

Integrated Planning and Budget Process Key

Timeline:

Date	Action Items
July 1	Start of fiscal year. SPCT begins to establish strategic priorities for the following fiscal year that reflect assessment and budget.
July 15	All applications for faculty and/or renewable staff searches are due to DOF.
July 31	Decisions on faculty and long term adjunct approvals are provided to Department Chairs.
August – Welcome Week	During Welcome Week, the UW System and UW-Superior priorities are presented. Faculty or long term adjunct search decisions communicated to departments.
September 15	Annual reports are due to Chancellor’s Staff. Reports are available online to SPCT, PBC, and Governance bodies if they choose to review.
October 15	Planning and budget requests are due to Chancellor’s Staff for the following fiscal year. Requests are made available to SPCT, PBC, and Governance bodies for review.
October/ November	Chancellor’s Staff reviews all Annual Reports and Planning & Budget Requests. SPCT identifies budget FY priorities based on the Strategic Plan and makes recommendations to the Chancellor. PBC identifies academic budget FY priorities based on the Academic Plan and makes recommendations to Faculty Senate.
December –First Week	Chancellor’s Staff provides executive summary and makes funding recommendations and are posted to the website for campus review.
January 31	After review, SPCT and Governance bodies can suggest modifications to the Chancellor.
February	Segregated fee budget recommendations are forwarded to the Chancellor by SGA.
March	Chancellor’s budget finalized and submitted to UW System.
April	Final budget decisions posted to the website. Call is released for faculty or long term adjunct searches.
June	Academic Department Chairs submit faculty and long term adjunct position requests. Previous October budget requests will be factored into the decision making. Integrated planning & budgeting training is offered to campus staff, along with review of WISDM application.

Definitions:

Annual Reports: Reports that are written to summarize the prior year's activities, successes and shortcomings. Templates are provided to reporting units.

Assessment: "Assessment is the [ongoing] systematic collection, review, and use of information about educational programs undertaken for the purpose of improving student learning and development" (Palomba & Banta, 1999).

BOR: Board of Regents

Chancellor's Staff: Chancellor's staff includes the Provost, Dean of Students, Athletic Director, VC- Enrollment Management, VC- University Advancement, VC-Administration & Finance, Director of Marketing & Communications, and the Assistant to the Chancellor.

CIPT: Continuous Improvement and Planning Team.

EBG: Executive Budget Group

FY: Fiscal Year - Financial cycle for campus business. Begins July 1 of each year and ends June 30. The fiscal year number correlates to the ending 6 months. Ex. FY15 ends June 30, 2015.

Governance bodies: For review purpose, the following year budget allocations will be made available for review by Faculty Senate, Academic Staff Senate, Student Government Association and the Classified/University Staff Senate.

PBC: The Planning and Budgetary Council, which is an elected Council of the Faculty Senate. They are advisory to the Faculty Senate on planning and budgetary matters.

Planning and Budget Requests: Requests that are submitted from academic and non-academic departments. These requests include and are based upon the longer-term plan for that unit. Budget requests focus on appropriate activities for the following fiscal year. These requests are directly associated with the planned activities, services, and initiatives within that department/program. Templates are provided to reporting units.

SGA: Student Government Association

SPCT: Strategic Planning Core Team. The Executive Budget Group no longer exists per the Strategic Plan. As of 7/1/2014 the SPCT now functions as the combined CIPT and Executive Budget Group.