

UHD Planning and Budget Development Overview, Guidelines, and Process

Overview

As President Muñoz indicated in his letter/directive, **the FY2019 plan and budget must support the goals established in the UHD Strategic Plan and must move the University toward meeting or exceeding the performance targets reflected in the UHD Progress Card.**

In order to be realistic in our planning and budgeting efforts, it is useful to consider the resources that are expected to be available for the coming year:

- We are entering the second year of biennium, so we know how much UHD will be receiving in general revenue support – essentially the same as what was provided for FY2018.
- Undergraduate enrollments have under-performed in the years since FTIC and Transfer admission standards were put in place. Graduate level enrollments have fortunately over-performed during this same period, but are now leveling off. Growing enrollments across the university, at all levels, will be critical to generating new resources for FY2019.
- Whether there will be tuition/fee increases for FY2019 remains uncertain. This matter will likely be considered by the UHS Board of Regents in spring 2018. With the understandable concerns about the increasing levels of student debt, any increases approved by the Board are expected to be modest.
- To fund new base initiatives, much of the money is going to have to come from the reallocation of existing base dollars and greater operational efficiency. To this end, **the president has directed that all units reduce their operating budgets by 2 percent.** The funds captured through this reduction exercise will be redirected to support new initiatives that support enrollment growth.

The documents central to the Planning and Budget Development process can be found at: <https://www.uhd.edu/administration/budget-procurement/Pages/budget-and-procurement-BudgetDevelopment.aspx>

Guidelines

Budget Reduction Form(s): Each unit is required to provide a plan for reducing its operating budget by 2 percent. Specific information on the budgets subject to the 2 percent reduction will be provided by the respective Division Business Administrator.

Unit Plan Narrative: At the College and business unit level, Deans and unit heads will need to provide a *Unit Plan Narrative*. This narrative should provide a high level summary of the initiative requests being submitted for FY2019, with a focus on how the proposed new initiatives support **UHD's mission, vision, and goals** and how they will bring about improvement on key metrics reflected on the **UHD Progress Card**. A single *Unit Plan Summary* template for both Academic/Student Affairs and Administrative units is available on the website.

Initiative Request Form(s): Each specific request for funding to support a new initiative (or expand a current activity) must be submitted on an *Initiative Request Form*. There are two such forms, one for Academic/Student Affairs units and another for Administrative units. Both forms have multiple tabs.

- If a unit is planning to self-fund any one-time initiatives from their existing fund balances this should be noted on an *Initiative Request Form*.

Plan/Budget Development Calendars: Because there are varying organizational structures across the divisions of the university, there is a need to work from two calendars, one for Academic/Student Affairs and another for Administrative units. The calendars are synchronized at the beginning and end, but deviate in the middle. The respective calendars are posted on the website.

Process

- The VPs will kick off the Planning and Budget process with a Look-Back Exercise for funds allocated for the last completed fiscal year, FY2017.
- Proposed FY2019 initiatives will be prioritized at every level.
- Deans and unit heads will propose realistic lists of priorities that reflect projected resources.
- Each VP will present their divisional plan to the Planning and Budget Development Committee for consideration.
- Based on the feedback, the VPs will combine all the items from the divisional plans into a single ranked list and put forth a recommendation to PBDC.
- Once finalized, PBDC will send the FY2019 Plan and Budget to the President for review.