

Maximizing Institutional Capacity Through Shared Services

A Collaborative Approach

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Session Objectives

Participants will:

- Understand common institutional capacity challenges in higher education
- Explore how shared service can expand capacity while maintaining great customer service
- Review two case studies from the University of New Mexico
 - Fiscal Shared Services → Operational Efficiency
 - Institutional Analytics → Decision-Making Capacity
- Identify practical implementation strategies
- Consider scalable approaches applicable across institutions

Current Higher Education Landscape



FINANCIAL
CONSTRAINTS AND
BUDGET
REDUCTIONS



GROWING
EXPECTATIONS FOR
SERVICE AND
RESPONSIVENESS



STAFFING
SHORTAGES AND
WORKFORCE
TRANSITIONS



INCREASING
COMPLIANCE AND
REPORTING
REQUIREMENTS

Audience Poll:

What is your largest current constraint at your institution?

- Staffing shortages
- Budget reductions
- Increasing workload
- Technology limitations
- Other

Shared Services as a Strategy for Institutional Capacity

Why Shared Services?

Shared services expand institutional capacity by coordinating expertise, standardizing processes, and leveraging technology. Beyond improving operational efficiency, shared services also enhance access to information and analytics, strengthening an institution's ability to support data-informed decision making.

Key Outcomes:

- Coordinating expertise across units
- Reducing duplication of effort
- Improving consistency and quality
- Enhancing scalability
- Supporting workforce development

Case Study 1: Fiscal Shared Services

Institutional Challenge

Universities are increasingly expected to do more with fewer resources.

At UNM this created several operational pressures:

- Budget reductions across academic units
- Difficulty hiring and retaining qualified fiscal staff
- Transaction inefficiencies and inconsistent practices
- Limited access to financial data for decision making
- Fiscal related work shifted to non-fiscal staff

Result

- Units experienced inconsistent service quality and increased administrative burden.

Pilot Strategy

Initial Implementation: Pilot Shared Service Model

Rather than immediately centralizing services, UNM launched a targeted pilot.

Pilot Unit: Division for Change and Empowerment

Leadership Expectations

- Demonstrate measurable cost savings
- Deliver improved fiscal expertise and **service quality**
- Participation must remain voluntary
- Model must be financially self-sustaining

This pilot allowed the institution to test the model without large structural changes or financial risk.

Pilot Design

The pilot balanced standardization and flexibility.

Key elements included:

- Shared service agreement defining services and expectations
- Alignment with Academic Affairs fiscal best practices
- Ability for units to retain customized processes when appropriate
- Dedicated fiscal advisor embedded with the unit
- Relationship-based service model (office hours, regular meetings).

Outcome

The pilot successfully demonstrated improved service quality and efficiency, leading to renewal and approval for expansion.

Expansion & Challenges

Expansion: New Opportunities and Emerging Challenges

As additional units joined Fiscal Shared Services, new operational realities emerged.

Challenges Identified

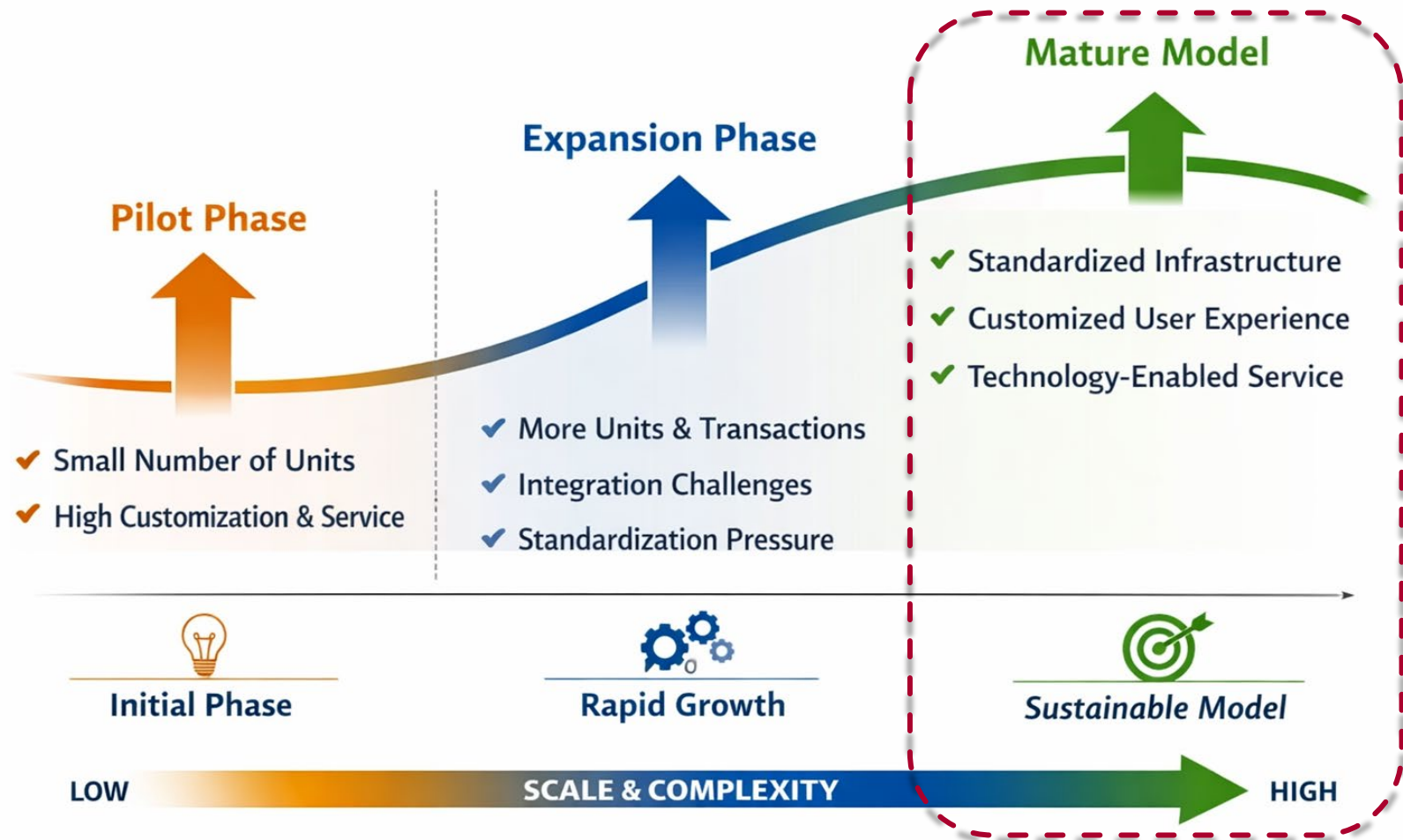
- Growing transaction volume
- Different unit cultures and fiscal practices
- Risk of losing personalized customer service
- Standardization pressures vs unit autonomy

Key Question

How do you scale shared services **without losing the service quality and uniqueness units expect?**

Shared Service Growth Curve

Shared Services Growth Curve



Scaling Shared Services: Moving from Advisor-Centered to Team-Based Operations

As FSSC expanded, the initial staffing structure created capacity constraints. To address these challenges, FSSC transitioned to a **team-based service model**.

Advisor-centered structure:

Fiscal advisor as main departmental contact

Advisors delegating transactions to interns

High purchasing and transaction volume

Limited time for accounting work

Communication bottlenecks



Team-based shared service model:

Accountants, analysts, technicians, and interns

Teams aligned with similar academic units

Shared communication channels

Built-in workload coverage

Advisors able to focus on fiscal analysis and higher-level accounting

Workforce Development- Student interns are integrated into the model, creating a pipeline from student employment to professional fiscal staff roles.

Scaling Shared Services: Process Innovation

Maintaining Service Quality While Scaling

Rather than requiring every unit into identical processes, FSSC adopted a **hybrid strategy**.

Core Standardization

- Transaction processing
- Compliance practices
- Financial oversight

Customized User Experience

- Automated fiscal reporting tailored to units
- Budget and forecasting tools
- Transaction tracking dashboards

Units retained **familiar workflows** while backend processing remained standardized.

Scaling Shared Services: Through Technology

Unit Facing Tools

- Automated fiscal reporting dashboards
- Customized financial and budget management reports
- Multi-year budget forecasting model used across all participating units
- Tools provide departments with direct access to fiscal information and budget projections, supporting better planning and decision making.

FSSC Operational Tools

- Transaction research and tracking tools
- Account reconciliation support and trend analysis tools
- Processing and workload tracking dashboards
- Tools allow the FSSC team to monitor workflow, manage processing time, and ensure compliance with service level agreements.

Impact

- Expand services to more units without increasing staff
- Provide departments with faster access to financial information
- Improve workload management and operational oversight
- Maintain high service quality as demand increased

Unified Purchasing Request Form


FSS Unit Dashboard (View Only) :



To submit a new request, click on the tile to the left, or fill out the form below. If you do not see your unit listed in the Unit dropdown, please reach out to your fiscal agent to ensure your unit has been set up to use the Purchase Request Form.

Dynamic Views

Dynamic Views allow you to view the progress of tasks in real time. For Department Approvers, you can see a list of all requests that are currently pending your approval. For Department Administrators, you can see a list of all requests that have been submitted by your department faculty/staff. And for Requestors, you can see a list of all requests you have submitted.

 THE UNIVERSITY OF NEW MEXICO

FSS Purchase Request Form

Request Name *
Enter a short description to be used as the title of your request

Your Name *

Your Email *

Unit *
Search through the dropdown menu or begin typing your unit name. If you don't find your unit listed, try using its abbreviation

Please select a request category below: *

Reimbursement for expenses paid out of pocket

Dynamic Views for Approvers

This page shows all requests that have been submitted to FSS by your unit that are currently pending your approval.

First, select the approver group you are in from the links below. Then, to approve a request, select the row you would like to review. Then, in the detail panel to the right, indicate whether you approve or decline the request in the Approval Status dropdown menu. Then click Save at the

- [Approver Group 1](#)
- [Approver Group 2](#)
- [Conditional Approver Group](#)

Troubleshooting

I can't access the Dynamic Views

If this is your first time logging in to Smartsheet, you first need to following the instructions on this FastInfo page:
https://unm.custhelp.com/app/answers/detail/a_id/8039/-/what-is-smartsheet-and-how-do-i-get-access%3F

Once you've completed the registration instructions on that FastInfo page, you should be able to access the Dynamic Views.

Approver Group Dynamic View is empty

You are either looking in the wrong approver group view or there are simply no requests that are currently pending approval.

I approved a request, but it's still showing on my Approver Dynamic View page

Dynamic Views for Requestors & Admins

To focus on only active tasks, click on the Filter dropdown menu in the upper left of the dynamic view page, then select Show Only Active Tasks.

- [Administrative View](#)
- [Requestor View](#)

Status Descriptions

(All tasks default to "Queued" while they are being reviewed by department approvers. If your request says "Queued" and the approval status is still "Pending", then it hasn't entered the FSS processing queue yet)

Queued: The task has been approved and is in line to be processed by FSS, but has not been started yet.

In Progress: FSS has begun working on this task, but it hasn't been completed yet.

Vendor Add In Progress: The vendor has been sent an email from UNM with instructions to register as a new payee.

Submitted: FSS has submitted your request and it is now pending approval or other additional steps by other offices.

Other (see Comments): Go to the Requestor View to view the comments on your request for more information.

Complete: FSS has finished working on this task.

Approval Status

Pending: The request is still pending review by one or more approvers.

FSSC Task Assignment Sheet and Internal Progress Tracking

File Automation Forms Connections Dynamic View FSS Tasks ★ ↻

Grid ▾ All Pending-Not Started Tasks ▾ | Arial | 10 | B I U | Grid

	FSS Aging	Task Name	Category	High Pri...	Unit	FSS Delegator	Assigned To	Start Date	Status
1	0	Christopher F. Wilson	4. Purchase Order	⚑	Compliance, Ethics, an	FC Francisco Certain	RD Ruth Doan	02/20/26	In Progress
9	2	UNMPD_Amazon order	4. Purchase Order	⚑	UNMPD	MM Mark Maddaleni	AL Austin Love	02/18/26	In Progress
10	2	Art Museum office order	Staff: PCard Purchas	⚑	CFA: Art Museum	MA Marissa Almanza	AL Austin Love	02/18/26	In Progress
12	2	Student Santa Fe travel RI	1. Reimbursement	⚑	CFA: Music	MA Marissa Almanza	MA Marissa Almanza	02/18/26	In Progress

FSSC Task Assignment Tracker Dashboard

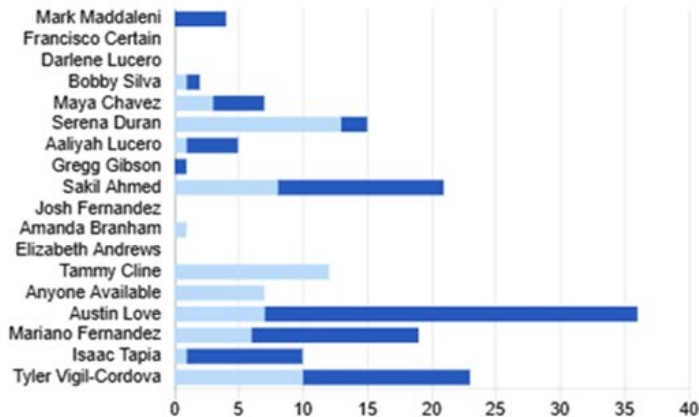
🕒 FSS Task Dashboard ★

FSS Tasks Dashboard

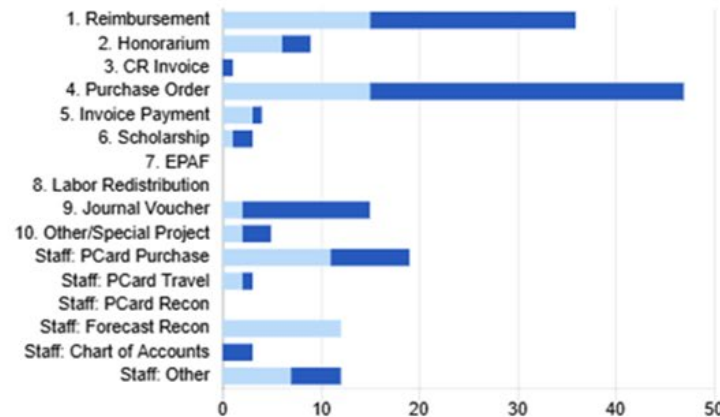


Welcome to the FSS Task Dashboard! This Dashboard refreshes every couple minutes, so check back to see the status of pending tasks by different categories

Pending Tasks by Person



Pending Tasks by Category



Pending Requests

5

Queued

76

In Progress

93

Completed

2,914

FSSC Task Assignment Progress Tracking- For Unit's View

☆ Admin Dynamic View (FSS) ⓘ

⌵ Show Only Active Requests/Tasks ▾
📄
🔗

Created	Sheet Name	Task/Request Name	Unit	Category	Requestor	Amount	Status	Final Approval Status
2026-02-20T16:59:01Z	FSS New Requests	UNM-LA folders	LA_Student Affairs	Staff: PCard Purchase	Beth Rue	\$1,172.26	Queued	Pending Review
2026-02-19T23:28:20Z	FSS New Requests	IPR_Travel Mr. Ye car rental_26.01.23	LA_Instruction	1. Reimbursement	Ivette Jimenez	\$159.02	Queued	Pending Review
2026-02-19T22:49:37Z	FSS New Requests	IPR_Interview Lunches_26.02.18	LA_Instruction	Staff: PCard Purchase	Ivette Jimenez	\$66.06	Queued	Pending Review
2026-02-19T22:12:50Z	FSS New Requests	Reimburse_Gallup Div Summ_26.01.29	LA_Instruction	Staff: PCard Purchase	Ivette Jimenez	\$430.45	Queued	Pending Review
2026-02-19T21:29:06Z	FSS New Requests	IPR_Interview Lunches_26.02.17	LA_Instruction	Staff: PCard Purchase	Ivette Jimenez	\$56.27	Queued	Pending Review
2026-02-19T20:07:42Z	FSS New Requests	Reimburse_Travel Koutsakis_26.02.17	LA_Instruction	1. Reimbursement	Ivette Jimenez	\$111.11	Queued	Pending Review
2026-02-19T18:25:51Z	FSS New Requests	IPR_Travel Koutsakis_26.02.17	LA_Instruction	Staff: PCard Purchase	Ivette Jimenez	\$147.27	Queued	Pending Review
2026-02-17T19:38:53Z	FSS Tasks	CEIA Membership	LA_Title V Grant	Staff: PCard Purchase	Brittany Carpenter	\$200.00	Submitted	Approved
2026-02-16T19:13:50Z	FSS Tasks	Adult Ed ESL textbooks	LA_Instruction	Staff: PCard Purchase	Catherine Ozment	\$2,694.04	Submitted	Approved
2026-02-14T00:11:33Z	FSS Tasks	NAVA GAXIOLA Conference: 105th MAA Texas	LA_Instruction	Staff: PCard Travel	Citlaliti Nava Gaxiola	\$1,500.00	Submitted	Approved
2026-02-11T21:44:23Z	FSS Tasks	Books and materials	LA_Instruction	Staff: PCard Purchase	Virginia Grant	\$105.00	In Progress	Approved

FSSC Custom Reports and Forecasting/Budget Tools

COLLEGE OF EDUCATION & HUMAN SCIENCES		Updated: 12/15/2024				
College of Education (COE) FY25-FY29 Net Balance Summary		Reconciled: 11/30/2024				
Index	Title	FY25 Net	FY26 Net	FY27 Net	FY28 Net	FY29 Net
522000 (0&G)	Dean's Reserves	5,900,070	6,050,114	6,100,158	6,233,735	6,367,312
522011 (0&G)	Dean's Operating	114,438	41,269	41,267	41,265	41,263
522022 (0&G)	COE Development	10,000	10,000	10,000	10,000	10,000
522024 (0&G)	COE Summer Instruction	278,439	278,439	278,439	278,439	278,439
522025 (0&G)	COE Summer Instruction - IFCE	(36,559)	-	-	-	-
522026 (0&G)	COE Summer Instruction HESS	(42,963)	-	-	-	-
522028 (0&G)	COE Summer Instruction ES	(28,559)	-	-	-	-
522029 (0&G)	COE Summer Instruction LLS5	(32,790)	-	-	-	-
522101 (0&G)	COE Summer Instruction TEELP	(59,141)	-	-	-	-
522015 (F&A)	Dean's F&A	336,956	0	0	0	0
522025 (Non-Endowed)	Dean's Non-Endowed Spending	26,574	1	1	1	1
522029 (F&A)	COE PPE	32,873	32,873	32,873	32,873	32,873
522025 (0&G)	COE Accreditation	52,793	52,793	52,793	52,793	52,793
522108 (0&G)	COE Distance Education	122,263	122,262	122,272	122,291	122,291
522245 (F&A)	COE Start-Up Funds	31,126	31,126	31,126	31,126	31,126
522250 (0&G)	COE Recruitment	(430)	65,000	65,000	65,000	65,000
522230 (Non-Endowed)	Austria Exchange STARS	-	-	-	-	-
522230 (0&G)	COE Computer Refresh	60,868	60,868	60,868	60,868	60,868
522112 (0&G)	COE PD/Teach	89,782	110,000	110,000	110,000	110,000
522333 (0&G)	Dean's Discretionary Fund	255,079	255,079	255,079	255,079	255,079
062000 (F&A)	Multicultural Education Center	2,020	2,020	2,020	2,020	2,020
522000 (F&A)	CCRCE F&A	298,711	298,711	298,711	298,711	298,711
522241 (0&G)	COE - Convocation	22,291	22,291	22,291	22,291	22,291
522340 (0&G)	COE - Student Recruitment & Retention	22,511	0	0	0	0
522339	Gallup-Economic Future	207,761	-	-	-	-
522246 (0&G)	COEH5 Residences	5,846	-	-	-	-
522254	Dean's Graduate Student Research Felo	149,276	-	-	-	-
Summary		\$ 7,819,247	\$ 7,382,847	\$ 7,482,899	\$ 7,616,483	\$ 7,750,068

F&A	Index	Name	Balance
525037 (F&A)	168	F&A Saavedra Comadre (OC) Eba	168
Updated through November 2024			
HESS	353000 (0&G)	HESS Operating	40,596
HESS	353100 (0&G)	HESS PEMP	4,005
HESS	353127 (0&G)	HESS GA/TA and Tuition Waivers	39,172
HESS	353006 (F&A)	HESS F&A	-
IFCE	734005 (0&G)	IFCE Operating	(44,090)
IFCE	734007 (F&A)	IFCE F&A	40,054
TEELP	795000 (0&G)	TEELP Operating	89,602
TEELP	795001 (F&A)	TEELP F&A	29,997
LLSS	842000 (0&G)	LLSS Operating	(22,154)
LLSS	842006 (F&A)	LLSS F&A	9,951
SPCD	971003 (0&G)	Spec. Ed. Operating	17,926
SPCD	971106 (F&A)	SPCD F&A	4,535
CSG	527002 (0&G)	Administration	6,804
CSG	527003 (0&G)	Advancement	120,569
CSG	527004 (0&G)	Field Services	116,659

HARWOOD Museum of Art		Harwood Operating Statement			
		Fiscal Year 2024			
		As of June 30, 2024			
	FY24 Budget	FY24 Actuals (as of 6/30/24)	Actuals % of Budget	FY23 Actuals (as of 6/30/23)	FY23 to FY24 Actuals Variance
Beginning Reserve Balances					
Gift	117,341	649,358		604,111	45,227
Endowment	108,876	108,847		274,383	132,704
UNM Instruction and General	13,323	38,529		24,570	13,959
Operating	101,291	101,291		206,483	(105,192)
Accumulated Deficit	31,444	31,444		(31,444)	30,900
Total Beginning Reserves	382,275	1,168,652		1,178,083	58,789
Unrestricted Revenues					
Gifts					
Membership	100,000	92,879	93%	110,111	(17,232)
Admission	40,000	23,601	59%	31,083	11,602
Collection Care	25,000	2,824	10%	35,000	(32,476)
Curatorial	11,700	250	2%	1,800	(1,500)
Exhibitions	100,800	87,339	84%	21,795	45,343
Education	100,000	102,286	102%	111,677	(8,791)
Public Programs	35,000	35,000	100%	17,700	17,300
Centerpiece Fund	50,000	6,800	1%	113,900	(107,900)
Fund Raising Fund	99,700	41,527	42%	47,388	(5,861)
Sub-total	479,800	372,486	78%	401,484	(28,978)
Endowments	103,900	137,485	132%	208,615	(27,830)
Deferred Endowments	12,000	14,048	117%	13,807	240
Total Gifts and Endowments	395,700	524,019	88%	618,526	(82,906)
Operating Revenues					
Museum Store	92,840	68,524	74%	100,442	(31,928)
Admissions	79,700	61,224	77%	48,768	12,448
Programs	42,500	39,744	94%	29,307	10,437
Education	6,900	3,352	49%	4,710	(1,358)
Curatorial	-	108	0%	53	55
Other Sales and Revenue	-	35,121	0%	22,882	12,239
Total Operating Revenues	218,940	206,384	94%	225,942	(18,698)
UNM Instructional and General Revenues					
Museum Admin & Operations	279,323	259,895	93%	246,762	33,133
Museum Maintenance	170,117	176,117	100%	154,897	15,420
Museum Programs & Education	42,984	30,338	71%	50,752	(20,948)
Museum Curatorial & Collections	152,412	132,012	87%	151,610	49,802
Total Instructional and General	645,846	594,362	92%	553,001	56,961
Total Unrestricted Revenues	1,437,046	1,322,865	92%	1,378,489	(55,645)
Unrestricted Expenses					
Museum	116,493	185,406	140%	125,115	38,292
Museum Store	72,779	47,231	65%	94,318	(47,087)
Marketing and Memberships	91,523	61,358	67%	51,814	9,444
Education	48,516	38,578	79%	33,626	14,890
Programs	41,429	45,800	11%	44,574	(3,145)
Collections	43,000	40,367	94%	33,299	7,068
Curatorial	11,700	6,706	57%	5,382	1,348
Exhibitions	41,674	30,806	74%	30,804	(0,147)
Deferred Endowment Expenses	12,000	-	0%	-	12,000
Centerpiece Fund	112,492	53,935	48%	52,445	600
Other	-	-	0%	-	-
Total Operating Expenses	671,542	485,110	72%	533,506	(148,936)
UNM Instructional and General Expenses					
Museum Administration	881,544	441,544	50%	296,150	145,014
Museum Maintenance	279,152	249,331	89%	212,093	37,036
Museum Programs & Education	184,213	132,382	72%	148,507	4,874
Museum Curatorial & Collections	209,704	249,148	119%	173,461	75,686
Total Instructional and General Expenses	1,554,613	1,072,405	69%	830,211	262,210
Total Unrestricted Expenses	1,369,233	1,377,751	89%	1,343,726	24,527
Net Unrestricted Income	(32,187)	(54,886)		14,789	(69,675)

Team Expenses **Team Operating** Team Embellishments Events Management Game Expenses Athletic Functions Athletics Financial Summary NCAA Report

Team Operating Reports

Team: **Football**

Report Period: **Single Month**

Fiscal Year: **2025** Fiscal Period: **01**

Output Full Report

PDF HTML Excel

View Schedules Online via Excel

Download Report For Email

Current & Evolving Model

Standardized Infrastructure

Provides consistency, compliance, and scalability.

- Transaction processing
- Compliance oversight
- Standardized fiscal reporting framework

Flexible Service Delivery

Preserves responsiveness and unit identity.

- Unit-specific reporting tools
- Customized workflows where appropriate
- Embedded relationship management with departments

Results: Scalable Shared Services Model

FSSC demonstrates that shared services can scale efficiently without sacrificing service quality or departmental uniqueness.

FSSC Impact:

- 50 Service Agreements
- \$24M direct net savings since pilot
- \$3.1M annual recurring savings
- 87% staff retention over past 5 years

Case Study 2: Office of Institutional Analytics

Institutional Challenge

- Increasing interest/demand for data in decision-making conversations, along with increasing reporting requirements

At UNM this created several operational pressures:

- Budget reductions across academic units
- Difficulty hiring and retaining qualified data analytics staff
- **Unit-specific data analytics staff work in siloed environments**
- Inefficiencies and inconsistent practices in data pulls
- Limited use of data in decision making

Result

- Inconsistent reporting due to different definitions and operating procedures
- Departments felt data were inaccessible to them and were unable to use data in decision-making conversations.

Analytics Strategy

Initial Implementation:

Branch Campus Institutional Researcher located in our central Office of Institutional Analytics (OIA).

Leadership Expectations:

- Reduce inefficiencies by centralizing tasks that all 4 branch campuses are required to complete
- Improve accuracy and trust in data reported by utilizing centralized definitions and standards for frequently requested data sets (enrollment, retention, graduation, etc.)
- Demonstrate measurable cost savings
- Deliver improved data expertise and **service quality**

Analytics Outcomes

Key elements of the agreement included:

- Shared service agreement defining services and expectations
- Alignment with OIA best practices
- Ability for branches to retain customized processes when appropriate
- Dedicated institutional research contact
- Relationship-based service model (regular meetings, dedicated data request form).

Outcome

- Proved successful, granting expansion of the agreement

Analytics Outcomes (cont.)

Additional Outcomes

- **Improved data consistency**
 - Data Dictionary that is living (changes are made with community input)
 - Data Definitions and code for data pulls are shared transparently
- **Expanded reach without proportional staffing increases**
 - Now have agreements with the Health Science Center, the School of Engineering, and the Center for Teaching and Learning
- **Faster decision-making support**
 - One of the perks of centralizing has been the ability to easily create dashboards for each of these partners
 - This provides quick and easily accessible data at their fingertips, that can be reliably maintained and updated consistently
- **Greater collaboration around data**
 - No longer source of discomfort (at least not as much discomfort)
 - More strategic questioning – more interaction with the results

Synthesized Dashboards

The screenshot shows a web browser window with the URL `gallup.unm.edu/ir/facts-and-figures/faculty-and-staff-data.html`. The navigation menu includes: About-, Academics-, Admissions & Aid-, Campus Life-, News-, Students-, Faculty & Staff-, and Community-. The main heading is **Faculty and Staff Data**, with a sub-heading **UNM-G / Faculty and Staff Data**. A secondary navigation bar contains: Home, Facts and Figures -, Resources -, and Data Requests.

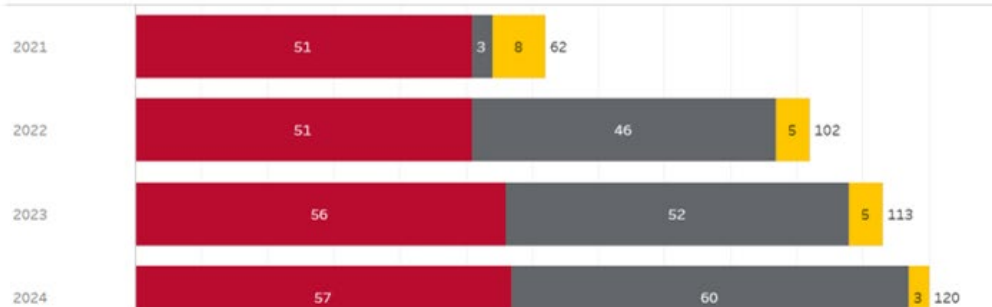
Gallup Faculty Dashboard



Full-time or Part-time
(All) ▾

Faculty Count by Year

Please click on a year and then select a campus, college, time status, and/or department to get more specific information.



Gender



Data Dictionary

Office of Institutional Analytics

[Home](#) [Facts and Figures ▾](#) [Data Requests ▾](#) [Resources ▾](#) [Surveys](#)

[UNM](#) / [Home](#) / [Resources](#) / [Data Dictionary](#)

Resources

[IPEDS Data Access](#)

[Faculty Salary Data](#)

[Useful Links](#)

[Rankings](#)

[About Us](#)

[OIA Newsletter](#)

[Data Dictionary](#)

Data Dictionary

The table below is UNM's central repository of terms and data field definitions that are shared across the campus. These data elements are used to define metrics, key performance indicators, and other institutional calculations. If you are unable to find an answer to a data element you are looking for, please [contact us](#).

Jump to: [A](#) | [B](#) | [C](#) | [D](#) | [E](#) | [F](#) | [G](#) | [H](#) | [I](#) | [J](#) | [K](#) | [L](#) | [M](#) | [N](#) | [O](#) | [P](#) | [Q](#) | [R](#) | [S](#) | [T](#) | [U](#) | [V](#) | [W](#) | [X](#) | [Y](#) | [Z](#)

Data Element	Definition	Links
Academic Year	Begins with the Summer term of one year and ends with the Spring term of the following year (e.g., Summer 2018-Spring 2019 is Academic Year 2018-19)	
Adjunct Faculty	Identifies a scholar whose primary place of employment is not UNM or whose primary employment within the University is not in a faculty capacity. An Adjunct Professor is an expert in a special field appointed to give instruction on a part-time or discontinuous basis.	
Aggregate Data	Summary data reported on by categories so that it is not possible to distinguish the properties of individuals within those categories (e.g., a count of students in a major).	
	Award category refers to the type of award a student receives following completion of their academic program. The programs offered at UNM include:	

Calendar of Reporting Deadlines

Office of Institutional Analytics

[Home](#) [Facts and Figures ▾](#) [Data Requests ▾](#) [Resources ▾](#) [Surveys](#)

[UNM](#) / [Home](#) / [Data Requests](#)

OIA Task Calendar

Spring Reporting

January

- NMHED Fall End of Semester Enrollment Files (all campuses)
- IPEDS Student Financial Aid Survey (all campuses)
- IPEDS GRS/GRS200 Surveys (all campuses)
- IPEDS Admissions Survey
- IPEDS Outcome Measures Survey (all campuses)
- IPEDS ACTS Survey (Albuquerque campus)
- IPEDS Cost II Survey (all campuses)
- AAUP Faculty Compensation Survey
- OSU Faculty and Graduate Assistant Salary Survey
- Title III/V Waiver Application
- Second Quarter New Mexico DFA Quarterly Reports

February

- [Spring Official Enrollment Report](#)
- Survey of Graduate Students and Post-doctorates in Science and Engineering (GSS) for the National Science Foundation (NSF) and the National Institutes of Health (NIH)
- [First-Year Cohort Tracking Dashboard](#) Spring Update
- ORD_FCTSEM_CUNM
- [Course Fail Rates](#) - Update with Fall data
- University Innovation Alliance Graduation Rates and Retention reporting

March

- Peterson's Undergraduate Survey
- ORD_NBT_CUNM
- HLC Annual Report (all campuses)
- NMHED Spring Census Reports (all campuses)

April

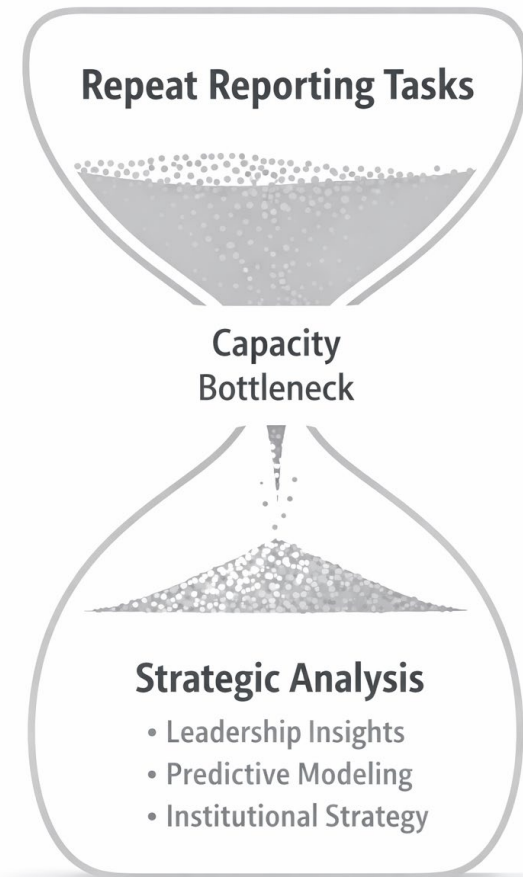
- IPEDS Human Resources Survey (all campuses)
- IPEDS Fall Enrollment Survey (all campuses)
- Third Quarter New Mexico DFA Quarterly Reports

May

- U.S. News Best Colleges Survey

Reflection Question

What percentage of your analytics team's time is spent on **repeat reporting** vs. **strategic analysis**?



Cross-Cutting Lessons

Lessons Learned from Shared Service Implementation

- Standardization enables scalability
- Technology multiplies institutional capacity
- Service quality **must remain central to the model**
- Shared services should preserve unit identity where possible
- Leadership alignment and culture shift are critical
- Shared services are not static—they evolve over time

Key Takeaways

Key Takeaways for Institutions

- Institutional capacity can grow even during fiscal constraints
- Shared services must balance **efficiency and service quality**
- Technology enables scalable service models
- Fiscal operations and analytics are strong starting points
- Continuous assessment is essential to long-term success

Questions and Discussion

Questions and Discussion

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