

Kempner, Brandon K

From: Quintana, Wendy
Sent: Tuesday, August 15, 2017 9:13 AM
Subject: IMPORTANT: Global from VP for Finance & Admin. - Budget Process Timelines, Priorities, and Budget Template
Attachments: Budget Process Flow.pdf; President Minner's 2019 Priorities.pdf; Strategic Planning Group Priorities.pdf; Budget Template FY19.xlsx
Importance: High

ON BEHALF OF MAX BACA:

Good Morning,

It's that wonderful time of year again regarding preparation of your budgets requests for FY19. Please be sure to review all the attachments and if you have any questions, please feel free to contact our office or attend the listening sessions.

Attached are the following:

1. Budget Process Timelines
2. President Minner's 2019 Priorities
3. Strategic Planning Group FY19 Priorities Provided by Provost Gonzales
4. Budget Template

Please use the attached Budget Template when submitting your budgets for 2019. **The Budgets are due to the respective deans and vice presidents on 10/6/17. Final Budgets are due in the VPFA's Office on October 13, 2017.**

NOTE: Please refrain from creating your own budget template because this creates additional work on the administration's part.

When submitting your budget in **Excel (no PDFs)** to the dean or vice president, use the following file naming convention:

Format: Department Abbreviation-Organization-Date-By (Example: ITS-28000-8-8-17-JoeGieri)

Should you need to make revisions to the original submission, please indicate after the person submitting the

[Important Update] Modification to Budget Cycle FY19 Budget Requests and Prioritizations Process

After the first year of the budget cycle, it became obvious that more conversation needs to take place between the academic departments and the Deans, or the unit and their respective VPs. Because the Deans, Provost, and VPs are responsible for the prioritization presented to the Executive Management Team and President, there needs to be adequate discussion and chance for input to the prioritization. To facilitate this process in 2017-2018, the following steps will be implemented, replacing the hearing with the Budget Officer and VPFA feedback step.

- All Deans or VPs are to provide explicit feedback, including but not limited to their list of prioritizations, to the departments chairs and/or unit heads. This feedback shall be in written form to the chair/unit head.
- The Deans and VPs will hold with a meeting with chair/heads of their respective units to discuss their prioritization list.
- The chair/head may appeal a prioritization to the Provost or appropriate VP by providing a written explanation, with the introduction of new evidence not considered by the Dean, and with a indication of where they think their priority should appear on the Dean's list. The Provost or VP shall respond with a simple Yes or No to the appeal, following the process established last year.

Max Baca

Vice President for Finance and Administration