

# Annual Planning and Budgeting Cycle FY19-20

## January 2019

### University Planning Council

- Review Spring enrollment data
- Revise FY18-19 budget, if necessary
- Review President's presentation to legislature for FY19-20

### Board of Trustees Executive Committee

- Approve revisions to FY19-20 budget, if necessary
- Review president's presentation to legislature for FY19-20 and modify, as appropriate

## February 2019

### Faculty Budget Review and Planning Committee

- Review president's FY19-20 request to legislature
- Begin discussion of FY20-21 institutional needs
- Review *Strategic Plan* for FY20-21

### President

- Presentation of *FY19-20 Plan and Budget* to House Ways and Means Committee and Senate Finance Committee

### Council of Deans and Chairs

- Review president's presentation to legislature for FY19-20

## March 2019

### Student Government Association – Executive Council

- Discuss FY19-20 requests to legislature and formulate preliminary recommendations for FY20-21 budget

## April 2019

### **University Planning Council**

- Review Faculty Budget Review and Planning Committee recommendations
- Review finances of university (accounts, unallocated contingencies, reserves, development, and education foundation balances)

### **Council of Deans and Chairs**

- Discuss FY19-20 requests to legislature and formulate preliminary recommendations for FY20-21 budget

### **President and Provost**

- President and provost present *FY19-20 Plan and Budget* to faculty at spring forum

## May 2019

### **Faculty Budget Review and Planning Committee**

- Review legislature FY19-20 appropriations (finalized by mid-May)
- Assess implications to university plans, goals, and programs

### **Faculty Executive Committee**

- Review tuition recommendations
- Develop initial FY20-21 budget requests

### **Faculty Institutional Effectiveness Committee**

- Receive *Institutional Effectiveness Reports*
- Recommend adjustments to programs or budget allocations for FY19-20 based on *Institutional Effectiveness Reports*

### **University Planning Council**

- Review Faculty Budget Review and Planning Committee recommendations
- Assess implications to the university plans, goals, and programs
- Begin development of university *Accountability Report*
- Receive reports for programmatic accreditation reviews for existing year
- Review legislative FY19-20 appropriations

### **May 2019 (continued)**

- Review FY20-21 planning assumptions [e.g., expected growth; availability of FTEs; community activities and support (e.g., outreach to rural counties)]

#### **Board of Trustees Executive Committee**

- Consider FY20-21 planning assumptions
- Assess FY19-20 legislative appropriations impact
- Present recommendations for tuition modifications

### **June 2019**

#### **Faculty Institutional Effectiveness Committee**

- Review *Institutional Effectiveness Reports*

#### **Board of Trustees Executive Committee**

- Receive from the President a summary of *Institutional Effectiveness Reports*

#### **Board of Trustees Meeting**

- Consider FY20-21 planning assumptions
- Review tuition modification recommendations
- Establish FY19-20 tuition
- Approve FY19-20 budget

### **July 2019**

#### **University Planning Council Retreat (One day)**

- Review FY18-19 *Institutional Effectiveness Reports*
- Consider *Strategic Plan / Mission* modifications
- Consider *Facilities Master Plan* modifications
- Develop draft agenda for August Board of Trustees Meeting and Retreat

#### **Council of Deans and Chairs**

- Review FY18-19 Institutional Effectiveness Reports
- Consider *Strategic Plan / Mission* modifications

## August 2019

### **Board of Trustees**

#### Meeting and Retreat

- Review university programs, activities, and events of FY18-19
- Review and consider proposed FY19-20 programs, activities, and events
- Review, consider, and recommend plan modifications for the next three years
- Review and consider president's legislative budget request for FY20-21
- Review university *Accountability Report*

### **President**

- Presents the State of University speech to faculty and community
  - Report on financial health of university
  - University milestones from FY18-19
  - Major programmatic initiatives for FY19-20
  - Discussion of progress realized in achieving planning goals and objectives

## September 2019

### **Student Government Association Executive Committee**

- Discuss FY19-20 Budget
- Recommendations for FY20-21 appropriations requests

### **Faculty Budget Review and Planning Committee**

- Discuss FY19-20 Budget
- Recommendations for FY20-21 appropriations requests

### **University Planning Council**

- Finalize FY20-21 appropriations request to Governor

### **Faculty Institutional Effectiveness Committee**

- Provide institutional effectiveness guidance and recommendations to university planning council for FY19-20
- Review *Institutional Effectiveness Reports*

## **October 2019**

### **Academic Affairs Committee**

- Review/modify/approve report from director of institutional effectiveness on general education curriculum

### **University Planning Council**

- Review of Fall enrollment data
- Development of recommendations to FY19-20 budget allocations, if necessary, based on enrollment data

### **Council of Deans and Chairs**

- Discuss report on general education curriculum
- Consider Fall enrollment data
- Consider recommended adjustments to FY19-20 budget, if necessary

### **President**

- President presents FY20-21 *Strategic Plan* and budget to Governor and staff

### **Board of Trustees Executive Committee**

- Review Fall enrollment data
- Approve/modify recommendations for adjustments to FY19-20 budget

## **November 2019**

### **Board of Trustees**

#### Meeting

- Review of University financial data
- Revisions to FY19-20 Budget, if necessary
- Revise plans and programs, as appropriate

## **December 2019**

### **University Planning Council**

- Review *Strategic Plan*

## **December 2019 (continued)**

- Modify planning objectives, as necessary
- Review 2<sup>nd</sup> semester programs and recommend adjustments/revisions, as necessary

## **January 2020**

### **University Planning Council**

- Consider Spring enrollment data
- Consider recommendations to FY19-20 budget, if necessary

### **Board of Trustees Executive Committee**

- Review Spring enrollment data
- Revise FY19-20 budget, if necessary
- Review President's Presentation to Legislature for FY20-21

## **February 2020**

### **Faculty Budget Review and Planning Committee**

- Review president's FY19-20 request to legislature
- Begin discussion of FY20-21 institutional needs
- Review *Strategic Plan* for FY20-21

### **President**

- Presentation of *FY20-21 Plan and Budget* to House Ways and Means Committee and Senate Finance Committee

### **Board of Trustees**

- Review university financial data
- Revise FY20-21 budget, if necessary
- Revise plans and programs, as appropriate

### **Council of Deans and Chairs**

- Review president's presentation to legislature for FY19-20