

University Planning and Budget Committee

Annual Report 2023 – 2024

To: Faculty Senate

From: University Planning and Budget Committee

Date: 16 April 2024

Members: Alicia Bray (Biology; Chair), Jeremiah Jarrett (Biology; Vice Chair), James Whittemore (Registrar; Secretary), Oluwatoyin Awoderu (CIE and African Studies), Amber Cheema (Director, Student Health Services), Joseph Farhat (Finance), Amy Kullgren (Information Technology), Carlos Liard-Muriente (Economics), Kathy Martin (Biomolecular Sciences), Yvonne O. Patterson (Social Work), A. Fiona Pearson (Sociology), Mohsen Tadi (Engineering), Laurie Walter (Nursing), Sonja Koni (Undergraduate Student Representative), Samantha Seamans (English)

General observations of the UPBC:

- Although CCSU has a stable budget for the current fiscal year, there will be challenges facing the university in upcoming years (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.
- Clarity and support with the Faculty Senate to focus the missions of the Faculty Senate Standing Committees. There seems to be overlap of responsibilities from multiple committees with the UPBC. For example, the "Strategic planning committees" website include the Steering Committee, the UPBC, and the Work Group Members; however, it is our impression that the majority of strategic planning happens at the Faculty Senate Steering Committee level and the UPBC has limited involvement.
- Improved coordination with administration committees that overlap missions with the UPBC (ex. Facilities Planning Committee, Integrative Planning Council, and Enrollment Management Council)
- 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.

Below is a summary of the accomplishments of the University Planning and Budget Committee for the academic year of 2023-2024. 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://www.ccsu.edu/university-planning-and-budget-committee/upbc-2023-2024-meeting-dates>

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.
- Hosted Dr. Toro twice during the academic year; first in the Fall 2023 to receive update on fiscal situation; and again in January 2024 to be briefed on restructuring of Office of Equity and Inclusion.
- Advised Dr. Toro and Dr. Kostelis regarding 12 priorities developed by the academic divisions for the Academic Planning Program Process.
- 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.
- Initiated 3-year review of the 10-year Action Plan; IPC determined to develop review strategy.
- Updated bylaws and submitted to Faculty Senate for consideration.
 - Worked with Faculty Senate Steering Committee on duties and responsibilities.
- Reviewed fiscal year 2025 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 maintained the reminder to the university list-serv the open comment period was available with the link. We did not receive any comments this year.
- Requested and received head count by union from Lisa Bucher, information helpful for evaluation of future positions.
- Continued to work with Dr. Kostelis to maintain an updated CCSU leadership organizational chart.