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 2nd 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