

University of Pittsburgh  
Planning and Budgeting  
Committee Member  
Survey Results

May 2018



## Planning and Budgeting Committee Member Survey Results

University of Pittsburgh

May, 2018

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In April 2018, on behalf of the Senate Budget Policies Committee, the Office of the Controller assisted in conducting a survey of Planning and Budgeting Committee (PBC) members in regards to their experience on their unit's PBC during the FY 2018 planning cycle.

The PBC Member Survey Process was conducted as follows:

### Phase 1:

- The Office of the Controller obtained a list of responsibility center business managers.
- 33 business managers were contacted in order to have them provide a list of PBC members.
- Information was received from 31 business managers - a 94% response rate. Identified in this process were 26 distinct PBCs consisting of 317 individuals.
- Of the 317 individuals:
  - 85 were identified as Ex-Officio.
  - Time served on PBC was provided for 276 individuals. The number of years served ranged from 1 to 24 years (average = 4.1 years).

### Phase 2:

- 317 PBC members were sent an invitation to participate in the web-based survey.
- 147 of the 317 or 46% of PBC members completed the survey.
- An additional 51 started the survey but did not finish and are not included in the analysis.

The analysis that follows contains information from Phase 2 of the survey process. Note that percentages may not total to 100% due to rounding.

<b>Academic Area of PBC</b>	<b>Surveys Sent</b>	<b>Surveys Completed</b>	<b>Response Rate</b>
Arts & Sciences (including CGS and Honors College)	29	8	28%
Health Sciences	76	48	63%
Major academic centers and ULS	83	27	33%
Professional Schools (Business, Education, Engineering, Law, GSPIA, Social Work, Computing and Information)	48	31	65%
Regional Campus	54	17	31%
University	27	16	59%
<b>Total</b>	<b>317</b>	<b>147</b>	<b>46%</b>

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## 1. Please indicate the academic area in which your PBC resides:

	#	% Total
Arts & Sciences	8	5%
Health Sciences	48	33%
Major Academic Centers	27	18%
Professional Schools	31	21%
Regional Campuses	17	12%
University	16	11%
<b>Total</b>	<b>147</b>	<b>100%</b>

## 2. What level unit does your PBC represent?

	Academic Area													
	Total		Arts & Sciences		Health Sciences		Major Academic Centers		Professional Schools		Regional Campuses		University	
	#	% Total	#	% Total	#	% Total	#	% Total	#	% Total	#	% Total	#	% Total
Department	21	14%	1	13%	6	13%	4	15%	2	6%	1	6%	7	44%
School, Center, or Regional Campus	118	80%	7	88%	40	83%	22	81%	29	94%	16	94%	4	25%
Senior Vice Chancellor Area	1	1%			1	2%								
University	7	5%			1	2%	1	4%					5	31%
<b>Total</b>	<b>147</b>	<b>100%</b>	<b>8</b>	<b>100%</b>	<b>48</b>	<b>100%</b>	<b>27</b>	<b>100%</b>	<b>31</b>	<b>100%</b>	<b>17</b>	<b>100%</b>	<b>16</b>	<b>100%</b>

## 3. What was your role on the Planning and Budgeting Committee?

	Academic Area													
	Total		Arts & Sciences		Health Sciences		Major Academic Centers		Professional Schools		Regional Campuses		University	
	#	% Total	#	% Total	#	% Total	#	% Total	#	% Total	#	% Total	#	% Total
Administration	32	22%			12	25%	5	19%	5	16%	9	53%	1	6%
Faculty	64	44%	3	38%	27	56%	8	30%	16	52%	6	35%	4	25%
Staff	47	32%	5	63%	8	17%	14	52%	8	26%	1	6%	11	69%
Student	4	3%			1	2%			2	6%	1	6%		
<b>Total</b>	<b>147</b>	<b>100%</b>	<b>8</b>	<b>100%</b>	<b>48</b>	<b>100%</b>	<b>27</b>	<b>100%</b>	<b>31</b>	<b>100%</b>	<b>17</b>	<b>100%</b>	<b>16</b>	<b>100%</b>

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## 4. Were you the committee chair?

	Academic Area													
	Total		Arts & Sciences		Health Sciences		Major Academic Centers		Professional Schools		Regional Campuses		University	
	#	% Total	#	% Total	#	% Total	#	% Total	#	% Total	#	% Total	#	% Total
Yes	14	10%			4	8%	3	11%	4	13%	2	12%	1	6%
No	133	90%	8	100%	44	92%	24	89%	27	87%	15	88%	15	94%
<b>Total</b>	<b>147</b>	<b>100%</b>	<b>8</b>	<b>100%</b>	<b>48</b>	<b>100%</b>	<b>27</b>	<b>100%</b>	<b>31</b>	<b>100%</b>	<b>17</b>	<b>100%</b>	<b>16</b>	<b>100%</b>

## 5. How many times was your committee scheduled to meet during the last academic year (July 2016 - June 2017)?

	Academic Area													
	Total		Arts & Sciences		Health Sciences		Major Academic Centers		Professional Schools		Regional Campuses		University	
	#	% Total	#	% Total	#	% Total	#	% Total	#	% Total	#	% Total	#	% Total
0	7	5%	1	13%	2	4%	1	4%	2	6%			1	6%
1 - 5	79	54%	1	13%	26	54%	12	44%	20	65%	11	65%	9	56%
6 - 10	22	15%	5	63%	5	10%	2	7%	7	23%			3	19%
11 - 15	20	14%			15	31%	1	4%	1	3%	1	6%	2	13%
16 - 20	4	3%					1	4%	1	3%	2	12%		
21 - 25	5	3%					5	19%						
26+	7	5%					5	19%			2	12%		
No Response	3	2%	1	13%							1	6%	1	6%
<b>Total</b>	<b>147</b>	<b>100%</b>	<b>8</b>	<b>100%</b>	<b>48</b>	<b>100%</b>	<b>27</b>	<b>100%</b>	<b>31</b>	<b>100%</b>	<b>17</b>	<b>100%</b>	<b>16</b>	<b>100%</b>

## 6. How many times did your PBC meet during the last academic year?

	Academic Area													
	Total		Arts & Sciences		Health Sciences		Major Academic Centers		Professional Schools		Regional Campuses		University	
	#	% Total	#	% Total	#	% Total	#	% Total	#	% Total	#	% Total	#	% Total
0	7	5%	1	13%	1	2%	1	4%	3	10%			1	6%
1 - 5	80	54%	3	38%	26	54%	12	44%	20	65%	11	65%	8	50%
6 - 10	34	23%	3	38%	18	38%	2	7%	6	19%			5	31%
11 - 15	6	4%			2	4%	1	4%	1	3%	1	6%	1	6%
16 - 20	4	3%					1	4%	1	3%	2	12%		
21 - 25	7	5%					7	26%						
26+	5	3%					3	11%			2	12%		
No Response	4	3%	1	13%	1	2%					1	6%	1	6%
<b>Total</b>	<b>147</b>	<b>100%</b>	<b>8</b>	<b>100%</b>	<b>48</b>	<b>100%</b>	<b>27</b>	<b>100%</b>	<b>31</b>	<b>100%</b>	<b>17</b>	<b>100%</b>	<b>16</b>	<b>100%</b>

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### 7. Of those meetings, how many were primarily conducted:

	Academic Area						
	Total	Arts & Sciences	Health Sciences	Major Academic Centers	Professional Schools	Regional Campuses	University
In Person	91%	100%	84%	96%	94%	93%	99%
Video	7%	0%	16%	2%	6%	4%	0%
Email	1%	0%	1%	2%	0%	3%	1%
<b>Total</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>

Note: Individual responses were averaged for presentation purposes.

### 8. Estimate by percentage (%) the approximate time the Committee spends on the following (responses must total 100%).

	Academic Area						
	Total	Arts & Sciences	Health Sciences	Major Academic Centers	Professional Schools	Regional Campuses	University
Budget	30%	10%	45%	12%	20%	28%	46%
Program Development	19%	7%	24%	23%	15%	18%	12%
Strategic Planning	42%	81%	23%	58%	47%	48%	35%
Other	9%	2%	8%	7%	17%	6%	8%
<b>Total</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>

Note: Individual responses were averaged for presentation purposes.

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## 9. During your time on the PBC, were you provided relevant data on any or all of the following areas (as specified by the Planning and Budgeting System (PBS) document section 3.3.2):

Budget	Academic Area													
	Total		Arts & Sciences		Health Sciences		Major Academic Centers		Professional Schools		Regional Campuses		University	
	#	% Total	#	% Total	#	% Total	#	% Total	#	% Total	#	% Total	#	% Total
Yes	97	66%	6	75%	41	85%	10	37%	14	45%	13	76%	13	81%
No	38	26%	1	13%	6	13%	17	63%	11	35%	3	18%		
Not Sure/Not Applicable	10	7%	1	13%					6	19%			3	19%
No Response	2	1%			1	2%					1	6%		
<b>Total</b>	<b>147</b>	<b>100%</b>	<b>8</b>	<b>100%</b>	<b>48</b>	<b>100%</b>	<b>27</b>	<b>100%</b>	<b>31</b>	<b>100%</b>	<b>17</b>	<b>100%</b>	<b>16</b>	<b>100%</b>

### Staffing Levels for Faculty and Staff

Yes	69	47%	3	38%	24	50%	12	44%	10	32%	10	59%	10	63%
No	55	37%	3	38%	17	35%	14	52%	15	48%	3	18%	3	19%
Not Sure/Not Applicable	20	14%	2	25%	6	13%	1	4%	6	19%	2	12%	3	19%
No Response	3	2%			1	2%					2	12%		
<b>Total</b>	<b>147</b>	<b>100%</b>	<b>8</b>	<b>100%</b>	<b>48</b>	<b>100%</b>	<b>27</b>	<b>100%</b>	<b>31</b>	<b>100%</b>	<b>17</b>	<b>100%</b>	<b>16</b>	<b>100%</b>

### Planning Assumptions and Outcomes

Yes	100	68%	6	75%	32	67%	23	85%	16	52%	13	76%	10	63%
No	26	18%	2	25%	7	15%	3	11%	10	32%	2	12%	2	13%
Not Sure/Not Applicable	18	12%			7	15%	1	4%	5	16%	1	6%	4	25%
No Response	3	2%			2	4%					1	6%		
<b>Total</b>	<b>147</b>	<b>100%</b>	<b>8</b>	<b>100%</b>	<b>48</b>	<b>100%</b>	<b>27</b>	<b>100%</b>	<b>31</b>	<b>100%</b>	<b>17</b>	<b>100%</b>	<b>16</b>	<b>100%</b>

### Enrollment Patterns

Yes	71	48%	5	63%	27	56%	3	11%	16	52%	14	82%	6	38%
No	34	23%	1	13%	13	27%	8	30%	10	32%			2	13%
Not Sure/Not Applicable	39	27%	2	25%	7	15%	16	59%	5	16%	1	6%	8	50%
No Response	3	2%			1	2%					2	12%		
<b>Total</b>	<b>147</b>	<b>100%</b>	<b>8</b>	<b>100%</b>	<b>48</b>	<b>100%</b>	<b>27</b>	<b>100%</b>	<b>31</b>	<b>100%</b>	<b>17</b>	<b>100%</b>	<b>16</b>	<b>100%</b>

### Most Recent Revenue and Cost Attribution Study

Yes	35	24%	2	25%	13	27%	3	11%	5	16%	5	29%	7	44%
No	63	43%	3	38%	22	46%	13	48%	17	55%	6	35%	2	13%
Not Sure/Not Applicable	46	31%	3	38%	12	25%	11	41%	9	29%	4	24%	7	44%
No Response	3	2%			1	2%					2	12%		
<b>Total</b>	<b>147</b>	<b>100%</b>	<b>8</b>	<b>100%</b>	<b>48</b>	<b>100%</b>	<b>27</b>	<b>100%</b>	<b>31</b>	<b>100%</b>	<b>17</b>	<b>100%</b>	<b>16</b>	<b>100%</b>

### Other Data Requested by PBC Members

Yes	40	27%			15	31%	5	19%	10	32%	4	24%	6	38%
No	25	17%	3	38%	6	13%	5	19%	8	26%	1	6%	2	13%
Not Sure/Not Applicable	71	48%	5	63%	23	48%	15	56%	12	39%	8	47%	8	50%
No Response	11	7%			4	8%	2	7%	1	3%	4	24%		
<b>Total</b>	<b>147</b>	<b>100%</b>	<b>8</b>	<b>100%</b>	<b>48</b>	<b>100%</b>	<b>27</b>	<b>100%</b>	<b>31</b>	<b>100%</b>	<b>17</b>	<b>100%</b>	<b>16</b>	<b>100%</b>

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10. For the most recent operational planning and budgeting cycle, were the members of your PBC provided information about assumptions and projections concerning external circumstances which impact upon the University’s planning, such as inflation, demographics, the Commonwealth appropriation, endowment and gift income, and costs of services and supplies? (PBS document section 3.3.3.)

	Academic Area													
	Total		Arts & Sciences		Health Sciences		Major Academic Centers		Professional Schools		Regional Campuses		University	
	#	% Total	#	% Total	#	% Total	#	% Total	#	% Total	#	% Total	#	% Total
Yes	74	50%	5	63%	24	50%	7	26%	13	42%	14	82%	11	69%
No	72	49%	3	38%	23	48%	20	74%	18	58%	3	18%	5	31%
No Response	1	1%			1	2%								
<b>Total</b>	<b>147</b>	<b>100%</b>	<b>8</b>	<b>100%</b>	<b>48</b>	<b>100%</b>	<b>27</b>	<b>100%</b>	<b>31</b>	<b>100%</b>	<b>17</b>	<b>100%</b>	<b>16</b>	<b>100%</b>

11. The Planning and Budgeting System document states, “Department chairs, heads of the responsibility centers, and senior vice chancellors are responsible for forwarding their areas’ proposals to the next higher level, noting any significant alternative recommendations supported by their PBCs and explaining why they have not been incorporated. They shall provide every member of their PBC a copy of the documents forwarded” (PBS document section 1.3.4).

Did you receive a copy of the final recommendations that were forwarded from your area to the next higher level?

	Academic Area													
	Total		Arts & Sciences		Health Sciences		Major Academic Centers		Professional Schools		Regional Campuses		University	
	#	% Total	#	% Total	#	% Total	#	% Total	#	% Total	#	% Total	#	% Total
Yes	86	59%	5	63%	24	50%	21	78%	18	58%	7	41%	11	69%
No	58	39%	3	38%	24	50%	5	19%	11	35%	10	59%	5	31%
No Response	3	2%					1	4%	2	6%				
<b>Total</b>	<b>147</b>	<b>100%</b>	<b>8</b>	<b>100%</b>	<b>48</b>	<b>100%</b>	<b>27</b>	<b>100%</b>	<b>31</b>	<b>100%</b>	<b>17</b>	<b>100%</b>	<b>16</b>	<b>100%</b>

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### 12. Did you have access to the strategic plans of your department/academic area and higher level areas?

	Academic Area													
	Total		Arts & Sciences		Health Sciences		Major Academic Centers		Professional Schools		Regional Campuses		University	
	#	% Total	#	% Total	#	% Total	#	% Total	#	% Total	#	% Total	#	% Total
Yes	120	82%	7	88%	35	73%	25	93%	28	90%	12	71%	13	81%
No	23	16%	1	13%	11	23%	2	7%	3	10%	4	24%	2	13%
No Response	4	3%			2	4%					1	6%	1	6%
<b>Total</b>	<b>147</b>	<b>100%</b>	<b>8</b>	<b>100%</b>	<b>48</b>	<b>100%</b>	<b>27</b>	<b>100%</b>	<b>31</b>	<b>100%</b>	<b>17</b>	<b>100%</b>	<b>16</b>	<b>100%</b>

### 13. To what extent are you as a Committee member satisfied that you have adequate data/information to make informed recommendations?

	Academic Area													
	Total		Arts & Sciences		Health Sciences		Major Academic Centers		Professional Schools		Regional Campuses		University	
	#	% Total	#	% Total	#	% Total	#	% Total	#	% Total	#	% Total	#	% Total
Considerably satisfied	50	34%	4	50%	18	38%	8	30%	8	26%	6	35%	6	38%
Moderately satisfied	51	35%	2	25%	17	35%	9	33%	9	29%	7	41%	7	44%
Somewhat dissatisfied	25	17%	1	13%	6	13%	8	30%	5	16%	4	24%	1	6%
Considerably dissatisfied	19	13%	1	13%	6	13%	1	4%	9	29%			2	13%
No Response	2	1%			1	2%	1	4%						
<b>Total</b>	<b>147</b>	<b>100%</b>	<b>8</b>	<b>100%</b>	<b>48</b>	<b>100%</b>	<b>27</b>	<b>100%</b>	<b>31</b>	<b>100%</b>	<b>17</b>	<b>100%</b>	<b>16</b>	<b>100%</b>

### 14. To what extent are you as a Committee member satisfied that you have the opportunity to ask questions necessary to make informed recommendations?

	Academic Area													
	Total		Arts & Sciences		Health Sciences		Major Academic Centers		Professional Schools		Regional Campuses		University	
	#	% Total	#	% Total	#	% Total	#	% Total	#	% Total	#	% Total	#	% Total
Considerably satisfied	74	50%	5	63%	23	48%	14	52%	13	42%	11	65%	8	50%
Moderately satisfied	44	30%	2	25%	17	35%	6	22%	7	23%	6	35%	6	38%
Somewhat dissatisfied	12	8%			4	8%	6	22%	2	6%				
Considerably dissatisfied	15	10%	1	13%	3	6%			9	29%			2	13%
No Response	2	1%			1	2%	1	4%						
<b>Total</b>	<b>147</b>	<b>100%</b>	<b>8</b>	<b>100%</b>	<b>48</b>	<b>100%</b>	<b>27</b>	<b>100%</b>	<b>31</b>	<b>100%</b>	<b>17</b>	<b>100%</b>	<b>16</b>	<b>100%</b>



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## 15. How would you rate the overall effectiveness of the planning and budgeting process in your unit?

	Academic Area													
	Total		Arts & Sciences		Health Sciences		Major Academic Centers		Professional Schools		Regional Campuses		University	
	#	% Total	#	% Total	#	% Total	#	% Total	#	% Total	#	% Total	#	% Total
Highly effective	21	14%	2	25%	7	15%	3	11%	2	6%	5	29%	2	13%
Effective	85	58%	3	38%	30	63%	17	63%	14	45%	10	59%	11	69%
Ineffective	23	16%	2	25%	6	13%	6	22%	6	19%	2	12%	1	6%
Highly ineffective	16	11%	1	13%	5	10%			9	29%			1	6%
No Response	2	1%					1	4%					1	6%
<b>Total</b>	<b>147</b>	<b>100%</b>	<b>8</b>	<b>100%</b>	<b>48</b>	<b>100%</b>	<b>27</b>	<b>100%</b>	<b>31</b>	<b>100%</b>	<b>17</b>	<b>100%</b>	<b>16</b>	<b>100%</b>