

# University of Pittsburgh at Bradford

## Timeline for Planning and Budgeting Process

### September

- President sends request to search for faculty to Oakland.
- President reviews institutional budget with campus during remarks at Opening Convocation.
- President and Vice President for Business Affairs review institutional budget in detail with Planning and Budgeting Committee at monthly meeting. Presentation includes summary of budgetary and programmatic outlay for the University's major operational units, as well as a summary of allocation of any new funds to new strategic initiatives or reallocation of funds in case of significant budget cuts.



### October

- Division Chairs and Program Directors present results of academic program reviews to PBC.
- PBC considers recommendations contained in reviews for inclusion in strategic plan.



### November

- Chair of PBC makes strategic plan annual update available for committee to review and asks President to attend to address questions and hear concerns.



### December

- PBC prioritizes list of strategic initiatives considered in the fall term. List should include a category for initiatives which PBC voted not to recommend for inclusion in strategic plan.
- Chair of PBC submits list to President.



### January

- President discusses Provost's instructions for Annual Planning document with PBC and seeks input on approaches President should consider in framing response.
- President asks administrative and academic units to report any unforeseen budget needs to President through their respective senior administrator. These needs should reflect unbudgeted increases in operating costs needed to sustain current activities (and not new programs which should be introduced as strategic initiatives).



### **February**

- President submits draft of Annual Planning document to PBC for review and comment.



### **March**

- President submits Annual Planning document to Provost.



### **March/April**

- PBC prioritizes faculty position list.
- PBC prioritizes staff position list.
- PBC prioritizes list of strategic initiatives considered in the spring term. List should also include a category for initiatives which PBC did not accept and endorse.
- Chair of PBC submits lists to President.



### **May**

- Chair of PBC submits report to President which summarizes actions of the PBC committee during the academic year.
- At the discretion of the President, PBC will be convened to discuss President's response to recommendations of the committee.
- President asks Cabinet, President of Faculty Senate and President of Staff Association to work with their constituents to gather information on progress in implementing strategic initiatives in the respective areas, as well as opportunities and challenges, in preparation for summer meeting.



### **June, July, August**

- President collaborates with Office of Business Affairs in preparation of institutional budget upon receipt of target letter from Oakland.
- Cabinet members recommend faculty and staff compensation adjustments to President based on established maintenance and merit ranges and recommendations from supervisors, faculty chairs and directors.
- President convenes summer meeting, including Cabinet, President of Faculty Senate, and President of Staff Association, to review progress in implementing strategic plan.