

University Planning and Budget Committee

Annual Report 2022 – 2023

To: Faculty Senate

From: University Planning and Budget Committee

Date: April 28, 2023

Members: Alicia Bray (Biology; Chair), Kathy Martin (Biomolecular Sciences; Vice Chair), James Whittemore (Registrar; Secretary), Carlos Liard-Muriente (Economics), A. Fiona Pearson (Sociology), Drew Harris (Management & Organization; 2022), Joseph Farhat (Finance; 2023), Elisabeta Pana (Finance), Yvonne O. Patterson (Social Work), Wesley Henry (Educational Leadership & Instructional Technology Jan – April 2023), Jason Hegenauer (Manufacturing and Construction Management), Mohsen Tadi (Engineering), Amy Kullgren (Information Technology), Sarah Petras (Information Technology), Kathy Poirier (Student Center), Laurie Walter (Nursing), Erin-Leigh Beecher (Academic Affairs)

General observations of the UPBC:

- Given the current challenges facing CCSU (and all institutions of higher education), the UPBC has an increasingly critical role in planning and budgetary matters.
- Given the complexity of the duties of the UPBC, we recommend having funding and training available for UPBC members who want to attend workshops on planning and budgetary topics. Training from in-house expertise for new members of the committee would also be helpful.
- We would suggest the Faculty Senate reassess the delegation of responsibilities and communication between committees to ensure the shared governance runs efficiently. There seems to be considerable overlap of responsibilities from multiple committees with the UPBC. For example, the "Strategic planning committees" website includes the Steering Committee, the UPBC, and the Work Group Members; however, it is our impression that the majority of strategic planning happens at the steering committee level and the UPBC has limited involvement. The Facilities Planning Council performs the bulk of the "planning" portion of the UPBC mission.
- We encourage the Faculty Senate to work with the UPBC to increase participation from the campus community on providing input on the planning and budget process.

This below is a summary of the accomplishments of the University Planning and Budget Committee for the academic year of 2022-2023. The committee met bi-weekly, mostly on the first and third Tuesday of the month, with additional meetings and communications needed during the process of budget review. Full detail of agendas and minutes are available at <https://web.ccsu.edu/UPBC/meetings/default.asp>

Accomplishments include, but are not limited to:

- Evaluated and worked through requests from Faculty Senate pertaining to graphical representation of costs and revenue by divisions, and the Athletics budget in Fall 2022
- Worked extensively to develop an updated CCSU leadership organizational chart; finalized with the help of Dr. Kostelis in December 2022
- Reviewed and approved concept papers for proposed new programs. Those concept papers moved forward to the Integrative Planning Council (IPC)
- Collaborated with ex-officio committee members on ascertaining current financial and non-financial challenges, as reflected by strategies deployed in the area of enrollment and retention
- Reviewed fiscal year 2024 new money budget proposal requests in January and February, met with Division heads in March, and conducted final deliberations in April. Voting members of the committee submitted written recommendations on each new money budget request to the President.
 - Our committee made one update to the budget process by sending a reminder to the university list-serv the open comment period was available with the link. From that, we received two comments which we incorporated in our deliberations.