

THE UNIVERSITY OF IOWA

REVIEW OF THE OFFICE OF THE SENIOR VICE PRESIDENT FOR FINANCE AND OPERATIONS

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I. Introduction

This academic review of the Office of the Senior Vice President for Finance and Operations (“F&O”) is done in accordance with Section 28.4 of the University of Iowa Operations Manual.¹ During the Fall 2018 semester, the President’s Office and Faculty Senate leadership formed a committee charged with reviewing F&O and the current Senior Vice President for F&O, Rod Lehnertz. The present report concerns only F&O. It will remain publicly available on the Faculty Senate’s website. The report on Senior Vice President Lehnertz constitutes a confidential personnel record that will be filed separately with the President’s Office.

a. Process

As set forth in the Operations Manual, the academic review committee consisted of six faculty members and an external reviewer.² Faculty Senate Secretary Joseph Yockey (College of Law) served as the committee’s chair. The committee’s faculty members were Ramji Balakrishnan (Tippie College of Business), Barbara Eckstein (College of Liberal Arts and Sciences), Megan Foley Nicpon (College of Education), Alicia Gerke (Carver College of Medicine), and Lia Plakans (College of Education). Brian Burnett, the Senior Vice President for Finance and Operations at the University of Minnesota, kindly agreed to serve as the committee’s external reviewer.

The Operations Manual requires that the review of F&O begin with a self-study prepared by that office and shared with the committee. F&O’s self-study was completed in early Fall 2018 (attached to this report as Appendix A). The committee’s review of the self-study prompted a request for additional information. The committee’s written request is attached as Appendix B. This request led to the production of several additional documents related to F&O’s budget and responsibilities.

Next, the committee drafted a series of questions for use during the fourteen on-site interviews that took place on campus from December 3-6, 2018. The interview schedule is attached as Appendix C. After the interviews were completed, a few committee members had brief follow-up conversations with various members of the campus community to clarify issues that arose during the interviews.

¹Reviews of Central Administration, Chapter 28.4, University of Iowa Operations Manual, *available at* <https://opsmanual.uiowa.edu/community-policies/academic-review#28.4>.

² The committee also wishes to recognize Laura Zaper, Administrative Services Coordinator for the University of Iowa Faculty Senate. We are immensely grateful to Laura for her guidance and outstanding support throughout the review process.

The committee also distributed two electronic surveys to various campus stakeholder groups. One survey went to all faculty with appointments of at least 0.50 FTE (tenured, tenure-track, clinical, research, instructional, adjunct). The second survey went to approximately 150 university administrators and staff members who were identified as having routine and direct contact with F&O personnel. Copies of both survey templates are attached as Appendices D and E, respectively.

b. Organization

What follows is a record of the committee's findings and recommendations. Part II of the report provides a summary of the information learned during the on-site interviews. F&O is a large unit with a diverse range of responsibilities, including some that defy easy categorization within a single unit or division. Thus, for ease of reference, Part II contains three sub-parts: (a) *Finance*, (b) *Operations*, and (c) *Decision-Making and Organization*. Part III then describes the quantitative results of our surveys, as well as the qualitative and narrative comments received from respondents. Finally, Part IV sets forth the committee's recommendations.

II. Interview Findings

a. Finance

The finance services provided by F&O relate to the university's controller and treasury operations,³ budget management,⁴ real estate management (acquisitions and leasing), contracting, purchasing, risk management, accounts payable, flood recovery, and travel and expense reimbursement (i.e., Shared Services). Our primary source of information about these activities came through a series of interviews with Rod Lehnertz (Senior Vice President for F&O), Terry Johnson (CFO and Treasurer), Cynthia Bartels (Director, Treasury Operations), Susan Klatt (Director, Financial Management and Budget), Cathy Hagen (Director, Budget Development), and Debby Zumbach (Associate Vice President and Director, Purchasing and Business Services).⁵

To gauge the impact of F&O's finance responsibilities on faculty and other university stakeholders external to the office, the committee also spoke to Peter Matthes (Senior Advisor to the President and Vice President for External Relations), Laura McLeran (Senior Advisor to the

³ Accounting, banking and cash management, billing and loan collections, bond indebtedness, research post-award administration, investment oversight, internal and external reporting, financial system oversight, financial planning and analysis, and strategic planning and analysis.

⁴ Developing and implementing the university's annual operating budget.

⁵ As previously noted, F&O is a large office with over 1,000 employees. The committee's review occurred under time and scheduling constraints that made it impossible to interview everyone in the office who might have been able to provide important information. Thus, no significance should be attached to the absence or inclusion of specific individuals from our list of interviewees.

President and Associate Vice President for External Relations), Don Szeszycki (Director of Administration and Planning, Office of the Provost), and Sarah Gardial (Dean, Tippie College of Business). Both sets of interviews were aided by our review of F&O's self-study materials.

1. Positive Attributes

Overall, F&O performs its finance services well. The staff members we spoke to appear well-intentioned and committed to advancing the university's best interests. F&O's senior leadership team is stable and possesses longstanding institutional knowledge. Its members are positive ambassadors for the university. They represent the institution capably and intelligently when interacting with students and faculty, state and local government leaders, the Board of Regents, alumni, and the public at large.

Many of our interviews focused on the university's new modified resource-centered budget model ("new budget model"). F&O's leaders are clearly optimistic and enthusiastic about the new model. They believe it will facilitate better strategic planning and greater financial transparency at the university. To that end, they expect to initiate the development of a new university-wide electronic budget management tool in early 2019. Colleges and departments currently rely on varied and idiosyncratic budgeting tools—a dynamic that leads to inefficiencies and a lack of standardized metrics. The new tool is expected to mitigate these concerns by allowing for more consistency in financial reporting across campus. Individual colleges/units will be required to submit certain financial information so that the system will allow for global budget tracking throughout all facets of university activity.

F&O interacts with virtually every component of the university, and interviewees from other campus units report that the office provides timely responses to inquiries and makes available the data necessary for good financial decision-making. F&O was particularly praised for keeping the President's Office well-informed during events that produce financial strain or logistical complexity (e.g., severe weather, flooding, construction projects, public safety threats, public demonstrations, and major academic and social events). There also appears to be good rapport and communication between F&O, the Provost's Office, and the collegiate deans.

Furthermore, F&O leaders are not remaining idle in response to the serious financial pressures facing the university. They are committed to finding new sources of budget efficiency, cost-savings innovations, and opportunities for financial growth. For example, even though F&O is not meant to be a proactive source of new revenue under the new budget model—that obligation falls to the colleges—its leaders are nonetheless exploring ways to build profits by monetizing proprietary software and management programs for use by third parties.

2. Opportunities for Improvement

Despite the many positives that we identified in the execution of F&O's finance mission, there is room for improvement. The most immediate area where the committee recommends change relates to communication. Outside of the President's Cabinet and the Council of Deans, there continues to be widespread confusion among faculty, staff, and students about the structure and mechanics of the new budget model. This represents a significant missed opportunity. Nearly every person interviewed by the committee stated that the new budget model was implemented too quickly and without adequate explanation. To the extent that information has been shared with campus stakeholders, it is often described as ambiguous or incomplete. Interviewees report hearing mixed-messages about the model's impact and operations depending on who they speak to from F&O, the Provost's Office, and the President's Office. Even within F&O, many believe that the new model is not being explained well. Some feel that the office's initial target audience of deans and collegiate budget officers was far too narrow. Other university constituents worry that the failure to adequately educate faculty about the model will create unhealthy silo effects and hinder interdisciplinary work across colleges as individuals attempt to protect the revenues originating from their academic "turf."

Recommendation: The committee recommends that F&O *reformulate its approach to communicating budget and financial information to the rest of campus*. A specific suggestion is for F&O to *consider crafting a short video for the internal campus community that explains the new budget model* in clear terms and provides examples of how it will operate in specific scenarios. This effort could be based on the existing explanatory budget video created by External Relations for use on the main university website.⁶ A similar idea is for F&O *to establish a regular series of open forums (or "financial academies") on the topic of university finance*. These programs operate at several of our peer institutions, and, when done well, they enable faculty, staff, and students to gain a better understanding of the unique financial and budgetary issues that arise in the university setting. The programs can also bolster the financial acumen of faculty and staff members who wish to become deans or administrators in the future but currently lack opportunities to gain significant budgetary experience.

An additional note about the new budget model involves the role of the collegiate budget officers. The committee observes that college budget officers do not have a direct or dotted reporting line with anyone in F&O. Instead, the officers report to the deans of their colleges. From the perspective of dean autonomy and responsibility, this arrangement seems reasonable. Deans are the ones charged with generating revenue under the new budget model, and they presumably need to maintain control over the collegiate budget personnel responsible for helping them execute

⁶ *The University of Iowa Budget, Explained*, <https://www.youtube.com/embed/DUVRzIfRC9g> (last visited January 24, 2019).

their financial strategies. However, some committee members wondered whether the current reporting structure might create communication challenges between F&O and the colleges in the absence of a dotted reporting line relationship between central administration and the individual collegiate budget officers. Accordingly, while the committee does not recommend making any changes to the reporting structure at present, we feel that forming an ad hoc task force to engage in a deeper study of the issue may be appropriate.

Recommendation: The committee recommends *convening an ad hoc task force that includes representation from the Council of Deans, F&O, the Provost's Office, and the President's Office to review the reporting structure for collegiate budget officers.*

The committee's final finance recommendation is to consider the creation of a university Office of Institutional Research and Data. Admittedly, a full consideration of this proposal would require a discussion with stakeholders about issues outside of the scope of this report. However, we mention it here because our interviews made clear that there is no straightforward way for colleges to collect university-wide financial information. A college hoping to find current or historical budget information must gather numerous reports from different offices within the central administration. Moreover, interviewees note that the reports they receive often show conflicting results or figures despite purporting to contain the same information. The budget management program that F&O expects to launch this year will, we hope, help the university maintain consistent financial data across campus, but its efficacy will depend on the ability of colleges to make meaningful use of the information it collects. An Office of Institutional Research and Data would go far toward facilitating that important objective.

Recommendation: In order to centralize and standardize the collection and reporting of institutional data, the committee recommends the consideration of a new *university Office of Institutional Research and Data.*

b. Operations

The main areas of campus operations that F&O directs are facilities management, campus planning, design and construction management, utilities and energy management, public safety, printing and mail services, laundry service (for UIHC), and parking and transportation services. The committee spoke to the following F&O personnel who engage with or oversee these functions: Rod Lehnertz (Senior Vice President for F&O), Don Guckert (Associate Vice President and Director, Facilities Management), Debby Zumbach (Associate Vice President and Director, Purchasing and Business Services), Lynne Finn (Director of Business and Financial Services, Facilities Management), Scott Beckner (Assistant Vice President and Director, Public Safety), and Sadie Greiner (Director of Design and Construction, Facilities Management).

Further, the committee gained additional awareness of F&O's operational impact on other university constituents by speaking to several individuals outside of the office: Jerry Anthony (Faculty Chair, Campus Planning Charter Committee), Don Szeszycki (Director of Administration and Planning, Office of the Provost), Laura McLeran (Senior Advisor to the President and Associate Vice President for External Relations), and Sarah Gardial (Dean, Tippie College of Business).

1. Positive Attributes

With respect to the role of Facilities Management ("FM"), interviewees were nearly unanimous in their praise for the unit's approach to customer service and work-order management. Colleges and departments enjoy considerable flexibility to plan and adjust their facilities and landscaping budgets in line with specific goals or strategies. Relatedly, FM's formal network of building coordinators is seen as an important and productive resource. The network provides FM with a clear conduit for faculty dialogue so that both sides can discuss each other's needs, limitations, and abilities. For example, the building coordinator network has proven vital in helping FM understand how and when to provide energy services in accord with the unique operational needs of research laboratories that require around-the-clock power to sustain their experiments.

FM also appears to be proactively engaged in its own efficiency review. The unit is working to automate services wherever possible, and it is currently assessing whether some services can be eliminated or outsourced to generate cost-savings without detracting from the university's teaching and research missions. Similarly, FM recently collaborated with other campus units to reassign tasks that could be accomplished faster and more effectively elsewhere (e.g., classroom scheduling, key card access, and compliance with the Americans with Disabilities Act). FM further seems committed to maintaining and ensuring the transfer of legacy knowledge, and the committee was impressed by the unit's emphasis on providing training so that its personnel will be prepared to adapt to changing technology.

Recent innovations by the Department of Public Safety represent another area of operational strength within F&O. These innovations include the SHOUT program, NITE RIDE Express, and Rave Guardian. The SHOUT program—*Students Helping Out*—trains students to serve as security monitors at extracurricular events on campus and in downtown Iowa City. The program came about in response to financial constraints that make hiring and retaining full-time campus police officers an ongoing challenge. Its focus is on community service rather than law enforcement. For example, students working as SHOUT participants assist with bystander intervention, help to locate members of groups who have become separated or lost, arrange for students to find safe transportation home, and provide students with information about other campus safety services.

NITE RIDE Express functions like the popular Uber and Lyft mobile applications by allowing students to make ride requests from their phones or computers. The service costs \$1 per person, provides seating for up to three passengers, and takes passengers directly to their final destination.⁷ Rave Guardian is also a mobile app-based program. It enables users to invite friends, family, or the Department of Public Safety to act as a virtual safety escort, or guardian, when they travel from one location to another on campus. The application also features a panic button that will dial university police directly when activated, as well as a texting option that gives students the ability to transmit safety concerns to the police department anonymously.

2. Opportunities for Improvement

In terms of areas for improvement in operations, one concern relates to shared governance and communication. Specifically, there appears to be a deteriorating working relationship between F&O and the Charter Committees on Campus Planning (“CPC”) and Sustainability.

Despite being one of the primary operations-related charter committees, the assignments that F&O sends to CPC seem mostly trivial (e.g., the layout of campus signage or the decision to remove a single tree). Indeed, over the past three years, the CPC reports that it has rarely been consulted on major building projects or real estate acquisitions. For instance, the CPC was not included in any meaningful discussions relating to the university’s arrangement with a private developer to build and operate the Aspire apartment complex on West Campus, nor was it consulted on any aspect of the university’s decision to purchase—and then later decide to sell—the University Club on Melrose Avenue. The CPC was also unaware until this review process that Lynne Finn will be succeeding Don Guckert as the director of FM. Even though Mr. Guckert attends most CPC meetings and remains the committee’s primary F&O contact, the CPC did not know of Mr. Guckert’s pending retirement, and it has never met with or interacted with Ms. Finn. Similarly, until after the decision was made, the CPC was never told that the Sociology Department is being relocated to Jessup Hall within the next three to four years. The one exception to the trend toward the CPC’s lack of involvement in campus planning involves Hancher Auditorium. The CPC reports that F&O leaders listened to and heeded the committee’s advice on where to locate the new Hancher facility in the wake of the 2008 flood.

Professor committee member Barbara Eckstein serves as co-chair of the Sustainability charter committee. As in the case of the CPC, she, too, reports having never met Ms. Finn prior to the start of this review process. Although Mr. Guckert notified the Sustainability committee that Ms. Finn would be his successor, the committee did not receive an explanation for how the appointment was made, nor one about who was involved in making it. For example, the circumstances suggest

⁷ NITE RIDE *Express* is separate from the standard NITE RIDE program that provides free late-night transportation to students, faculty, and staff.

that no national search was initiated. This contrasts with the hiring of Mr. Guckert, which came after a national search conducted by a committee that included the chair of the CPC. The Sustainability committee further reports that FM did not consult with the Sustainability committee or the CPC about its decision to implement changes to energy management and conservation policies that move the university toward the near-total use of automation in the provision and maintenance of energy services.

In short, while FM was formerly a model of sustainability practices, from changes in energy generation to energy conservation management, and fully imbued with shared governance throughout two charter committees, this appears no longer to be the case.

Recommendation: The committee recommends that *the President consider assigning a senior official in campus administration to each Charter Committee so that a direct line of responsibility and communication can be established.*

Moreover, if the CPC is retained as a functioning campus consultation committee, then F&O should bring projects to its attention early enough in the planning and design process to provide appropriate feedback. The administration should not bring a “baked cake” to the committee for consultation if the input will have no material effect on the proposed project’s development.

A separate communication concern stems from the litigation surrounding the construction of the Stead Family Children’s Hospital (“Children’s Hospital”). Like with the new budget model, interviewees report that there is widespread confusion throughout campus about why the Children’s Hospital project experienced design problems and delays, as well as why an arbitration panel ordered the university to pay \$21.5 million to one of the project’s contractors. Interviewees note that the adverse media attention generated by the arbitration award has led many alumni and legislators to express concerns about whether the university is able to prudently manage construction projects and prevent waste. The committee was pleased to learn that all future UIHC building projects will now be overseen by F&O, rather than solely within UIHC’s administration, which will allow the extensive experience of F&O to benefit the entire campus. F&O’s broader institutional expertise with large construction projects may help mitigate any future challenges, such as those experienced by UIHC during the completion of the Children’s Hospital.

Recommendation: The committee recommends that F&O and the President’s Office consider *clarifying the nature of the challenges that arose in the construction of the Children’s Hospital, how the university responded, and what lessons were learned—and changes made—to ensure that a similar situation does not happen again.* We say this even though F&O did not manage the Children’s Hospital construction project because we believe that F&O is uniquely qualified to address any remaining confusion about it. F&O also appears to be in the best position to outline

the institutional steps necessary to move forward from the project's associated challenges in a positive way.

The committee's final operational comment relates to Public Safety. On one hand, the Department of Public Safety is making impressive headway in finding innovative programming solutions to the problem of static or declining funding. On the other hand, the department's constant need to find budget efficiency raises security risks for the entire campus community.

The biggest issue in this regard is the level of funding for campus police officer salaries. Every local police department—Iowa City, Coralville, and North Liberty—pays its officers more than the University of Iowa. This leads to a consistent turnover rate of at least three campus officers per year. In part because of the higher cost of living in Johnson County compared to other parts of the state, officers often feel compelled to seek positions that offer more competitive compensation packages. The officers also report that the comparably lower salaries at the university leads to decreases in morale and job satisfaction. This dynamic becomes most apparent in situations where campus officers work side-by-side with Iowa City officers, as when the emergency Special Response Team⁸ is activated to address on-campus security crises. Campus officers in these circumstances perform the same tasks at the same time and experience the same risks as their city counterparts—but for far less money.

In large part because of lower compensation and high turnover rates, the Department of Public Safety has effectively become a “feeder department” for other law enforcement agencies across the state. Our interviews suggest that it takes roughly two years on the job for a campus police officer to fully understand her roles and responsibilities. It also costs the university approximately \$100,000 to on-board and train each new police officer that is hired to replace one that leaves. The point at which officers complete their first two years of service is often the time when they are most attractive to other departments. From the latter's perspective, the university is paying to train their officers for them—and the cycle continues year after year.

If campus safety truly is a priority of central administration and the Board of Regents, then something needs to be done to improve the level of resources provided to the Department of Public Safety. The current fiscal allocation to Public Safety means that the university community is unable to attract or retain the most qualified officers. If the department's budget continues to decline, the committee fears that its next source of savings will come from cuts to officer training programs. Staffing a campus police force with less-experienced and less-trained officers is not in the best interests of students, faculty, staff, or campus guests. One possible mitigating option is to consider

⁸ The Special Response Team (SRT) is a joint-effort between the University of Iowa Police Department and the Iowa City Police Department. SRT team members come from both departments. The SRT is activated on campus approximately 3-4 times each year.

re-allocating some of the university's current expenditures for public safety. Specifically, our interviews revealed that approximately 33% of all campus police interventions come in response to situations at UIHC facilities. However, UIHC only pays roughly \$190,000 per year to support these public safety efforts. By way of comparison, the University of Wisconsin police department receives \$2.5 million in financial support from its campus health system for performing a similar level of service.

Recommendation: The committee recommends *the development of a funding and compensation strategy capable of improving the retention and satisfaction of university police officers*. Considering novel funding strategies in this department is especially warranted given the importance of public safety to achieving the university's mission. Ideally, addressing this recommendation will be part of a larger initiative to mitigate the resource constraints faced when seeking to attract and retain talented employees.

c. Decision-Making and Organization

In addition to interview findings that relate mainly to either Finance or Operations, the committee offers the following observations about decision-making and organization that apply more broadly.

First, it appears that mechanisms for shared governance as they relate to F&O and other central administrative units are changing in response to the implementation of the new budget model. Specifically, and noticeable in part from the diminishing role of the CPC, the committee understands that the role of shared governance in university financial planning is now expected to center on the activities of the Budget Review Board ("BRB") and the Central Shared Services Advisory Committees ("CSSACs"). The BRB consists of approximately 30 university leaders, including all collegiate deans and presidential cabinet members, and meets quarterly to hear, assess, and vote on budgeting proposals and appropriations requests from the CSSACs. There are six CSSACS assigned to shared academic service functions: Central Administration, Facilities Management, Information Technology Services, Provost Office, Student Life, and the Research Office. The CSSACs are each co-chaired by collegiate deans, and their membership comes from representatives from university governance councils (i.e., faculty and staff councils), collegiate budget officers, and functional experts from central administration. The CSSACs range in size from eight to fourteen members. Each CSSAC meets several times per semester to discuss potential BRB proposals. For example, the CSSAC for Information Technology Services could decide to request additional funding for improved data security systems. Whether that request is approved will depend on the vote of the BRB.

Recommendation: The committee is not prepared to opine on the wisdom of the new BRB-CSSAC framework, nor to opine on whether this is the best way to exercise fiscal oversight, but *we encourage the campus community to remain vigilant in monitoring the impact of this process on the university's strong tradition of shared governance.* This is an area of university governance that will require deeper and continuous study before any full assessment of its merits can be developed.

Second, we note that F&O does not have a strategic plan. Some individual units have created their own strategic plans, but there is no plan that applies centrally to F&O overall.

Recommendation: The committee *suggests that F&O develop a formal strategic plan.* This plan could be helpful in resolving some of the communications issues discussed above, as well as provide clearer guidance for succession planning in the event of personnel or structural changes. In support of this effort, F&O should *establish clear performance metrics and benchmarks* to guide the plan that the office adopts, as well as to facilitate a process of continuous self-assessment and improvement.

Third, it seems clear that F&O's senior leadership team operates informally and depends on continued good will for success.

Recommendation: We encourage F&O's senior leaders to *consider formalizing their decision-making processes* so that changes in personnel, personal relationships, or organization will not create problems with knowledge transfer, oversight, accountability, and transparency as the office goes forward.

Finally, the committee observes that F&O is a sprawling organization with wide-ranging and diverse responsibilities. This dynamic complicates the ability to manage and conduct an in-depth review of the many unique variables within the office.

Recommendation: The committee recommends *the formation of an ad hoc committee comprised of senior leadership and the President to consider whether F&O should remain as one office or be divided into two or three units.* Regardless of that determination, for future academic reviews of F&O responsibilities, we recommend *dividing the review process into separate committees and stages for each major division within the office: Finance, Operations, and ITS.* This separation would make the review process more manageable, and it would allow the review committees to focus greater attention on more specific issues across the F&O spectrum.

III. Survey Results and Written Feedback

a. Summary of Quantitative Survey Results

The committee is grateful to everyone who participated in the review surveys. Survey #1 went to all faculty with appointments of at least 0.50 FTE (tenured, tenure-track, clinical, research, instructional, adjunct). Approximately 500 of the 2,946 survey recipients completed it (a 17% response).

Ratings on the survey were generally favorable. On the question of satisfaction with University Shared Services for travel requests and expense reimbursements, 71% of respondents are satisfied or very satisfied, and 19% are dissatisfied or very dissatisfied. With respect to campus recycling operations, 75% are satisfied or very satisfied, and 14% are not. High percentages of respondents also report satisfaction with campus snow and ice removal (80%), as well as with the Department of Public Safety's approach to campus safety and security (67%).

As for satisfaction with campus police, 55% are satisfied or very satisfied, but over 40% stated that they had no basis for evaluation. Similar results appear on the questions of satisfaction with the university's approach to campus planning and its provision of transportation services (e.g., Cambus). For campus planning, 26% of respondents are satisfied, 23% dissatisfied, and 50% had no basis to judge. For transportation, 56% expressed satisfaction, 5% dissatisfaction, and 38% had no basis to evaluate. Printing services is the fourth area where many respondents (52%) did not feel able to make a qualitative assessment. Of those who did, 40% are satisfied.

The highest rates of dissatisfaction relate to building maintenance, custodial services, and parking. With respect to building maintenance and custodial services, 64% are satisfied and 32% dissatisfied. Similar results appear for parking services: 56% satisfied, 35% dissatisfied. Finally, as to parking availability, 42% of respondents are satisfied but 50% are not.

Survey #2 went to approximately 150 university administrators and staff members who were identified as having routine and direct working contact with F&O personnel. We received approximately 37 responses (24%).

Again, responses to this survey were generally favorable. Most respondents (66%) have a favorable view of F&O's leadership. Over 90% of respondents also report having a good understanding of F&O's roles and responsibilities. Similarly, over 80% have a favorable assessment of F&O's effectiveness, as well as a good understanding of F&O's organizational structure. Nearly 75% of respondents indicate that F&O adequately responds to their questions and concerns, and 64% say that their questions and concerns are addressed in a timely manner.

Other results are more mixed. On the question of F&O's effectiveness in explaining the new budget model, 38% of respondents responded positively, 41% negatively, and 22% had no basis to judge. A large percentage (46%) also responded negatively to F&O's effectiveness in communicating the challenges that it faces, and 41% report that F&O is ineffective at communicating its major achievements.

Many respondents (35%) had no basis to evaluate F&O's effectiveness in advocating for the university at the state level, whereas 46% responded positively and 19% were negative. Forty-four percent of respondents agree that F&O considers an appropriate amount of input from other university stakeholders when developing policy, but 30% disagree. Similar results appear on the issue of F&O's understanding of how its actions affect other colleges, units, and departments. Forty-seven percent of respondents agree that F&O does understand its impact in this regard. However, 24% disagree, and 27% had no basis to evaluate.

For a more detailed summary and breakdown of the quantitative survey results, see Appendix F.

b. Summary of Qualitative Survey Feedback

Surveys #1 and #2 gave respondents the option to provide more elaborate written comments to the committee, and many people did so. While the committee recognizes that it is difficult to determine how representative this feedback might be when expressed by individuals initiating the discussion, we nonetheless identified a few recurring themes and comments of note.

With respect to Survey #1, we encourage F&O leaders to review the following items:

- The financial burden that hospital parking rates place on low-income families; threats to tow or ticket vehicles belonging to family members who bring patients to the emergency room and/or to admit children/elderly patients;
- Logistical complications that follow from policies requiring physicians and medical staff to find alternative parking on home football game days;
- As a result of university funding cuts, there are reported inconsistencies in the quality of custodial services and deferred maintenance operations provided to different campus buildings (i.e., some buildings receive better service than others);

- Insufficient services provided by custodians (e.g., no longer emptying office trash, no longer vacuuming or dusting offices); prevalent pests and mold in older facilities;
- Higher fees charged by campus printing services in comparison to private vendors; requirements to use campus printing when lower costs can be obtained elsewhere;
- Limited recycling options for glass; no composting options;
- Uncomfortable heating and cooling fluctuations.

Comments in Survey #2 suggest a need for F&O to consider looking into the following issues:

- Lack of available metrics linked to student success (e.g., F&O operating costs per student; collegiate operating costs and trends per student);
- Limited ability to provide direct feedback to individual units and divisions within F&O; requests for more ways to share input on customer service;
- Changing staff roles and adding new policies—like the new budget model—without providing the resources, skills, and training necessary for success;
- Insufficient training for finance staff.

The feedback from Survey #2 also indicates, as should be expected, that people experience F&O one unit at a time and have different experiences with different units.

IV. Recommendations

In closing, the committee finds that the Office of the Senior Vice President for Finance and Operations performs many of its responsibilities well. We offer the following summary and restatement of our recommendations, grouped as per their primary area, in the hope of making a solid office even more effective:

Communication

- Revise the manner, method, and content of F&O's communications to campus stakeholders on matters relating to finance and the university's budget model, including, but not limited to:

- Creating a short video for the internal campus community that explains the university's new budget model;
 - Establishing a "Financial Academy" program for faculty and staff members hoping to improve their understanding of the university's financial operations and budget model.
- Consider formally communicating the challenges that arose and the lessons learned from the construction of the Children's Hospital.

Structure and Reporting Relationships

- Convene an ad hoc committee comprised of senior leadership and the President to consider whether F&O should remain as one office or be divided into two or three units; for future academic reviews of F&O responsibilities, divide the review process into separate committees and stages for each major division within the office: Finance, Operations, and ITS.
- Review the roles of the charter committees on Campus Planning and Sustainability to determine how they can be structured or reframed to advise campus leadership more effectively and bolster shared governance.
- Convene an ad hoc task force that includes representation from the Council of Deans, F&O, and the President's Office to review the reporting structure for collegiate budget officers.
- Establish a central University Office of Institutional Research and Data to assist with the collection, tracking, and dissemination of university-wide financial information.

Decision Processes and Governance

- Continue to monitor and study the impact that the BRB-CSSAC budgeting process has on shared governance.
- Adopt a formal F&O strategic plan to complement those of individual F&O units; establish clear performance metrics and benchmarks to guide the plan that the office adopts, as well as to facilitate a process of continuous self-assessment and improvement.
- Formalize the decision-making process utilized by senior F&O leadership.

Operational

- Develop strategies that would improve retention and satisfaction of university police officers.
- Explore ways to reduce the financial burdens that UIHC parking rates often impose on patients and their family members.

Appendices

Appendix A.....	Finance and Operations Self-Study
Appendix B.....	Review Committee's Request for Additional Information
Appendix C.....	Interview Schedule
Appendix D.....	Faculty Survey Template
Appendix E.....	Collegiate Staff Survey Template
Appendix F.....	Quantitative Survey Results

Appendix B

Review Committee's Request for Additional Information



COLLEGE OF LAW

464 Boyd Law Building
Iowa City, Iowa 52242-1113
319.335.9883
joseph-yockey@uiowa.edu

19 September 2018

Mr. Rod Lehnertz
Senior Vice President for Finance and Operations and University Architect
University of Iowa

Re: Request for additional information for faculty review of F&O operations

Dear Rod:

Thank you for the self-study of the various units of the Finance and Operations office (F&O). The self-study has proven very helpful as we think about the nature and scope of our review.

While the report provides considerable background, we do, however, have several clarifying questions that we would like to ask before we begin our own surveying and interviewing. We are keen to produce a review that has value for F&O and for faculty governance, and our questions are offered in a spirit of meaningful collaboration.

One set of questions concerns who among university employees and faculty (F&O's "customers") you included in your self-study, as well as how they were included. Another set of questions concerns what metrics you have available to bring greater specificity to the claims in the self-study and accompanying documents. A third set asks for details about the allocation of funds within F&O, as well as the office's efforts to contain costs and improve efficiency. A final set of questions deals with F&O units' roles and responsibilities in response to major challenges since the last review. The flood of 2008, for good reason, gets special mention in the self-study, but other challenges, such as the change in the budget model, do not. The paragraphs below describe our thought process, and the appendix lists specific items for your consideration.

First, regarding the self-study report, did the various units that created it seek the input of both rank-and-file employees and management employees (e.g., through surveys or interviews)? Did they, for example, use data from Working at Iowa or some other mechanism? Similarly, do the various units whose work explicitly affects faculty (and students) regularly, or even irregularly, seek from those constituencies their perception of the units' work? Perhaps there have been questionnaires or surveys or other forms of input sought from appropriate charter committees. Our work would be simplified and enhanced if you could provide us answers to these questions and any relevant metrics.

Next, your self-study indicates a perception of a “fat middle” that runs counter to the actual efficiency and funding of operations. Because the allocation of funds within the University is of direct concern to faculty, we would like greater insight into the process of setting budgets for F&O and its units, as well as how the units have coped with the seemingly inevitable budget reversions and overruns across the campus and within F&O. Specifically, it would be helpful for the committee to see how actual expenditures compare to the original budgets for each unit for at least the past two fiscal years. It also would help to obtain details regarding measures of activity volume and some indication of how operational efficiency has (or has not) improved over time.

Similarly, we know the valiant effort that you and F&O have devoted to flood recovery. Any available specific information about this continuing effort in the last decade would help us appropriately evaluate the balance of those challenging responsibilities with the ongoing functions of the institution. In addition, information about the management of other major challenges would help us produce a review with real use value. Current major changes like the significant cuts in state funding and the change in the budgeting model, and on-going challenges like the relationship between UIHC and UI, are, we suspect, integral to the work of some of your units—but the self-study is largely silent on the specific details surrounding such major challenges.

In seeking these clarifications, we hope that we can agree on a reasonable and convenient response that provides us with additional detail in a defined amount of time. For example, it would be most helpful if you could respond to our questions by October 19, but please let me know what you believe is doable. We hope to begin surveying in October and to begin interviewing in November. These aren’t immovable deadlines, but they are serious aspirations. I’m happy to talk about possible ways to make this project more manageable.

In closing, we look forward to speaking with you and your colleagues in F&O as the review goes forward. We know we will learn a great deal, and we hope that our review will make F&O, the University, and the faculty stronger as a result of our interaction and dialogue.

Sincerely,

/s/ JWY

Joseph W. Yockey
Professor of Law
Chair, Senate Review Committee of F&O

cc: Ramji Balakrishnan
Brian Burnett
Barbara Eckstein
Megan Foley Nicpon
Alicia Gerke
Lia Plakans
Laura Zaper

Survey and other inputs

1. Employee input
 - a. A description, along with applicable data, relating to any surveys (e.g., Working at Iowa) or other methods of obtaining data from your employees regarding the self-study or the functioning of F&O units.
2. Customer input
 - a. A description, along with applicable data, relating to any surveys or other methods of obtaining data from your “customers” (employees and faculty) regarding services that you provide.

Budgeting within the F&O office

1. Setting and monitoring budgets
 - b. Is the office appropriately resourced? Are all budgeted funds always spent?
 - c. What is the process for setting budgets? For instance, what is the review process for budget requests made by and allocations made to F&O?
 - d. How has the F&O budget changed during the past five years? It would be helpful to have data on budgets and actuals, along with measures of activity volume.
 - e. What is the control over expenses? How do you deal with budget overruns?
 - f. How have the budgeted allocations to individual units changed over time? Again, it would be useful to have budget and actual cost data along with measures of activity volume, by unit, for the prior five years.
 - g. What kinds of actions are taken for budget overruns?
 - h. Please describe the change in staffing over the past five years. Here, it would be helpful to have a table of staffing levels, over time, with a note that provides the reasoning for major changes, if any.
2. Evaluating Initiatives
 - i. What is the process for evaluating capital investments? What is the process for prioritizing among competing initiatives?
 - j. How do you evaluate the need for staff additions?
 - k. What is the mechanism for prioritizing and evaluating discretionary programs?

Measures of Activity Volume

1. Aggregate F&O operations
 - a. What are appropriate measures of activity? In other words, how is performance evaluated for F&O at the aggregate level? What are the relevant benchmarks (e.g., values for other schools)? It would be good to have data regarding targets, actuals, and benchmarks.
 - b. What is the process for (internal) strategic review? When was the last review? Who are the persons who participate in any such review?
 - c. Is there a periodic review of services to evaluate what services to insource versus outsource? Please provide specific examples as required.
2. Evaluation of Units within F&O
 - d. What are the key performance indicators (KPIs) for each F&O unit? Again, it would be helpful to have time-series data regarding targets and actuals for the review period. If possible, we would appreciate the categorization of KPIs into measures that face outward (e.g., customer satisfaction) and inward (e.g., number of transactions per employee).
 - e. In addition to the above KPIs, please describe and summarize any other ad-hoc (internal) customer-related data that you collect (e.g., via surveys). Likewise, please describe and provide data on measures of process efficiency.
 - f. Finally, so that we understand how your office evaluates sub-units, it would be helpful to obtain further clarity into how you set KPI targets and the process for monitoring/re-evaluating KPIs.
3. Evaluation within individual units of the F&O
 - g. To the extent possible, it would be helpful to obtain performance data for sub-units within larger units (e.g., reviews of purchasing within shared services).

Effects of major environment / process changes

1. Budget process
 - a. Please provide a description of the budget model. That is, what is the model that determines the allocation of the GEF among colleges for F&O related matters?
 - b. Please comment on how the current iteration of the budget model was developed. Please comment on any impact in the F&O office as the model evolved over the past five years. What challenges do you anticipate going forward?

- c. How are F&O costs allocated to units? How were the allocation bases determined? What role do “customer” inputs play in this selection?
- 2. Budget implementation
 - a. How are budget priorities communicated to units throughout campus (e.g., colleges)?
 - b. What is the frequency of budget-actual comparisons provided to units?
 - c. What is the process for adjusting for variances / reversions?
 - d. What is the role of units (e.g. colleges) in configuring the response to budget shortfalls / reversions and other exigencies?
- 3. Other major changes
 - a. Flood recovery and management
 - b. Other changes, if any.

Appendix C

Interview Schedule

<i>Review of Office of Vice President for Finance and Operations</i>	
<i>Monday, December 3 (B5 Jessup)¹</i>	
9:15 am - 10:00 am	Lynne Finn & Don Guckert (Facilities Management – Business & Financial Services) <ul style="list-style-type: none"> • Joe Yockey • Ramji Balakrishnan • <i>Alicia Gerke***</i> • Brian Burnett
10:00 am – 10:45 am	Peter Matthes (Senior Advisor to the President and Vice President for External Relations) <ul style="list-style-type: none"> • Joe Yockey • <i>Ramji Balakrishnan***</i> • Alicia Gerke • Brian Burnett
11:00 am – 11:45 am	Rod Lehnertz (Senior Vice President for Finance & Operations) <ul style="list-style-type: none"> • <i>Joe Yockey***</i> • Ramji Balakrishnan • Alicia Gerke • Brian Burnett
11:45 am – 1:00 pm	Review Committee Members take Brian to lunch
1:00 pm – 1:45 pm	Jerry Anthony (Faculty Chair, Campus Planning Charter Committee) <ul style="list-style-type: none"> • Joe Yockey • Megan Foley Nicpon • Barbara Eckstein • <i>Brian Burnett***</i>

¹Names in italics and designated with *** are the assigned note-takers for each interview.

2:00 pm – 2:45 pm	Debby Zumbach (Director of Purchasing) <ul style="list-style-type: none"> • Joe Yockey • <i>Barbara Eckstein***</i> • Brian Burnett
3:00 pm – 3:45 pm <i>NOTE ROOM CHANGE TO 105 JESSUP</i>	Susan Klatt (Director of Financial Management & Budget) <ul style="list-style-type: none"> • <i>Joe Yockey***</i> • Megan Foley Nicpon • Ramji Balakrishnan • Brian Burnett
Evening	Brian Burnett to have dinner with Rod Lehnertz
<i>Tuesday, December 4 (B5 Jessup)</i>	
9:00 am – 9:45 am	Scott Beckner (Director of Public Safety) <ul style="list-style-type: none"> • Joe Yockey • Megan Foley Nicpon • Lia Plakans • <i>Alicia Gerke***</i> • Brian Burnett
10:00 am – 10:45 am	Ted Yanecek (Assistant to Senior Vice President Lehnertz) <ul style="list-style-type: none"> • Joe Yockey • Megan Foley Nicpon • <i>Lia Plakans***</i> • Brian Burnett
11:00 am – 11:45 am	Laura McLeran (Senior Advisor to President, Associate Vice President for External Relations) <ul style="list-style-type: none"> • Joe Yockey • <i>Megan Foley Nicpon***</i> • Barbara Eckstein • Brian Burnett

11:45 am – 1:00 pm	Review Committee Members take Brian to lunch
1:00 pm – 1:45 pm	Don Szeszycki (Provost Office – Director of Administration and Planning) <ul style="list-style-type: none"> • Barbara Eckstein • <i>Ramji Balakrishnan***</i> • Brian Burnett
2:00 pm – 2:45 pm	Cathy Hagen (Financial Management & Budget – Director, Budget Development) <ul style="list-style-type: none"> • Megan Foley Nicpon • <i>Barbara Eckstein***</i> • Ramji Balakrishnan • Brian Burnett
3:00 pm – 3:45 pm	Sadie Greiner (Facilities Management – Director of Design & Construction) <ul style="list-style-type: none"> • <i>Megan Foley Nicpon***</i> • Barbara Eckstein • Ramji Balakrishnan • Brian Burnett
<i>Wednesday, December 5 (105 Jessup)</i>	
1:00 pm – 2:30 pm	Terry Johnson & Cynthia Bartels (Chief Financial Officer; Director of Treasury Operations) <ul style="list-style-type: none"> • Megan Foley Nicpon • <i>Lia Plakans***</i> • Barbara Eckstein • Ramji Balakrishnan • Alicia Gerke

<i>Thursday, December 6 (B5 Jessup)</i>	
3:00 pm – 3:45 pm	Sarah Gardial (Dean, Tippie College of Business) <ul style="list-style-type: none"> • Joe Yockey • Lia Plakans • Barbara Eckstein • <i>Ramji Balakrishnan***</i>
5:30 pm – 7:00 pm	Review Committee Interview De-brief (2520B UCC) <i>Brian to join by phone</i>

Appendix D

Faculty Survey Template

F&O REVIEW COMMITTEE 2018-19
SURVEY OF FACULTY (DECEMBER, 2018)

Survey #1: General Faculty Audience

Targeted respondent group: All faculty with at least 0.50 FTE (tenured, tenure-track, clinical, research, instructional, adjunct).

Working with HR, we will also request respondent demographic information (e.g., sex, faculty status, Collegiate home)

We will ask respondents to identify their length of employment status as one of the following:

- 0-2 years
- 3-6 years
- 7-10 years
- 11-15 years
- More than 15 years

Welcome/Intro email:

Dear Colleagues:

The Faculty Senate is charged with reviewing each of the University's central academic offices and officials at least once every seven years. These reviews are conducted in collaboration with the Office of the President and are an important part of shared governance on our campus.

This year, President Bruce Harreld and Faculty Senate President Russ Ganim established a committee to review all of the [Office of Finance and Operations \(F&O\)](#), including the departments of Treasury Operations, Facilities Management, Purchasing and Business Services, and Public Safety.

On behalf of the committee that is tasked with conducting this holistic review, I'm writing to seek your feedback. Kindly complete our survey. Help us best assess the strengths of programs and where the University might do better.

The value of our review depends on a large number of responses to our surveys and interviews.

Thank you for your assistance.

*Joseph Yockey, Faculty Senate Secretary & Review Committee Chair
Brian Burnett, Senior Vice President, Finance & Operations, University of Minnesota
Ramji Balakrishnan, Tippie College of Business
Barbara Eckstein, College of Liberal Arts & Sciences
Megan Foley Nicpon, College of Education
Alicia Gerke, Carver College of Medicine
Lia Plakans, College of Education*

Performance Evaluation

	Very satisfied	Satisfied	No Basis to Evaluate	Dissatisfied	Very Dissatisfied
How satisfied are you with University Shared Services (for travel requests and travel expense reimbursements)					
How satisfied are you with campus building maintenance & custodial services?					
How satisfied are you with campus recycling operations?					
How satisfied are you with the university's performance in snow/ice removal?					
How satisfied are you with the performance of the Department of Public Safety on matters relating to campus safety and security?					
Overall, how satisfied are you with the performance of the University of Iowa Police?					
How satisfied are you with university parking services?					

How satisfied are you with the availability of parking on campus?					
How satisfied are you with university transportation services (e.g., Cambus)					
How satisfied are you with the university's printing services?					
How satisfied are you with the university's approach to campus planning?					

Narrative Response Questions

- 1) Do you have any additional comments for the review committee? For example, please feel free to explain the reasons for some or all of your survey responses.
- 2) What do you appreciate most from F&O on the University of Iowa campus?
- 3) What do you wish F&O would concentrate more on or improve to support the mission of the University of Iowa?

To provide additional feedback to the review committee, please write to Laura Zaper at laura-zaper@uiowa.edu

[End of Survey #1]

Appendix E

Collegiate Staff Survey Template

Survey #2 – Targeted University Audiences

Targeted respondent group: Collegiate Assistant Deans for Finance & Administration; Collegiate Accounting Managers; Collegiate Facilities Directors.

Working with HR, we will request respondent demographic information (e.g., sex, collegiate home).

We will ask respondents to identify their length of employment status as one of the following:

- 0-2 years
- 3-6 years
- 7-10 years
- 11-15 years
- More than 15 years

Welcome/Intro email:

Dear Colleagues:

The Faculty Senate is charged with reviewing each of the University's central academic offices and officials at least once every seven years. These reviews are conducted in collaboration with the Office of the President and are an important part of shared governance on our campus.

This year, President Bruce Harreld and Faculty Senate President Russ Ganim established a committee to review all of the [Office of Finance and Operations \(F&O\)](#), including the departments of Treasury Operations, Facilities Management, Purchasing and Business Services, and Public Safety.

On behalf of the committee that is tasked with conducting this holistic review, we are writing to seek your feedback. Kindly complete our survey. Help us best assess the strengths of programs and where the University might do better.

The value of our review depends on a large number of responses to our surveys and interviews.

Thank you for your assistance.

Joseph Yockey, Faculty Senate Secretary & Review Committee Chair

Brian Burnett, Senior Vice President, Finance & Operations, University of Minnesota

Ramji Balakrishnan, Tippie College of Business

Barbara Eckstein, College of Liberal Arts & Sciences

Megan Foley Nicpon, College of Education

Alicia Gerke, Carver College of Medicine

Lia Plakans, College of Education

Understanding the Office of Finance & Operations ("F&O")

	Very well	Somewhat well	Not very well	Not well at all	Not Sure
How well do you feel you understand the roles and responsibilities of F&O?					

	Strongly agree	Agree	No Basis to Evaluate	Disagree	Strongly Disagree
My overall assessment of the leadership of Finance & Operations is favorable.					
My overall assessment of the effectiveness of F&O is favorable.					
I understand the organizational structure of F&O					

	Strongly agree	Agree	No Basis to Evaluate	Disagree	Strongly Disagree
F&O is effective in communicating how its policies and decisions affect faculty					
F&O is effective in explaining the university's budget model					

F&O is effective in communicating the challenges it faces					
F&O is effective in communicating its major achievements					
F&O is effective at advocating for the University of Iowa at the state level					

	Strongly Agree	Agree	No Basis to Evaluate	Disagree	Strongly Disagree
F&O considers an appropriate amount of input from other university stakeholders when developing and/or implementing new initiatives					
F&O adequately responds to questions or concerns					
F&O responds to questions or concerns in a timely manner					
F&O understands how its actions affect my					

college, unit, or department					
---------------------------------	--	--	--	--	--

Narrative Response Questions

- 1) Do you have any additional comments for the review committee? For example, please feel free to explain the reasons for some or all of your survey responses.
- 2) What do you appreciate most from F&O on the University of Iowa campus?
- 3) What do you wish F&O would concentrate more on or improve to support the mission of the University of Iowa?

To provide additional feedback to the review committee, please write to Laura Zaper at laura-zaper@uiowa.edu

[End of Survey #2]

Appendix F

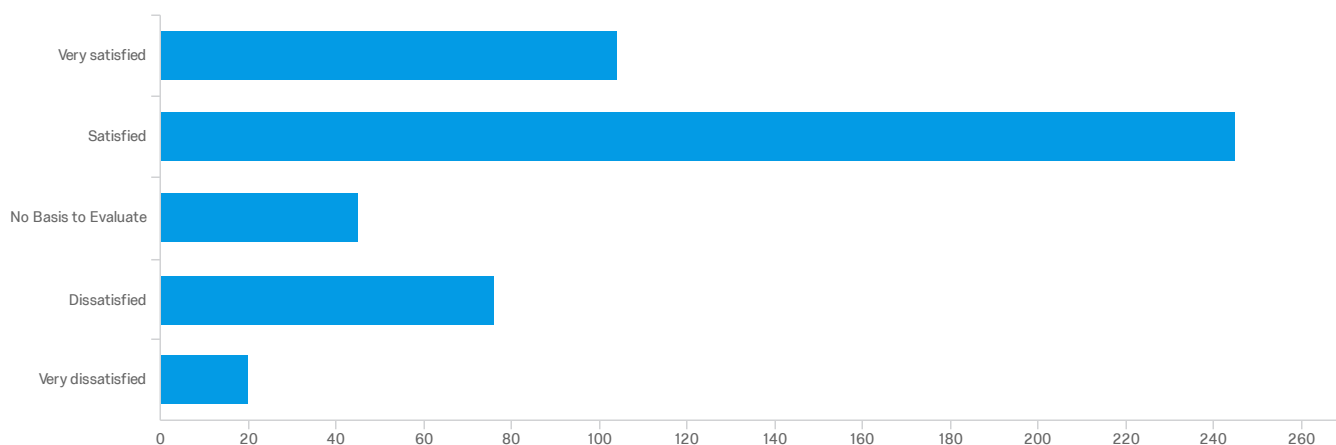
Quantitative Survey Results

Default Report

Faculty Survey of Office of Finance and Operations

December 20, 2018 4:01 PM MST

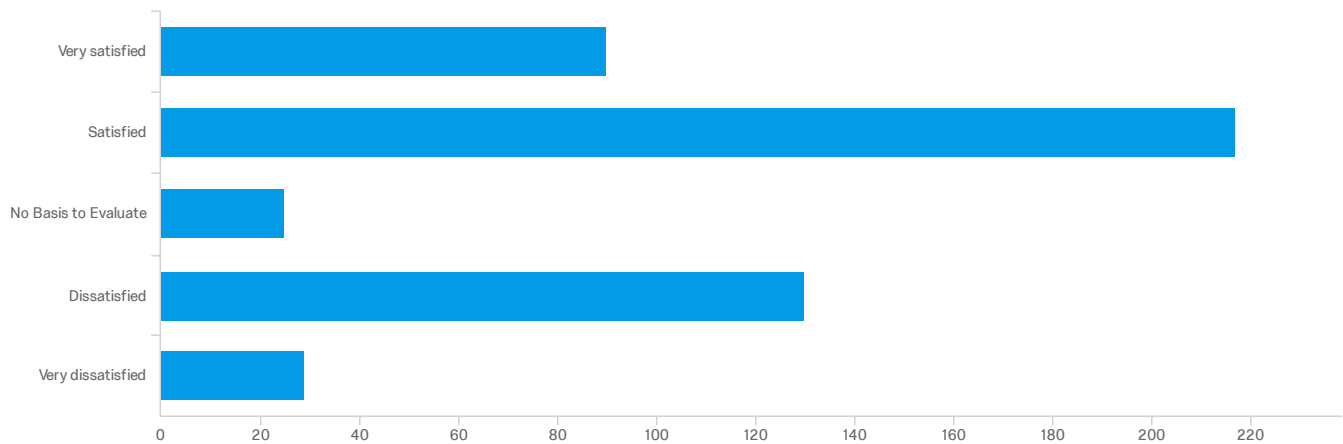
Q1 - How satisfied are you with University Shared Services (for travel requests and travel expense reimbursements)?



#	Field	Choice Count
1	Very satisfied	21.22% 104
2	Satisfied	50.00% 245
3	No Basis to Evaluate	9.18% 45
4	Dissatisfied	15.51% 76
5	Very dissatisfied	4.08% 20
		490

Showing rows 1 - 6 of 6

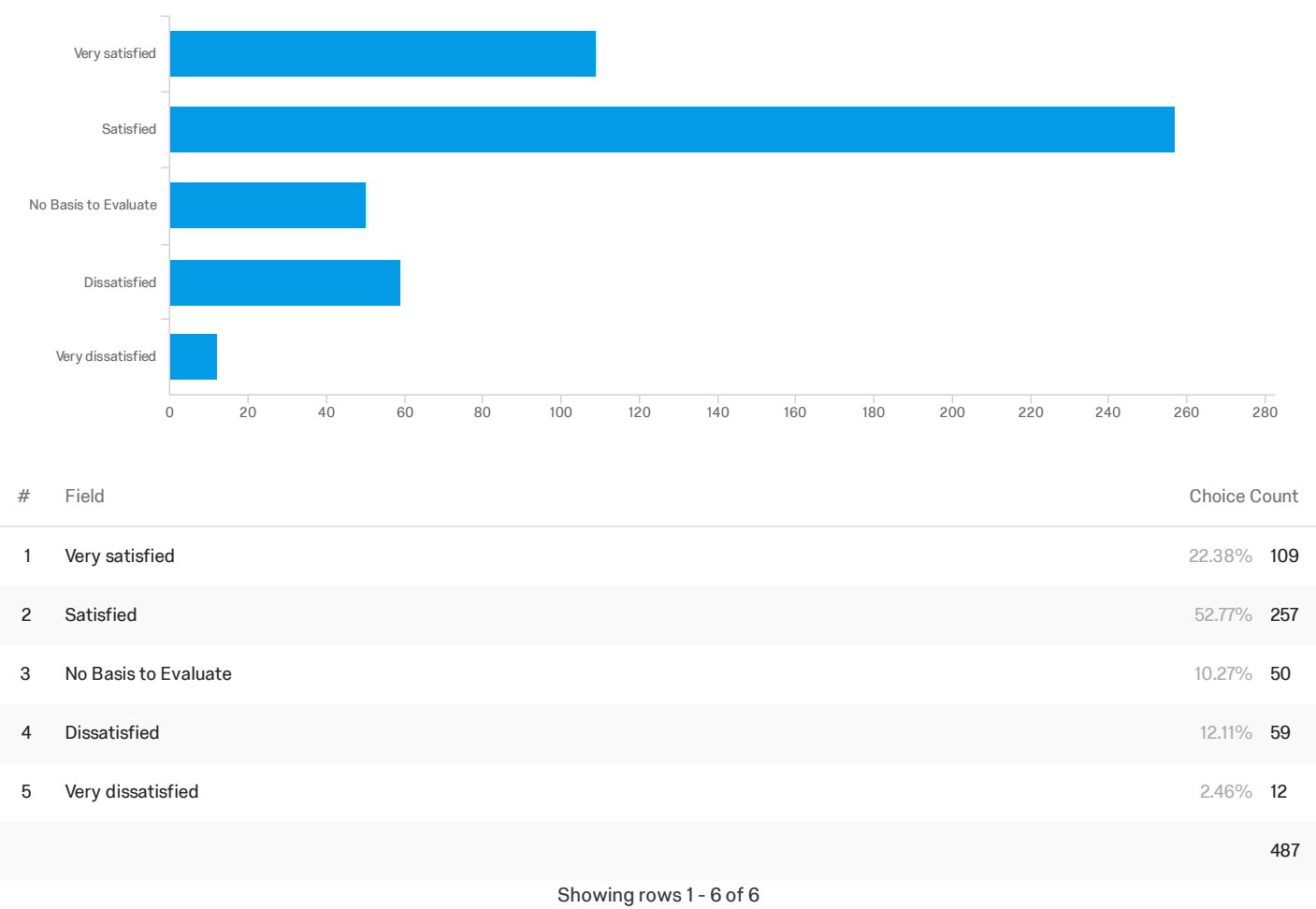
Q2 - How satisfied are you with campus building maintenance & custodial services?



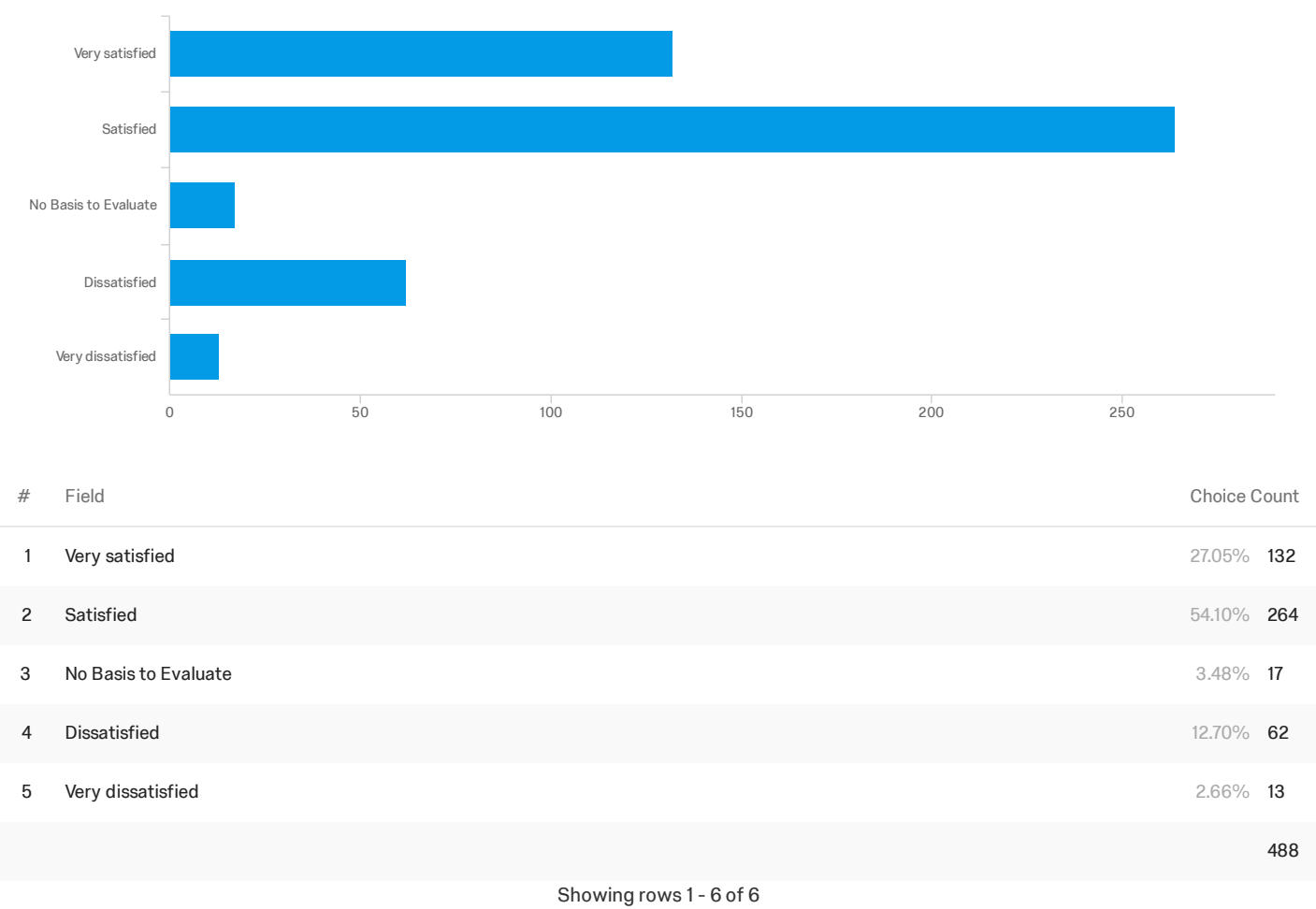
#	Field	Choice Count
1	Very satisfied	18.33% 90
2	Satisfied	44.20% 217
3	No Basis to Evaluate	5.09% 25
4	Dissatisfied	26.48% 130
5	Very dissatisfied	5.91% 29
		491

Showing rows 1 - 6 of 6

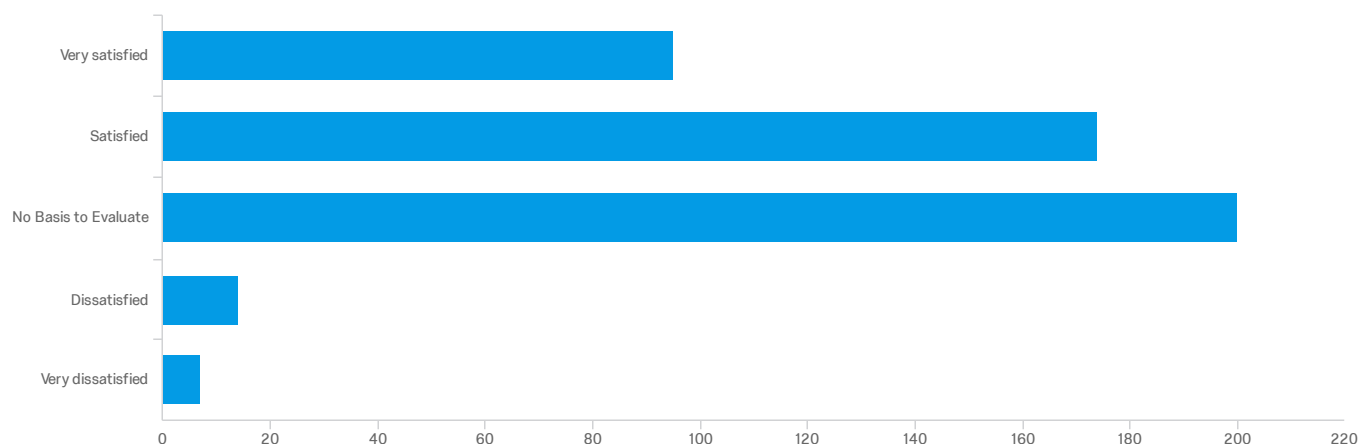
Q3 - How satisfied are you with campus recycling operations?



Q4 - How satisfied are you with the university's performance in snow/ice removal?



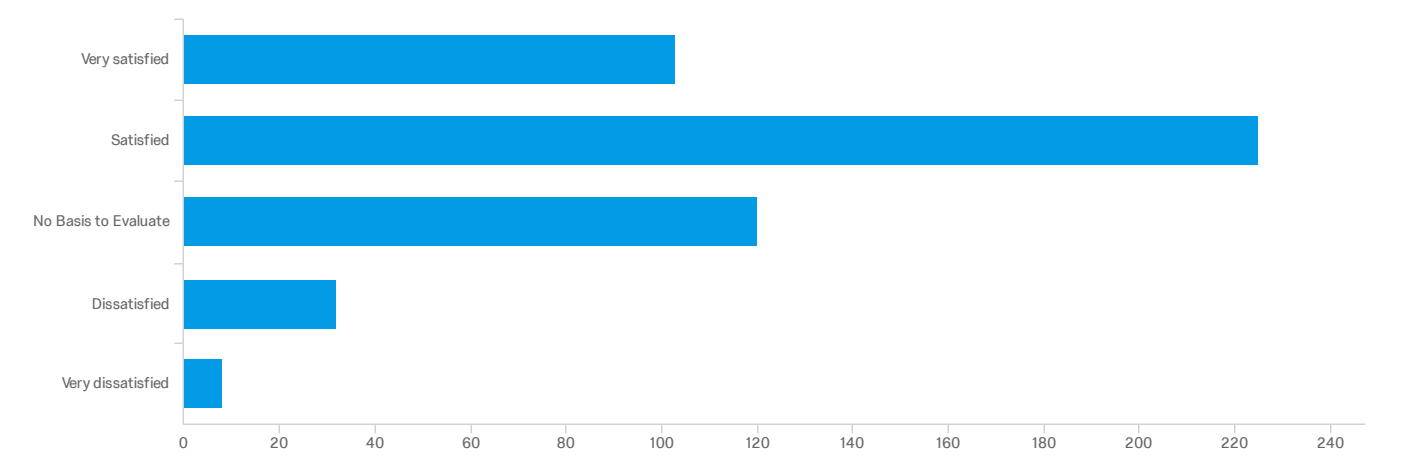
Q6 - Overall, how satisfied are you with the performance of the University of Iowa Police?



#	Field	Choice Count
1	Very satisfied	19.39% 95
2	Satisfied	35.51% 174
3	No Basis to Evaluate	40.82% 200
4	Dissatisfied	2.86% 14
5	Very dissatisfied	1.43% 7
		490

Showing rows 1 - 6 of 6

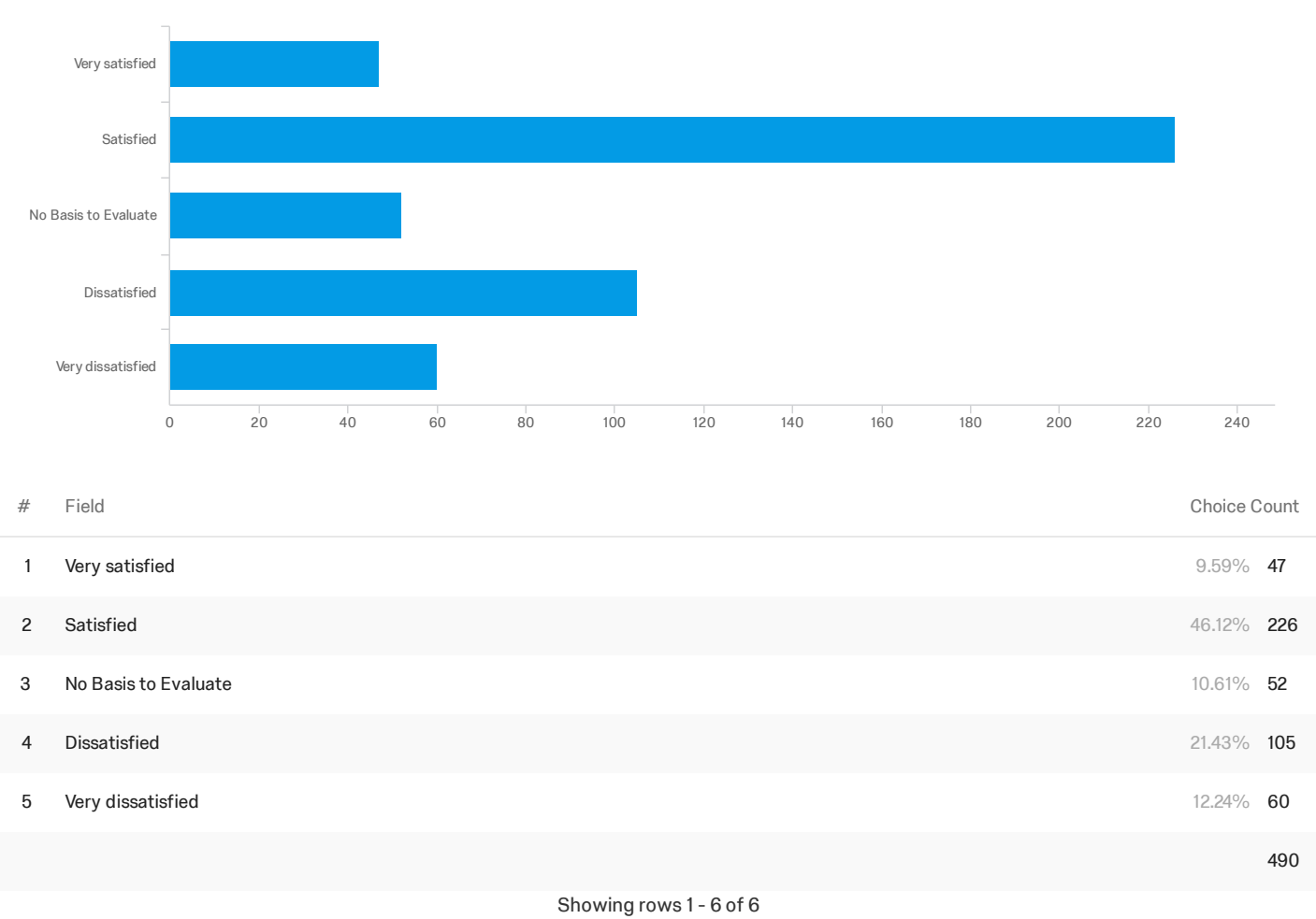
Q5 - How satisfied are you with the performance of the Department of Public Safety on matters relating to campus safety and security?



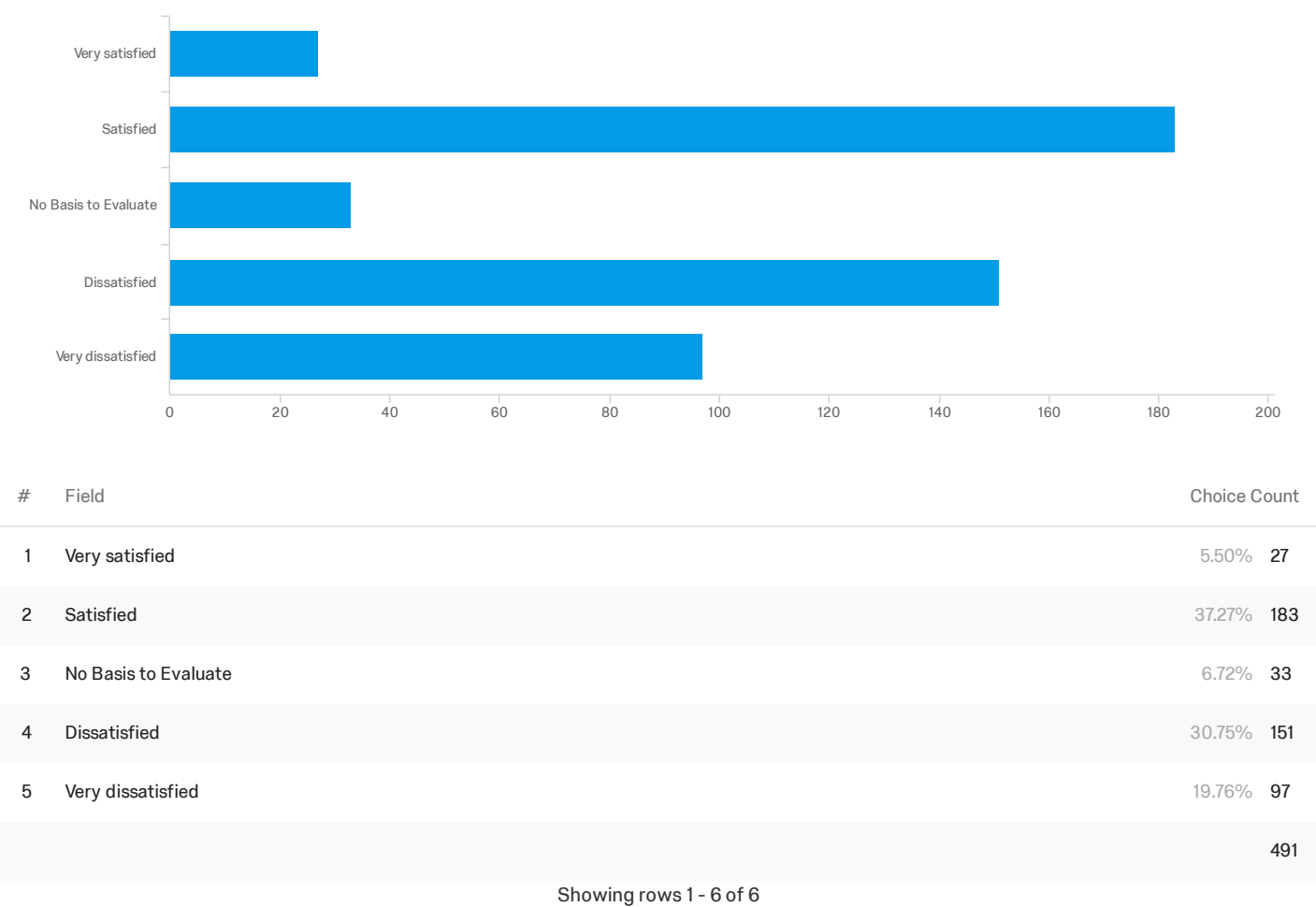
#	Field	Choice Count
1	Very satisfied	21.11% 103
2	Satisfied	46.11% 225
3	No Basis to Evaluate	24.59% 120
4	Dissatisfied	6.56% 32
5	Very dissatisfied	1.64% 8
		488

Showing rows 1 - 6 of 6

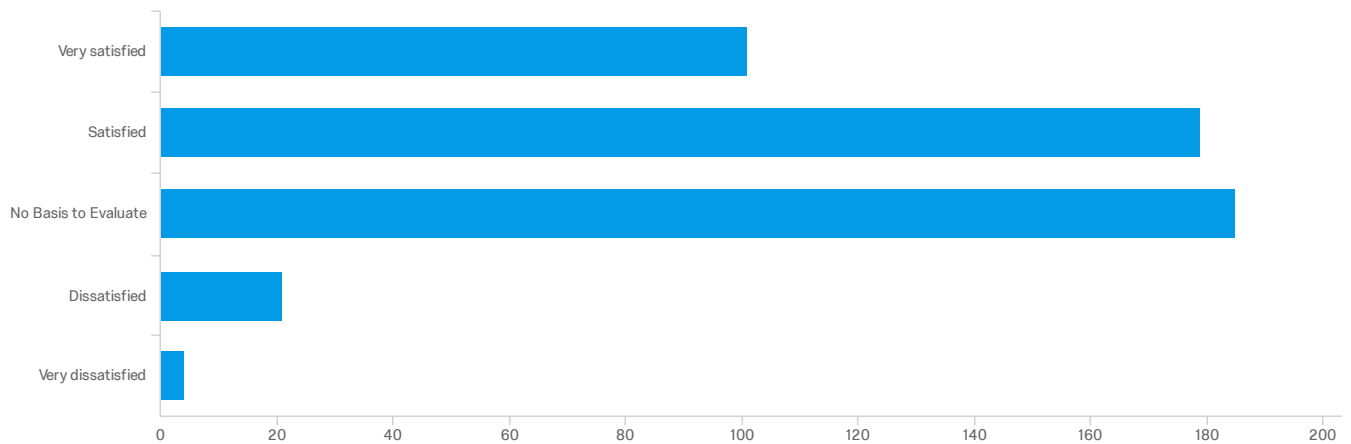
Q7 - How satisfied are you with university parking services?



Q8 - How satisfied are you with the availability of parking on campus?



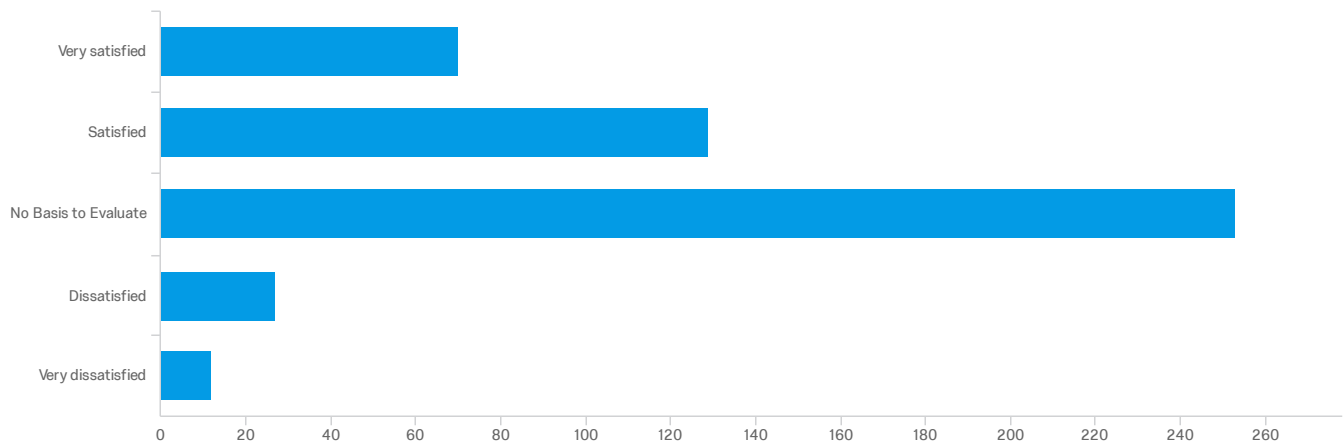
Q9 - How satisfied are you with university transportation services (e.g., Cambus)?



#	Field	Choice Count
1	Very satisfied	20.61% 101
2	Satisfied	36.53% 179
3	No Basis to Evaluate	37.76% 185
4	Dissatisfied	4.29% 21
5	Very dissatisfied	0.82% 4
		490

Showing rows 1 - 6 of 6

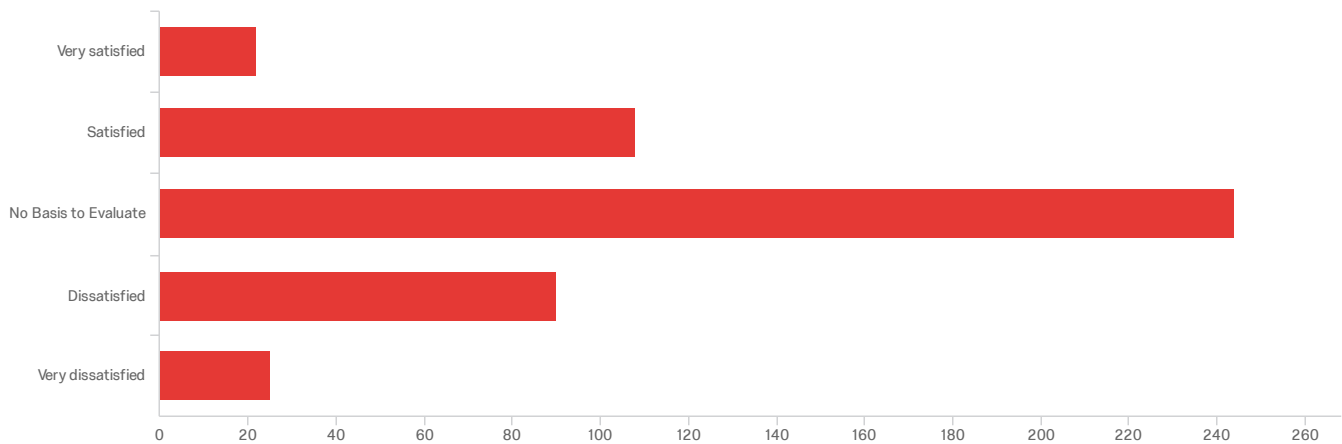
Q10 - How satisfied are you with the university's printing services?



#	Field	Choice Count
1	Very satisfied	14.26% 70
2	Satisfied	26.27% 129
3	No Basis to Evaluate	51.53% 253
4	Dissatisfied	5.50% 27
5	Very dissatisfied	2.44% 12
		491

Showing rows 1 - 6 of 6

Q13 - How satisfied are you with the university's approach to campus planning?



#	Field	Minimum	Maximum	Mean	Std Deviation	Variance	Count
1	How satisfied are you with the university's approach to campus planning?	1.00	5.00	2.98	0.89	0.79	489

#	Field	Choice Count
1	Very satisfied	4.50% 22
2	Satisfied	22.09% 108
3	No Basis to Evaluate	49.90% 244
4	Dissatisfied	18.40% 90
5	Very dissatisfied	5.11% 25
		489

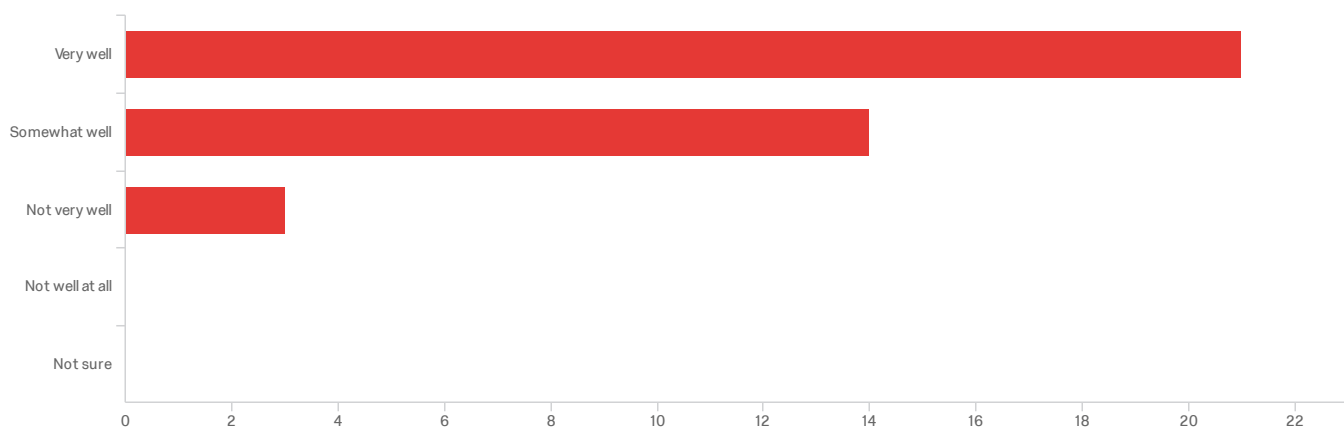
Showing rows 1 - 6 of 6

Default Report

Survey of Office of Finance and Operations

December 26, 2018 1:39 PM MST

Q1 - How well do you feel you understand the roles and responsibilities of Finance & Operations?

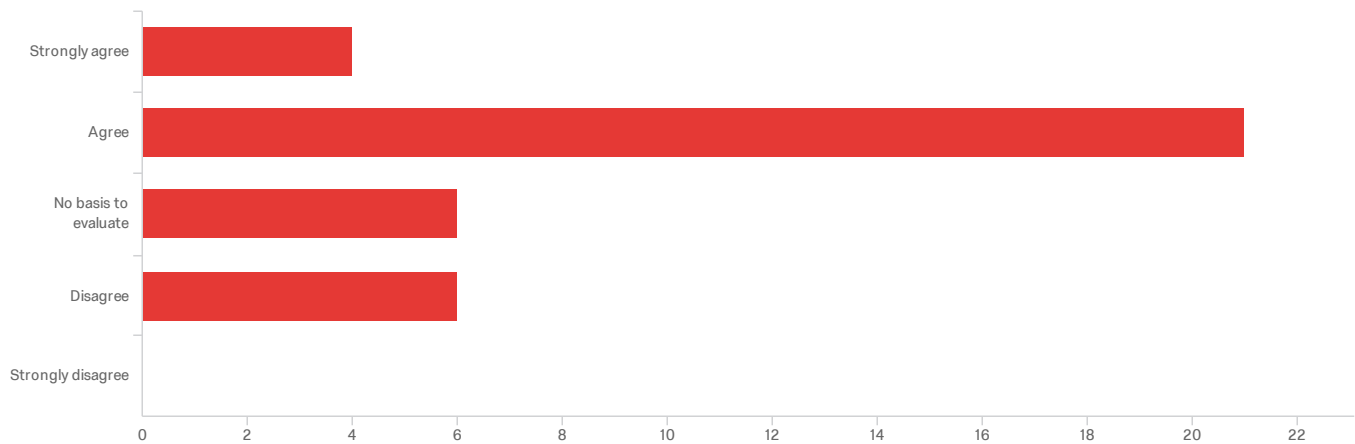


#	Field	Minimum	Maximum	Mean	Std Deviation	Variance	Count
1	How well do you feel you understand the roles and responsibilities of Finance & Operations?	1.00	3.00	1.53	0.64	0.41	38

#	Field	Choice Count
1	Very well	55.26% 21
2	Somewhat well	36.84% 14
3	Not very well	7.89% 3
4	Not well at all	0.00% 0
5	Not sure	0.00% 0
		38

Showing rows 1 - 6 of 6

Q2 - My overall assessment of the leadership of Finance & Operations is favorable.

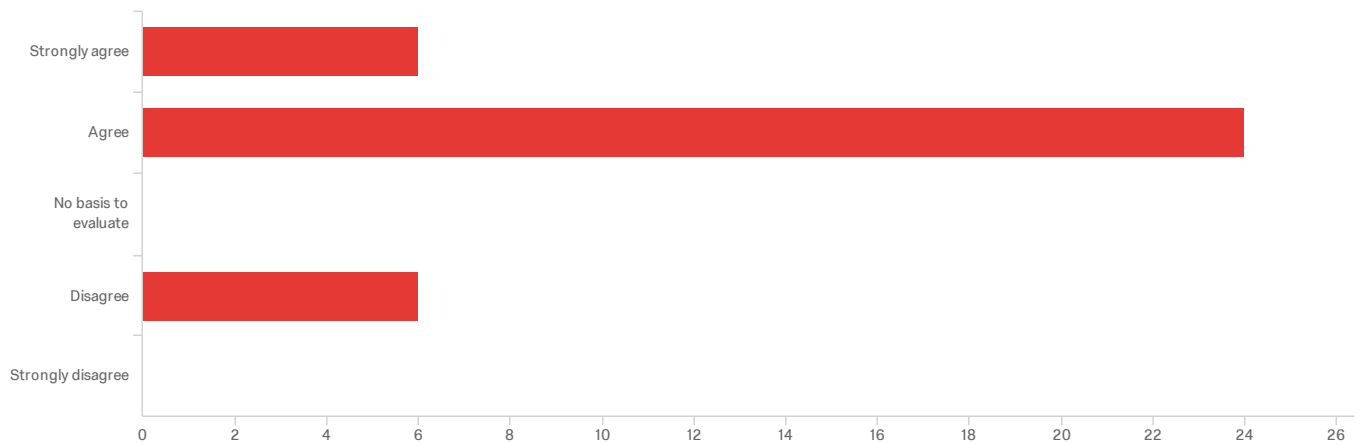


#	Field	Minimum	Maximum	Mean	Std Deviation	Variance	Count
1	My overall assessment of the leadership of Finance & Operations is favorable.	1.00	4.00	2.38	0.88	0.78	37

#	Field	Choice Count
1	Strongly agree	10.81% 4
2	Agree	56.76% 21
3	No basis to evaluate	16.22% 6
4	Disagree	16.22% 6
5	Strongly disagree	0.00% 0
		37

Showing rows 1 - 6 of 6

Q3 - My overall assessment of the effectiveness of Finance & Operations is favorable.

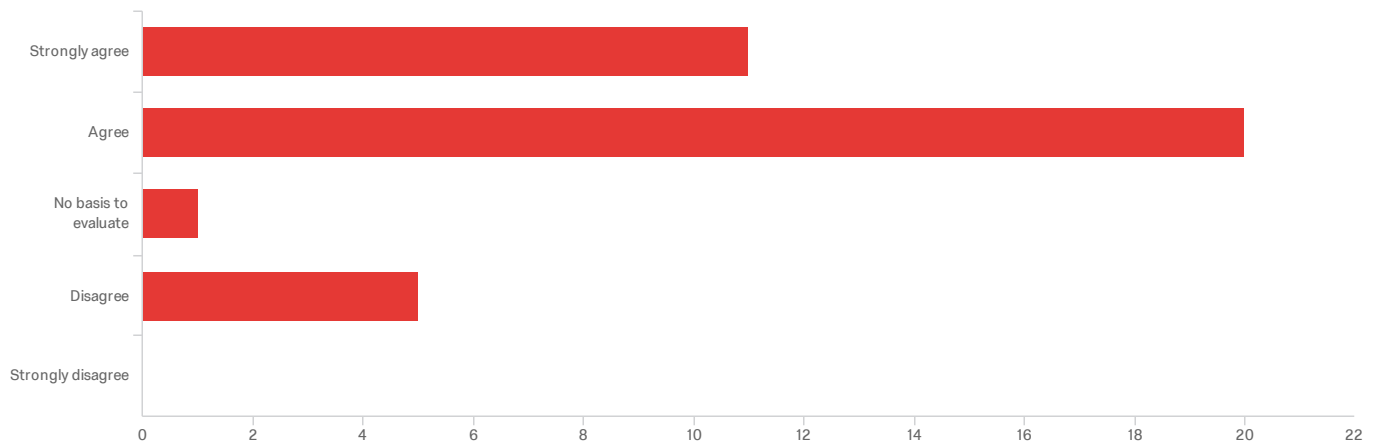


#	Field	Minimum	Maximum	Mean	Std Deviation	Variance	Count
1	My overall assessment of the effectiveness of Finance & Operations is favorable.	1.00	4.00	2.17	0.90	0.81	36

#	Field	Choice Count
1	Strongly agree	16.67% 6
2	Agree	66.67% 24
3	No basis to evaluate	0.00% 0
4	Disagree	16.67% 6
5	Strongly disagree	0.00% 0
		36

Showing rows 1 - 6 of 6

Q4 - I understand the organizational structure of Finance & Operations.

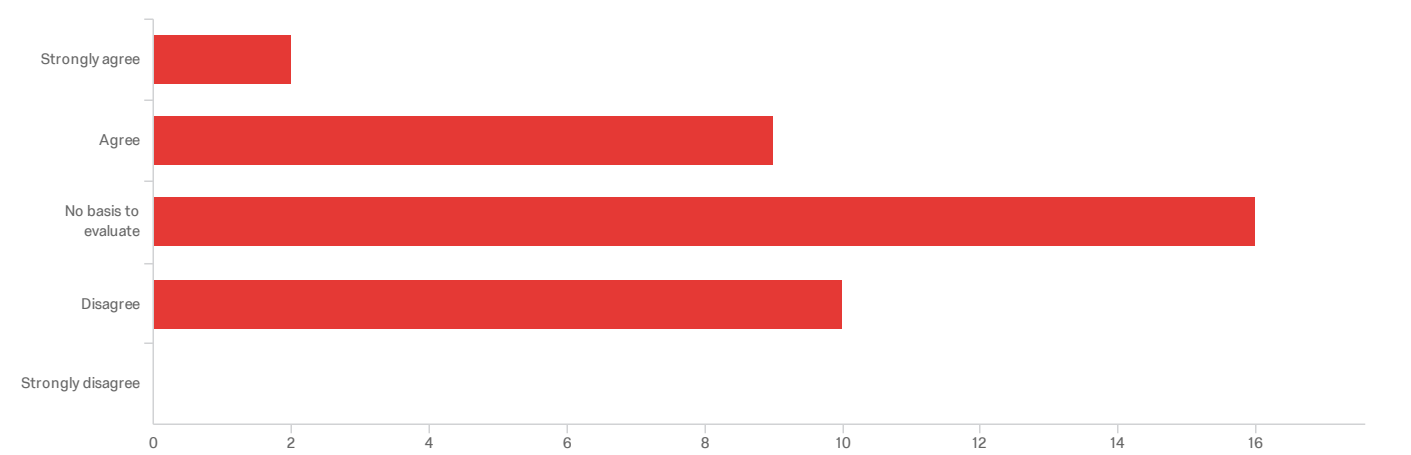


#	Field	Minimum	Maximum	Mean	Std Deviation	Variance	Count
1	I understand the organizational structure of Finance & Operations.	1.00	4.00	2.00	0.93	0.86	37

#	Field	Choice Count
1	Strongly agree	29.73% 11
2	Agree	54.05% 20
3	No basis to evaluate	2.70% 1
4	Disagree	13.51% 5
5	Strongly disagree	0.00% 0
		37

Showing rows 1 - 6 of 6

Q6 - Finance & Operations is effective in communicating how its policies and decisions affect faculty.

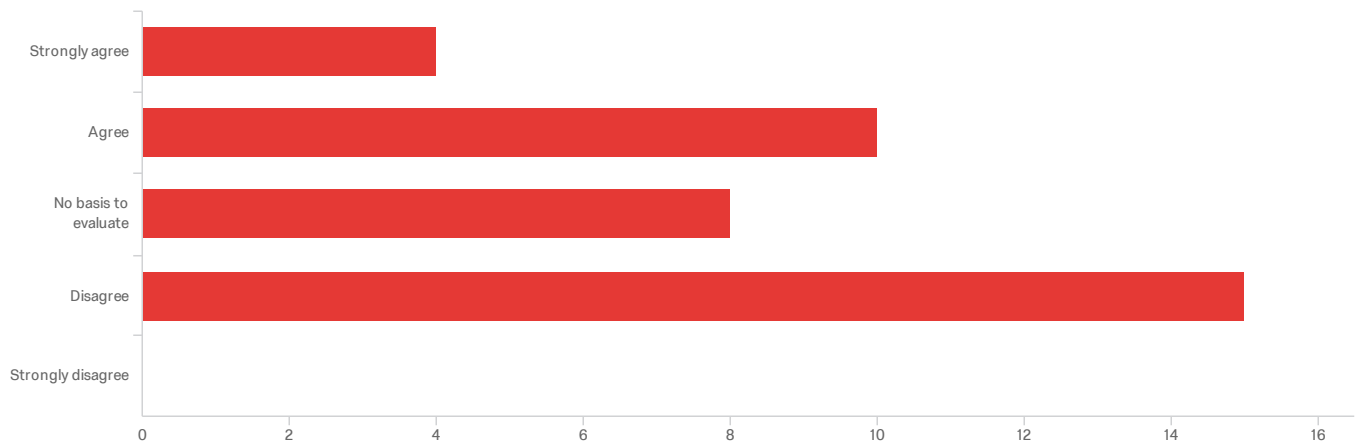


#	Field	Minimum	Maximum	Mean	Std Deviation	Variance	Count
1	Finance & Operations is effective in communicating how its policies and decisions affect faculty.	1.00	4.00	2.92	0.85	0.72	37

#	Field	Choice Count
1	Strongly agree	5.41% 2
2	Agree	24.32% 9
3	No basis to evaluate	43.24% 16
4	Disagree	27.03% 10
5	Strongly disagree	0.00% 0
		37

Showing rows 1 - 6 of 6

Q5 - Finance & Operations is effective in explaining the university's budget model.

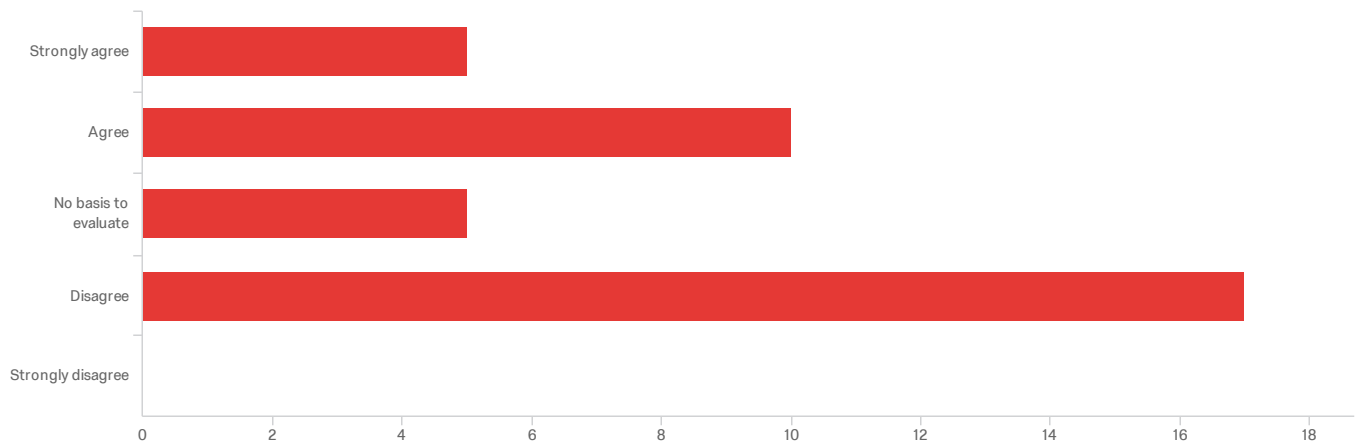


#	Field	Minimum	Maximum	Mean	Std Deviation	Variance	Count
1	Finance & Operations is effective in explaining the university's budget model.	1.00	4.00	2.92	1.05	1.10	37

#	Field	Choice Count
1	Strongly agree	10.81% 4
2	Agree	27.03% 10
3	No basis to evaluate	21.62% 8
4	Disagree	40.54% 15
5	Strongly disagree	0.00% 0
		37

Showing rows 1 - 6 of 6

Q7 - Finance & Operations is effective in communicating the challenges it faces.

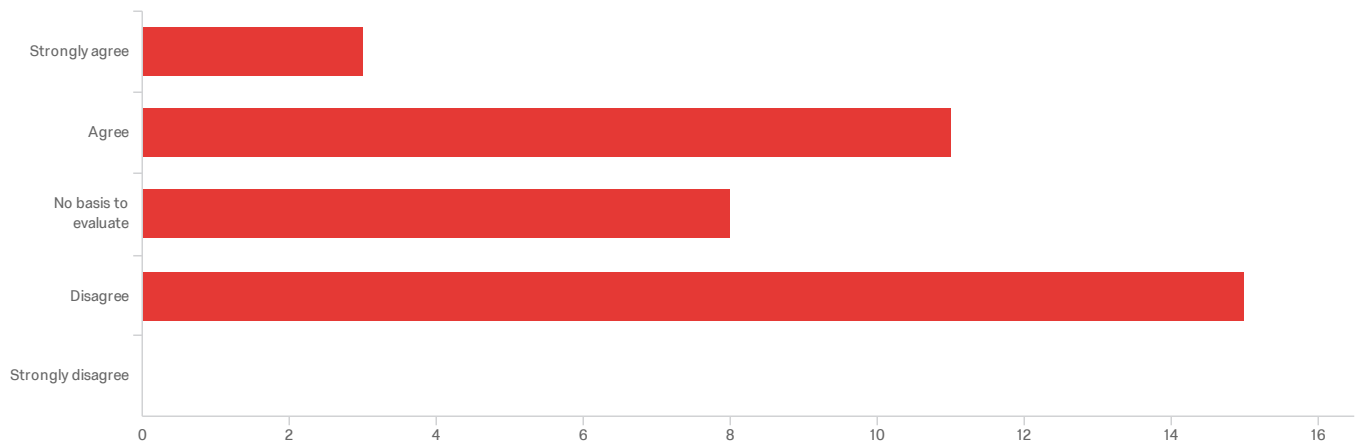


#	Field	Minimum	Maximum	Mean	Std Deviation	Variance	Count
1	Finance & Operations is effective in communicating the challenges it faces.	1.00	4.00	2.92	1.12	1.26	37

#	Field	Choice Count
1	Strongly agree	13.51% 5
2	Agree	27.03% 10
3	No basis to evaluate	13.51% 5
4	Disagree	45.95% 17
5	Strongly disagree	0.00% 0
		37

Showing rows 1 - 6 of 6

Q8 - Finance & Operations is effective in communicating its major achievements.

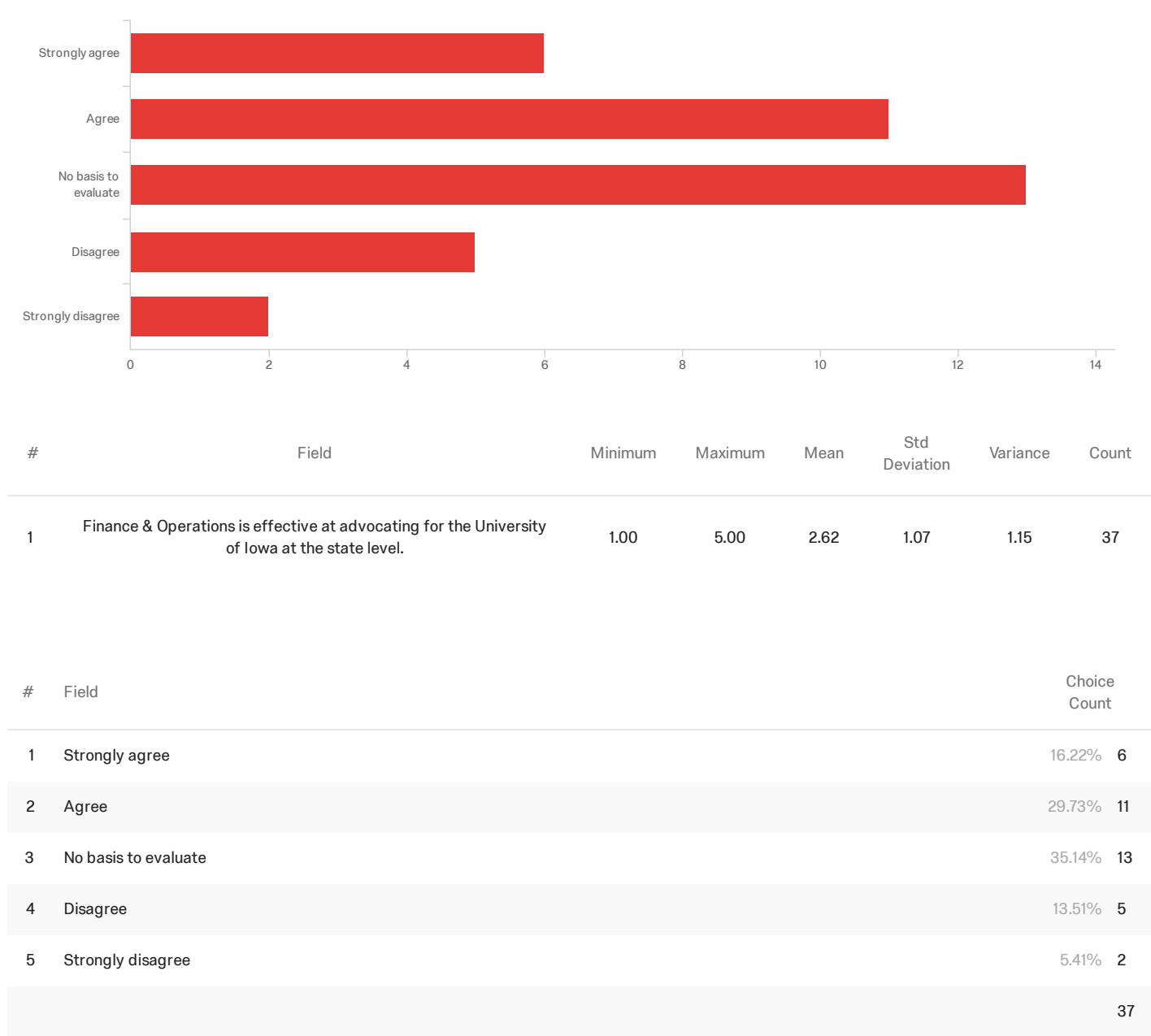


#	Field	Minimum	Maximum	Mean	Std Deviation	Variance	Count
1	Finance & Operations is effective in communicating its major achievements.	1.00	4.00	2.95	1.01	1.02	37

#	Field	Choice Count
1	Strongly agree	8.11% 3
2	Agree	29.73% 11
3	No basis to evaluate	21.62% 8
4	Disagree	40.54% 15
5	Strongly disagree	0.00% 0
		37

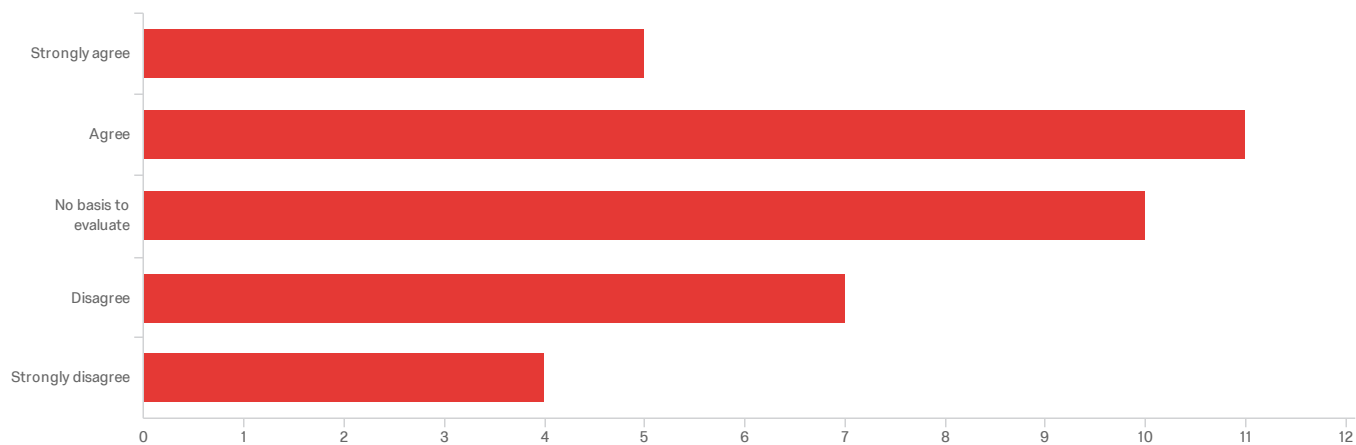
Showing rows 1 - 6 of 6

Q9 - Finance & Operations is effective at advocating for the University of Iowa at the state level.



Showing rows 1 - 6 of 6

Q10 - Finance & Operations considers an appropriate amount of input from other university stakeholders when developing and/or implementing new initiatives.

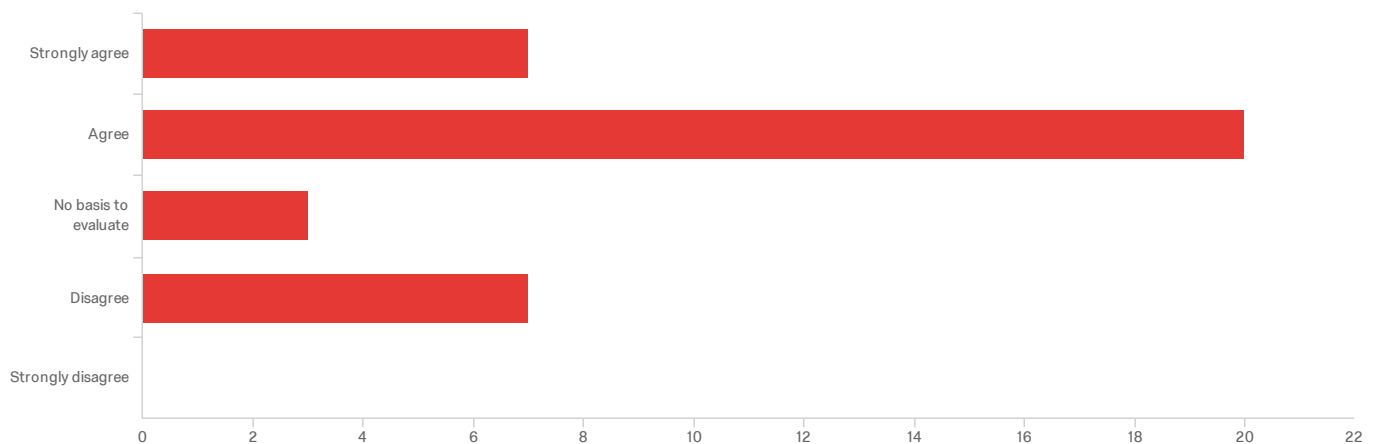


#	Field	Minimum	Maximum	Mean	Std Deviation	Variance	Count
1	Finance & Operations considers an appropriate amount of input from other university stakeholders when developing and/or implementing new initiatives.	1.00	5.00	2.84	1.20	1.43	37

#	Field	Choice Count
1	Strongly agree	13.51% 5
2	Agree	29.73% 11
3	No basis to evaluate	27.03% 10
4	Disagree	18.92% 7
5	Strongly disagree	10.81% 4
		37

Showing rows 1 - 6 of 6

Q13 - Finance & Operations adequately responds to questions or concerns.

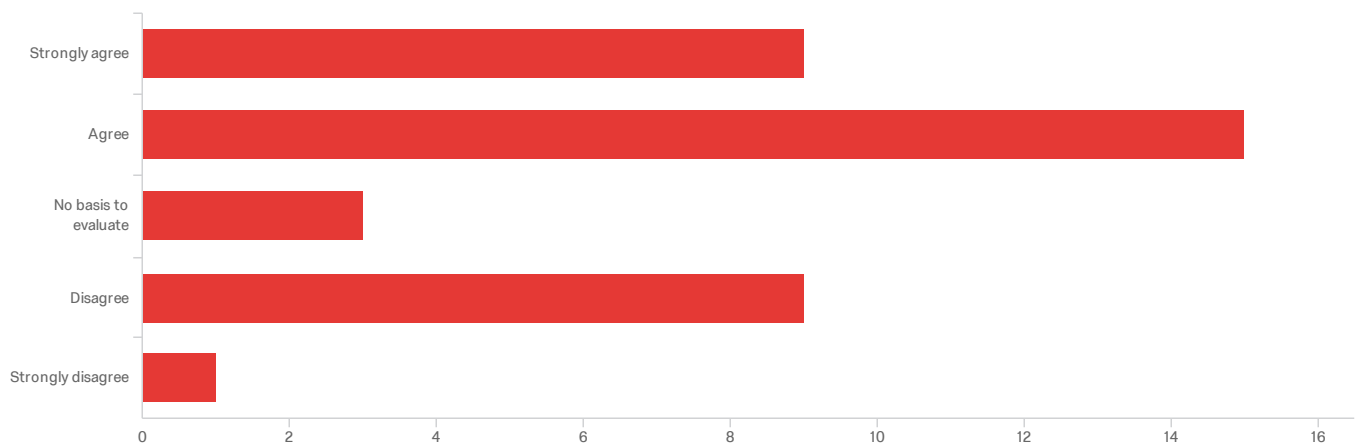


#	Field	Minimum	Maximum	Mean	Std Deviation	Variance	Count
1	Finance & Operations adequately responds to questions or concerns.	1.00	4.00	2.27	0.98	0.95	37

#	Field	Choice Count
1	Strongly agree	18.92% 7
2	Agree	54.05% 20
3	No basis to evaluate	8.11% 3
4	Disagree	18.92% 7
5	Strongly disagree	0.00% 0
		37

Showing rows 1 - 6 of 6

Q14 - Finance & Operations responds to questions or concerns in a timely manner.

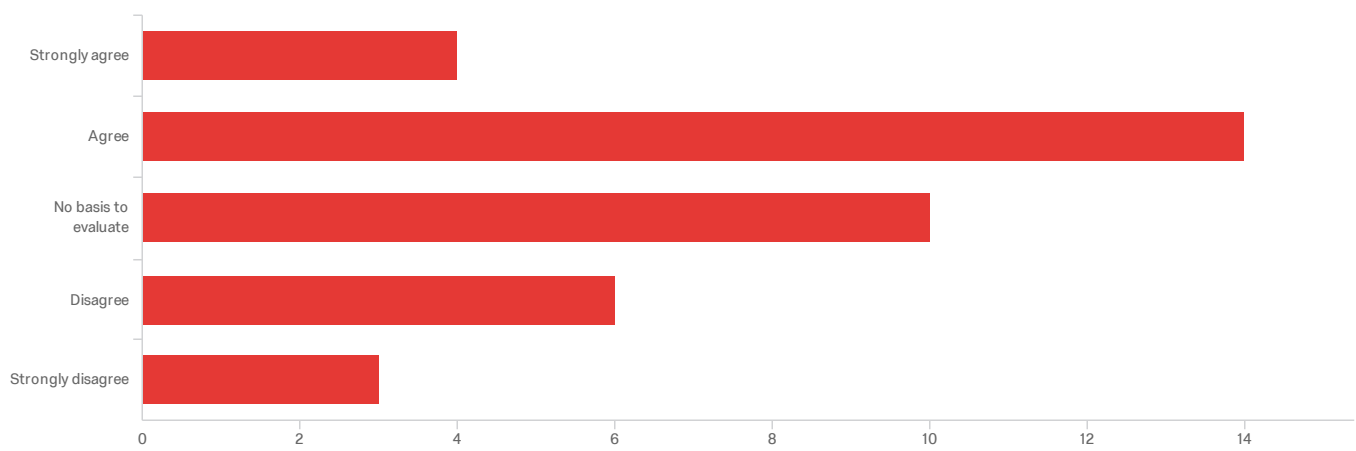


#	Field	Minimum	Maximum	Mean	Std Deviation	Variance	Count
1	Finance & Operations responds to questions or concerns in a timely manner.	1.00	5.00	2.41	1.17	1.38	37

#	Field	Choice Count
1	Strongly agree	24.32% 9
2	Agree	40.54% 15
3	No basis to evaluate	8.11% 3
4	Disagree	24.32% 9
5	Strongly disagree	2.70% 1
		37

Showing rows 1 - 6 of 6

Q15 - Finance & Operations understands how its actions affect my college, unit, or department.



#	Field	Minimum	Maximum	Mean	Std Deviation	Variance	Count
1	Finance & Operations understands how its actions affect my college, unit, or department.	1.00	5.00	2.73	1.11	1.22	37

#	Field	Choice Count
1	Strongly agree	10.81% 4
2	Agree	37.84% 14
3	No basis to evaluate	27.03% 10
4	Disagree	16.22% 6
5	Strongly disagree	8.11% 3
		37

Showing rows 1 - 6 of 6