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UNIVERSITY  
of ALASKA  
*Many Traditions One Alaska*

## MEMORANDUM

DATE: June 27, 2018

TO: Chancellors

CC: Summit Team

FROM: Jim Johnsen, UA President *James R. Johnsen*

SUBJECT: UA Goals & Measures Guidance

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At the Board of Regents' retreat earlier this month, we heard reaffirmation from the Board of its support for the five goal areas and associated outcome measures, formally adopted last fall. The goals and measures represent the fundamental direction UA must head, and are intended to be used widely for a variety of purposes, including: evaluation of initiatives, State of Alaska Office of Management and Budget (OMB) and internal UA performance evaluations, and budget development.

Over the summer, we will be working with you to update the out-year targets based on the FY18 performance, the FY19 budget and any other relevant factors (see attached detailed timeline). As the FY19 budget cycle was our initial year, there are ways we can continue to refine the process. In FY19, we used the FY25 target for each of the goals and measures, with an interpolation method to estimate FY18-FY24. For FY20, the goals and measures setting will also be informed by each university's projections based on current or planned strategies expected to impact the goals and measures. Gwen Gruenig will serve as coordinator for this effort.

### Designated Liaison

As chancellors, you are ultimately accountable for coordination and development of final deliverables related to university goals, measures and strategies. In practice, it is valuable to have a single conduit to represent, communicate and coordinate on behalf of your organization. Based on your feedback, the individuals listed below will serve in this liaison role for UA Goals and Measures.

Coordinator – Gwen Gruenig/Paul Layer  
UAA – Provost  
UAF – Provost  
UAS – Provost  
SW – Director Strategy, Planning & Budget

Each liaison will work in coordination with Gwen Gruenig to provide an inclusive response on behalf of your university. Gwen will provide coordination between the liaisons, system councils such as the Academic Council and Institutional Research Council, as well as the Summit Team.

Examples of issues in need of coordination include:

1. Adding high-value non-credit workforce credentials to the measures.
2. Refining the numerator and denominator calculation for the Teacher Education performance measure.

#### Technical Updates to approved goals and measures

I have tasked the Institutional Research Council to coordinate development and submission of any proposed technical calculation updates over time for outcome measures adopted by the BOR. Proposed changes will then go to the Executive Council for feedback.

#### Purpose and Utilization

Details about how goals, measures, and supporting organizational strategies and investments should be tracked and utilized for budget development, advocacy, distributions and accountability will be incorporated into UA's annual budget and planning processes.

JRJ

UA Metric and Key Indicator Working Calendar/Timeline, Last Updated June 25 2018

Responsible for Deliverable:

UAA, UAF, UAS, SW	UA	BOR	SoA
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Completion of Phase-in -->

Steady-state -->

Deliverable	Jun-18	Jul-18	Aug-18	Sep-18	Oct-18	Nov-18	Dec-18	Jan- to Mar-19	Apr-19	May-19	Jun-19	Jul-19	Aug-19	Sep-19	Oct-19	Nov-19	Dec-19
Monitor effectiveness of strategies in place to progress toward goals; adjust as needed	Ongoing																
Technical Measurement Definition Refinement proposals and approval, in order to be considered for upcoming cycle.	FY20 Budget Year								FY21 Budget Year	FY21 Budget Year	FY21 Budget Year						
Clarifying guidance regarding UA metrics and associated strategy metrics utilization and deliverables for budget development support and budget distributions, including SoA OMB performance evaluation.	FY20 Budget Year								FY21 Budget Year								
Preliminary performance report for FY close (internal vetting; includes info on metric changes proposed for upcoming cycle, comparison of old vs new values, etc.)	FY20 Budget Year										FY21 Budget Year						
Preliminary performance report for FY close due to BOR subcommittee on Presidential Performance compensation		FY18 Observed & FY19-20+ Target/ Goal										FY19 Observed & FY20-21+ Target/ Goal					
University, SW performance evaluation info due to UA and via SoA OMB Performance Website, reflecting upcoming cycle budget guidance			August 15 due date for FY20 Budget Year										FY21 Budget Year				
Update to Key Performance Indicators due to SoA. University, SW and UA performance evaluation info submitted via SoA OMB Performance Website, reflecting upcoming cycle budget guidance, for presentation at UA's "Heads Up" Meeting			August 30 due date for FY20 Budget Year										FY21 Budget Year				
SoA OMB "Heads Up" Meeting				FY20 Budget Year										FY21 Budget Year			
All performance evaluation info published via SoA OMB Performance Website, reflecting any component structure changes				Sept 18 for FY20 Budget Year										FY21 Budget Year			
Full BOR reviews and approves prior FY Presidential performance pay, and current FY Presidential performance compensation framework.				Sept 13-14 for FY18 Observed & FY19-20+ Target/ Goal										FY19 Observed & FY20-21+ Target/ Goal			
BOR approves upcoming cycle budget request						Nov 8-9 for FY20 Budget Year										FY21 Budget Year	
Performance evaluation info published via SoA OMB Performance Website locked						Nov 17 for FY20 Budget Year										FY21 Budget Year	
Governor's budget bills; fiscal and debt summary; department reports, 10-year fiscal plan and performance measures released via SoA OMB Website (December 15)							FY20 Budget Year										FY21 Budget Year