certification of official data files to FBOE/DCU)
- University Planning Information Center (UPIC) Development and Implementation (formerly the Data Warehouse Project)
- Student Retention Studies and Reporting
- Benchmarking Studies
- Salary Equity Studies
- Enrollment Reporting (Funded) and Enrollment Projections
- Funding and Funds-Generated Studies
- Accountability Development and Reporting
- Performance Based Program Budgeting (PB2)
- Accreditations Coordination (reassigned to Academic Affairs beginning 7-1-2003)
- Fact Book Development and Maintenance
- Federal Reporting (primarily Integrated Postsecondary Education Survey [IPEDS])
- Formal and Informal Survey Responses
- Five-Year Academic Program Reviews (reassigned to Academic Affairs beginning 7-1-2003)
- New Academic Program Planning and Request Processing (reassigned to Academic Affairs beginning 7-1-2003)
- Special Research and Analysis
- Liaison with FBOE/DCU Staff
Five-Year Plan

During the next five years the Office of University Planning (UP) staff will work within the UWF Strategic Plan Goals, Imperatives, and Priorities to fulfill UP’s specific responsibilities as described in the following eight UP Goals:

UP Goal 1: Provide coordination of the integration of University strategic planning into University budgeting, operations, and evaluations.

UP Goal 2: Provide support for the integration of planning, budgeting, operations, and evaluations with specialized data and analysis.

UP Goal 3: Provide support for University-wide strategic planning activities.

UP Goal 4: Provide timely and accurate data in support of decision-making activities related to planning, budgeting, operations, and evaluations of the University community.

UP Goal 5: Support the uses of accountability measures and activities in the processes of evaluating University activities.

UP Goal 6: Communicate to the University community information and issues related to UP responsibilities.

UP Goal 7: Participate in University efforts to build a sense of “community” and to promote institutional renewal.

UP Goal 8: Enhance personal and professional growth and development of the University Planning staff.

Our Strategic Plan, Annual Updates, and Annual Report are presented on UPIC and contain the following major categories:

Vision
Mission
Values
Goals
Imperatives
Priorities
Accountability Measures
Measure Data
Data Analysis
Opportunities for Improvement
Summary of Planning Modifications
Resource Needs
Support Needs
Budget Request
Annual Update
Notable Accomplishments for each of the four UWF Goals
Annual Report

To review the entire UP Strategic Plan, go to our web site at: http://upic.uwf.edu

Notable Accomplishments During 2002-2003
During 2002-2003, University Planning accomplished the following notable activities related to the four UWF Goals (copied from the UP UPIC web site):

UWF Goal One: Promoting a learning environment that encourages the development of individual potential in students, faculty, and staff:

1. University Planning participated in institutional renewal and the building of a sense of “Community” by participating in university-wide functions and events and by providing university information and data for public dissemination.

2. University Planning coordinated university-wide assessments and accountability measures to support the evaluation of university activities. These included academic program reviews, new academic program development, surveys, and accreditation activities.

UWF Goal Two: Attracting and inspiring a diverse and talented student body committed to uncompromising academic excellence:

1. University Planning provided timely information to faculty, staff, and students concerning various issues related to the university via online University Fact Books, the University Planning Information Center (UPIC), and a multitude of publications and reports.

2. University Planning provided "real world" experience to several students who participated in the development of major information systems and reports as part of their part-time employment in the Planning Office. Additionally, University Planning assisted students with narrative and statistical information for class projects, reports, theses, dissertations, etc., in an effort to enhance students' understanding of UWF policies and procedures and to involve students in university activities.
UWF Goal Three: Providing solutions to educational, cultural, economic, and environmental concerns:

1. University Planning provided information and statistical data to support the many activities of the University community. These included online fact books, publications, and reports, as well as routine and ad hoc requests for specific kinds of information and data.

UWF Goal Four: Managing growth responsibly through focus on continuous quality improvement of programs and processes:

1. University Planning developed and implemented an online information system, the University Planning Information Center (UPIC) to display the strategic plans, resource and support needs, budget requests, annual updates, and annual reports of each UWF organizational unit (UWF, Divisions, Colleges, Departments, Units) (more than 180 accounts).

2. University Planning provided the coordination of planning activities in support of integration University strategic planning into University budgeting, operating, and evaluating processes.

3. University Planning provided timely and accurate data in the support of decision-making activities related to planning, budgeting, operating, and evaluating, processes of the University community.

4. University Planning responded or coordinated the responses to more than 400 data requests, including internal and external, federal, state, Florida Legislature, and the Florida Board of Education.

5. University Planning developed and enhanced policies, and streamlined procedures related to faculty activity reporting, new academic program development, academic program reviews, etc., as part of the University’s continuous improvement cycle.

6. University Planning continued to enhance the personal, educational, and professional growth and development of its staff so that they may provide "best practices" approaches to their responsibilities and activities.
Strategic Plans – University Planning Staff Personal Imperatives

Members of the Office of University Planning Staff adopted the following personal imperatives:

- Coordinate to the best of our ability the planning, evaluation, and resource analysis functions of the University

- Analyze, interpret, and communicate to the University community, in positive, dynamic, and progressive ways, the various planning, evaluation, and resource analysis rules, regulations, and procedures

- Collect and publish various data in support of the decision-making processes of the University

- Participate in and coordinate the on-going development of computer applications as they relate to planning, evaluating, analyzing, and reporting processes

- Coordinate the formulation, preparation, and publication of various documents such as Legislative budget requests, strategic planning documents, budget enhancement plans, electronic Fact Book information, and related documents

- Play a leadership role in the translation of UWF strategic plans into action

- Service the data needs of the UWF community by being sensitive to and responding in a timely and efficient manner to requests from faculty, staff, students, community, as well as state, federal, and private organizations

- Support the responsibilities of UP by working as team members, assisting in special projects and sharing in the overall workload

- Demonstrate loyalty to and concern for UWF by participating in and supporting activities and events outside the realm of work assignments

- Continually strive to improve working relationships both on and off campus as positive representatives of UWF

- Monitor the assignments of and responses to the various data requests from the Florida Board of Education, maintaining UWF’s outstanding record for quality and timely responses to the outstanding data request listing (Hit List), and striving to reduce both the volume and impact of such requests on the workload of UWF staff

- Take advantage of training opportunities and professional development to sharpen personal and professional skills and to perform work assignments effectively and efficiently
• Designate specific periods of time and effort to enhance personal relationships around the campus to improve personal service and UP’s service to the UWF community

• Maintain an awareness of and an appreciation for the broad responsibilities and opportunities of The University of West Florida and to enhance personal contributions to UWF’s total mission

Office of University Planning - Priorities for 2003-2004

1. Continue to participate in the transition of governance to the University Board of Trustees and the transition of new administration and organization, helping to facilitate a smooth, effective, and exciting entry into UWF’s new era.

2. Develop bold proposals for enrollment planning and legislative budget requests and other initiatives, as UWF continues a period of strong enrollment growth and the resulting need for new resources.

3. Continue to develop the University Planning Information Center (UPIC), providing web-based access to UWF data. This phase will include further development of University assessments, faculty activity reporting, and portfolio approaches.

4. Continue to provide the coordination of planning activities in support of the integration of University strategic planning into University budgets, operations, and evaluations.
   a. Continue to coordinate University planning cycle activities
   b. Continue to coordinate University Planning Council activities
   c. Continue to encourage wide participation in the planning processes

5. Continue to coordinate UWF responses to data requests (Hit List items, primarily official data files and legislative reports) in a timely and accurate manner.

6. Continue to publish and maintain data on UPIC web pages to support the need for data. This includes detailed and summarized fact book presentations and links to related data.

7. Continue to coordinate UWF responses to the Florida Board of Education (FBOE), Governor, and Legislature regarding accountability measures, performance budgets, legislative budget requests, and related issues.

8. Continue to improve the distribution, collection, analysis, and reporting of University assessments documents in response to the strategic planning cycle and in support of management decision-making activities.
9. Continue to maintain a dynamic planning calendar that includes time frames for campus-wide planning, budgeting, evaluating, and operating activities in support of strategic and organizational planning.

10. Continue to develop and publish informational documents and electronic displays to communicate items and issues of interest to the University community.

11. Continue to coordinate plans to assure that the budget allocation process is related directly to and is a result of the Strategic Planning processes.

12. Continue to support the development of web-based data systems and other data systems to support the management and decision-support needs of the University.

13. Participate in UWF activities in support of promoting a sense of community and pride within UWF.

14. Continue to enhance personal and professional growth and development of the University Planning staff so that we may provide the best services and best practices to the University community.

University Planning – Boldly Planning for the Future

Changes in UWF administration and organization and the continuing transition of governance to the University Board of Trustees will have great impacts on the activities and responsibilities of the UWF Office of University Planning over the next several years. University Planning will continue to coordinate the implementation of strategic planning initiatives and activities as UWF continues to develop and grow toward becoming the university that it envisions: the premier creative, student-centered university focused on excellence. The Office of University Planning staff look forward to supporting the planning and informational needs of the University community as UWF moves into its new era.

General Information

For more information about the Office of University Planning go to the UWF UPIC web pages and link to Strategic Planning, Institutional Research, UWF Fact Books, University Assessments, and other topics related to the Office of University Planning, or call or visit the staff.

Office of University Planning, Building 11, Suite 215
Phone: 850-474-2212
SunCom: 680-2212
Comments and Suggestions

The Office of University Planning staff would be pleased to know your comments and suggestions about this document or other documents or services provided by this office. Please share them with us as we strive to improve.

University Planning – Organizational Chart

The Office of University Planning organizational chart is presented on the following page. Please note that during 2002-2003, the University Assessments Position (A&P) was reclassified to Secretary and later reclassified to Office Manager. Responsibilities of the assessments position were assigned to other staff within University Planning, and the assessments process was developed as an online application within UPIC. Also, as of July 1, 2003, the Office of University Planning was reassigned from the Academic Affairs Division to the President’s Division, reporting to the Executive Vice President.
University Planning Vision:

to foresee and fulfill the strategic planning and information needs of the University community

University Planning Mission:

to support the strategic planning, legislative budgeting, institutional research, data retrieval, resource and data analysis, and evaluation needs of the University community

University President
John Cavanaugh
10001-000 1.0 FTE Faculty 9001-P0

Executive Vice President
Hal White
10027-001 1.0 FTE Faculty 9001-V1

Office Manager
University Planning
Kay Sasse
11329-000 1.0 FTE USPS 0716-00

Associate Vice President
for Planning
Jerry Norris
10441-000 1.0 FTE Faculty 9003-V5

Program Assistant
University Planning
TBA - Future Position
TBA 1.0 FTE USPS 0716-00

Computer Systems Control Coordinator
Keith King
10965-000 1.0 FTE A&P 9475 N1

OPS Staff Assistants
as needed
(Assessments/Strategic Planning, Etc.)

Assistant Director of Institutional Research
Elaine Lavender
10018-000 1.0 FTE A&P 9308-T1

Assistant Computer Systems Control Coordinator
TBA – Future Position
TBA 1.0 FTE A&P

OPS Student Assistants
as needed
(UPIC/Institutional Research/Etc.)

Senior Statistician
University Assessments
Sharon Brim
10966-000 1.0 FTE USPS 3120-00

Systems Development Assistant
Comp Tech Support Web Assistant
Malika Hernandez
Student Assistant

Assistant Director of Institutional Research
Elaine Lavender
10018-000 1.0 FTE A&P 9308-T1

University Assessments
Sharon Brim
10966-000 1.0 FTE USPS 3120-00

University Planning Vision:

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