

UHD Planning and Budget Development Overview, Guidelines, and Process

Overview

As President Olivas indicated in his recent message, the FY2018 plan and budget will be grounded in the **priorities of student success, student access, community engagement, and faculty/staff support.**

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 know the following:

- We are entering a new biennium, so additional general revenue support is a possibility. The state economy has cooled from where it was two years ago, due to a marked slowdown in the energy sector, but overall the Texas economy remains healthy.
- While undergraduate SCHs are below projection for the current base period, the mix of hours is more favorable, with an increasing number Masters-level hours. This should help UHD secure additional state formula dollars, dependent upon what the state makes available.
- Tuition/fee increases for FY2018 will be a bit more modest than what was experienced for FY2017, but this will be a source of some new revenue.
- To fund new base initiatives, much of the money is going to have to come from reallocation of existing base dollars and greater operational efficiency.
- Some one-time initiatives may be funded from reserves/balances.

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

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 FY2018, 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, FY2016.
- Proposed FY2018 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 Plan and Budget to the President.