Appendix 14.   Planning – Gantt Template Example from Finance Theme

This appendix includes a partially populated Gantt template with planned activities in support of goals in the finance theme. The template itself is an Excel file, but this appendix is presented as a PDF with rows and fields populated by the financial theme working group. The Gantt template (Excel file) is also available upon request for review.

ALIGN FINANCIAL MODEL WITH INSTITUTIONAL VISION

Executive Sponsors: Pratima Gandhi & Chris Richards

Implementation Co-Chairs: Erin Hintz & Marty Loy

Implementation Team: Rachel Brashier, Jason D'Acchioli, Katie Jore, Tina Kramer, Nerissa Nelson, Christina Rickert, Brian Sloss

Legend:

Goal	Outcome	Metric		

Project Start Date: 7/1/2021

Milestone Description	Purpose Made Possible Goal	Responsible Division(s)	Category	Assigned To	Progress	Start	No. Days	Resource Needs
Align university expenditure levels with available resources. Annual expenditure levels in university departments will be within the annual state budget allocation or the program revenue generated.			Goal			7/1/2021	365	
The annual operating budget will be right-sized to sustainable enrollment levels.	Finance 1.1		Outcome		50%	7/1/2021	365	
Quarterly budget to actual reports for main operating funds will be sent to each Vice Chancellor and/or Dean as well as campus leadership.	Finance 1.1	Business Affairs	Metric		25%	7/1/2021	90	
Controller will collaborate with campus units operating with a sustained financial loss to develop a financial recovery plan.	Finance 1.1	Business Affairs	Outcome			7/1/2022	365	
Deans and Directors will be responsible for allocating and monitoring resources within their units and ensuring financial stability.	Finance 1.1	All Divisions	Outcome			7/1/2023	180	
Utilize financial models that will be data informed, transparent, objective, and action oriented. The financial models will inform decisions to allocate and reallocate resources.			Outcome			7/1/2025	365	
Educate campus stakeholders on the interdependency of resources for all university divisions.	Finance 1.2							
Ensure the various financial models work together to form an overall cohesive financial structure.	Finance 1.2							
Ensure transparency of decision-making factors.	Finance 1.2							
Increase the strategic reserve to support one-time strategic investments.	Finance 1.2		Goal			7/1/2021	180	
Define the desired strategic reserve level.	Finance 1.2							
Identify funding sources for the reserve.	Finance 1.2							
Implement a clearly defined, transparent process for distributing funds.	Finance 1.2							
Finalize the components of the activity-based budget model currently developed for the curricular colleges. Enhance data accuracy.	Finance 1.2							
decisions will dictate funding for curricular/non-curricular portions of the budget; communicate these decisions broadly.	Finance 1.2							
program revenue units and implement selected model(s).	Finance 1.2							
Create a framework for annual budget adjustments.	Finance 1.2							
Title 3								
Task 1								
Task 2								
Task 3								
Task 4								
Task 5								
Title 4								
Task 1								
Task 2								
Task 3								
Task 4								
Task 5								

YEAR 1 | YEAR 2 | YEAR 3 | YEAR 4 | YEAR 5

Jul Aug Sep Oct Nov Dec Jan Feb Mar Apr May Jun (repeated across years)

To add more data, insert new rows ABOVE this one