

University Financial Management (UFM) Background

Provost and Executive Vice President Ed Feser and Vice President of Finance and Administration Mike Green sponsored the University Financial Management Working Group (UFM) in October 2019.

There is a great need to substantially improve the capacity of OSU's academic leaders and other university managers to prioritize and optimize academic unit costs and revenues strategically.

Executive Sponsors

- Ed Feser – Provost/Exec. VP
- Mike Green – VP Fin. & Admin.

Steering Committee

- Heidi Sann – AVP Fin. & Controller
- Sherm Bloomer – AVP Budget & Resource Planning
- Jon Dolan – Assoc. VProvost, Deputy CIO&CDO
- Mark Johnson – Manager, Arts & Sciences Business Center and Special Projects
- Tom Fenske – Dir. Fin. Strategic Srvcs.
- Impact Studio and Outside Consultant

- University Information & Tech. (UIT)
- Tool Teams (Representatives from DFA and Colleges)
- Web Design Team

UFM Phase 1
Oct 2019 Kickoff

Interviewed 12 Leaders in 3 Colleges
Received 300+ Functional Needs

Combined Responses into 27
Specific Needs

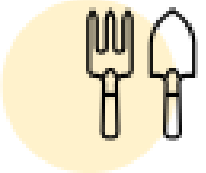
Identified 4 Needs with
Highest Impact

- Common Set of Reliable, Timely Budget Reports
- Budget Scenario Analysis/Forecasting Tool
- Position Management System
- Enrollment Data and Forecasts

Phase 2 – Create Tool Teams
and Develop Prototypes

UFM Phase 2 Pilot Schedule

December 6 – Initial Launch



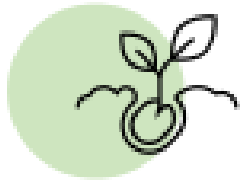
The UFM portal will launch and initial resources and reports will be available.

December 20 - Update 1



Critical bug fixes and new content released in the portal.

January 24 – Update 2



Enhancements to existing dashboards and resources and new content released. Changes and modifications based on feedback from users and UFM prioritization

March 18th – Update 4



HCI user-experience based enhancements and new content released.

February 18th – Update 3



HCI user-experience based enhancements and new content released.

April – Final Update



The update will include all prioritized and available enhancements to date.

Wrap up and Report-out



At the end of the pilot, we will report-out on Phase 2, including roadmaps for Release to Production and Phase 3 Budget Scenario Analysis Tool

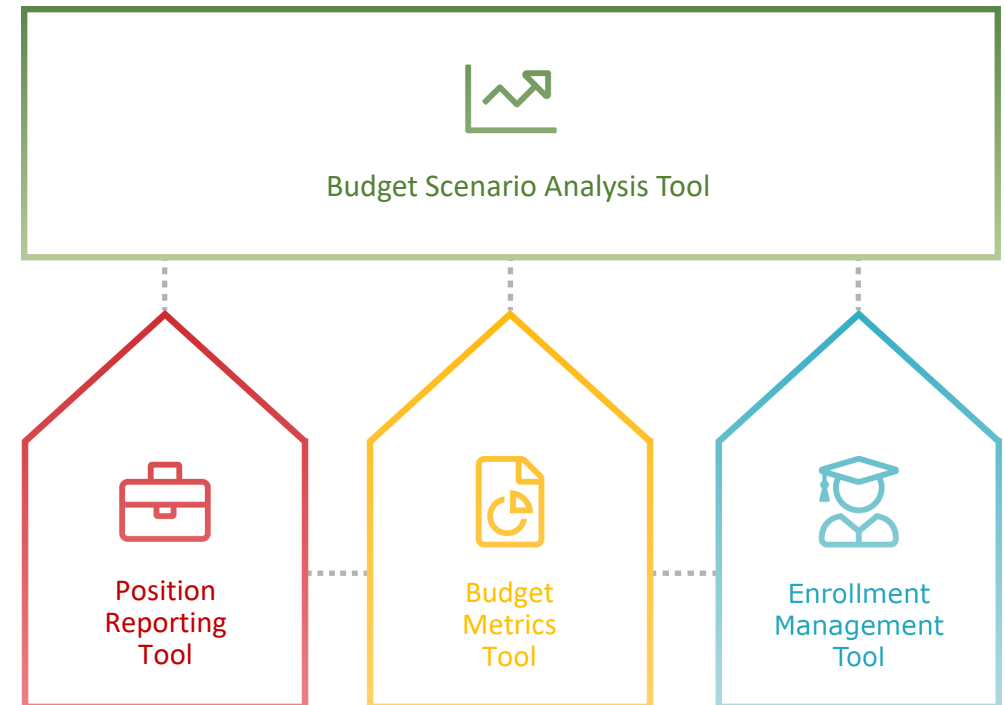
UFM Suite - Phase 2

The UFM Suite is currently comprised of three integrated modules, which provide essential information for budgeting and decision analysis at the college level:

- Integrated modules:
 - Position Reporting (previously Position Management)
 - Budget Metrics
 - Enrollment Management
- Essential information:
 - 5-year history baseline
 - Reliability of data
 - Key metrics tracking, comparison
 - Visualization (Tableau Dashboards)
 - Ease of use and access

UFM Suite - Phase 3

- Budget Scenario Analysis Tool (previously Bottoms-Up Forecasting)
 - 2 – 3 year planning horizon
 - Create and compare multiple “what-if” scenarios
 - Enable improved decision-making



ENTERPRISE DATA ECOSYSTEM: ROAD TO LAUNCH

