



**Integrated BFA Planning & Budgeting Process - SCHEDULE**

DRAFT 10/7/15 REV 26

**Dates Process Plan Development - Through Monday, 10/13/2014**

- ✓ 9/19/2014 Draft division process plan to Rich
- ✓ 9/23/2014 Provost - Council of Deans
- ✓ 10/3/2014 Send draft division process plan to BFA Leadership Team
- ✓ 10/6/2014 BFA Leadership Team feedback on draft division process plan, and provides departmental plans for environmental scan and SCOT Assessment to Rich and Paul
- ✓ 10/8/2014 **BFA Leadership Team meeting** - Finalize draft division process plan
- ✓ 10/9/2014 Send draft division process plan to BFA Management Team
- ✓ 10/13/2014 **BFA Management Team meeting** - Draft division process plan presented and comments/feedback sought

**Dates Environmental Scan - Through Friday, 10/31/2014**

**Within BFA:**

*Note: Attended by VP, and appropriate AVPs and directors*

- ✓ 10/29/2014 FM Town Hall, 11 a.m.- Noon, AIC-West 210
- ✓ 10/29/2014 EHS, FD&CB, PS Town Hall, 2-3 p.m., BH 105
- ✓ 10/30/2014 32nd Street Town Hall, 11 a.m.-Noon, AC 130A
- ✓ 10/31/2014 OM Town Hall (Budget Office, HR, AVP Unit), 10-11 a.m., OM 340

**Beyond BFA:**

*Note: Attended by VP, Paul and one AVP or director*

- ✓ 10/1/2014 Fairhaven - Dean, Operations Manager (11-11:45 a.m.) (45 min)
- ✓ 10/8/2014 Vice Provosts, Grad School, RSP (2:00-3:00pm) (60 min)
- ✓ 10/8/2014 ESS - SVP and Directors (8:15-9:30am) (90 min)
- ✓ 10/15/2014 AS Board regular meeting (5:30-6:15 p.m.)
- ✓ 10/16/2014 CSE - Dean, Chairs, Operations Manager (8:30-9:15 a.m.) (45 min)
- ✓ 10/20/2014 Huxley - Dean, Chairs, Operations Manager (3-3:45 p.m.) (45 min)
- ✓ 10/22/2014 Library Council (9-9:45 a.m.) (45 min)
- ✓ 10/29/2014 CBE - Dean, Chairs, Operations Manager (10-10:30 a.m.) (30 min)
- ✓ 10/30/2014 CHSS - Dean, Chairs, Operations Manager (8:45-9:30 a.m.) (45 min)
- ✓ 10/30/2014 CFPA - Dean, Chairs, Operations Manager (4-4:45 p.m.) (45 min)
- ✓ 10/31/2014 UA & URCD - VPs' Swan & Bowers invitation (8:15-9:00 a.m.) (45 min)
- ✓ 11/25/2014 Woodring - Dean, Chairs, Operations Manager (2:00-2:45 p.m.) (45 min)

**Dates SCOT Assessment and Mission, Vision & Strategic Objectives - Through Wednesday, 2/4/2015**

- ✓ 11/4/2014 Rich and Paul revise division SCOT Assessment utilizing departmental SCOTs and listening sessions for BFA Leadership Team consideration
- ✓ 11/5/2014 Send revised SCOT Assessment to BFA Leadership Team for their review
- ✓ 11/10/2014 BFA Leadership Team feedback on **both** division SCOT Assessment and Mission, Vision & Strategic Objectives due to Rich and Paul
- ✓ 11/12/2014 Rich and Paul revise division SCOT Assessment and Mission, Vision & Strategic Objectives utilizing departmental feedback
- ✓ 11/13/2014 Send revised division SCOT Assessment and Mission, Vision & Strategic Objectives to BFA Leadership Team for their review
- ✓ 11/18/2014 BFA Leadership Team feedback on division SCOT Assessment and Mission, Vision & Strategic Objectives due to Rich and Paul
- ✓ 11/19/2014 Rich and Paul revise division SCOT Assessment and Mission, Vision & Strategic Objectives utilizing leadership feedback
- ✓ 11/20/2014 (half day - Lakewood) **BFA Leadership Team meeting** - Builds SCOT Assessment and Mission, Vision & Strategic Objectives. Discuss department plans for developing 6 -Year Plans and Initiatives.
- ✓ 11/21/2014 Post draft SCOT Assessment and Mission, Vision & Strategic Objectives online and invite University community feedback, and copies sent to Provost's Office (Brian Burton)

**BFA AVPs & directors and their depts:**

Note: During the Town Halls and various meetings, each BFA AVP and director should have:

1. Their current SCOT, Mission Vision & Strategic Objectives, and Six-Year Plans available.
2. **Process plan** for their department's environmental scan and development of SCOT Assessment. Plans **DUE on or before 10/6/2014** to Rich and Paul.

10/15/2014

**During this period:** Each BFA AVP and director conducts a departmental environmental scan and develops a department **SCOT Assessment** and draft SCOT **DUE on or before 10/31/2014** to Rich and Paul

**Expectations during process:**

1. Actively engage staff.
2. Communicate back to staff what was heard.
3. Share with other departments to analyze relationships between them.

10/31/2014

**During this period:** Each BFA AVP and director meets with their staff to review the division's current **Mission, Vision & Strategic Objectives** and compile departmental feedback **DUE on or before 11/9/2014** to Rich and Paul.

Same expectations as above.

11/9/2014

**Definitions:**

**BFA Leadership Team** is BFA's VP and direct reports

**BFA Management Team** is BFA's VP and direct reports, plus assistant directors managers with 5 or more employees

- ✓ 12/9/2014 **BFA Management Team meeting** - Review of division SCOT Assessment, Mission, Vision & Strategic Objectives, and discuss department plans for developing Six-Year Plan and Initiatives
- ✓ 2/4/2015 **UPRC Meeting** - Review of draft division SCOT Assessment and Mission, Vision & Strategic Objectives.

12/3/2014  
↓  
1/30/2015

During this period: Each BFA AVP and director meets with their staff to develop a department **Six-Year Plan and Initiatives** utilizing division SCOT Assessment and Mission, Vision & Strategic Objectives, coordinates directly with collaborating departments, and plans **DUE on or before 1/30/2015** to Rich and Paul.

**Dates Six-Year Plan and Initiatives - Through Wednesday, 7/1/2015**

- ✓ 2/2/2015  
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2/6/2015  
Rich meets with each BFA AVP and Director:  
- Review their departmental Six-Year Plan and Initiatives  
- Begin to develop division Six-Year Plan and Initiatives utilizing division SCOT Assessment and Mission, Vision & Strategic Objectives, and department Six-Year Plans and Initiatives
- ✓ 2/9/2015 (half day) **BFA Leadership Team meeting:**  
- Utilizing UPRC feedback, finalizes division SCOT Assessment and Mission, Vision & Strategic Objectives  
- AVPs/directors present their own, departmental Six-Year Plan and Initiatives to the team
- ✓ 2/17/2015 Send draft division Six-Year Plan and Initiatives to BFA Leadership Team for their review
- ✓ 2/19/2015 (half day) **BFA Leadership Team meeting** - Builds division Six-Year Plan and Initiatives
- ✓ 2/20/2015 Post division Six-Year Plan and Initiatives online and invite University community feedback. Send copies to Provost's Office (Brian Burton).
- ✓ 2/20/2015 SCOT Assessment and Mission, Vision & Strategic Objectives published
- ✓ 3/4/2015 **UPRC Meeting** - Review of draft Six-Year Plan and Initiatives. BFA Leadership Team to attend.
- ✓ 3/5/2015 (half day) **BFA Management Team meeting** - Each AVP and Director presents their departmental Six-Year Plan and Initiatives, review division Six-Year Plan and Initiatives, and discuss budget processes.
- ✓ 3/10/2015 **BFA Leadership Team meeting:**  
- **Finalize division Six-Year Plan and Initiatives**  
- AVPs/directors present 2015-17 departmental budget proposals to team
- 6/15/2015 Rich and Paul finalize division Six-Year Plan and Initiatives and sends announcement to the division.
- 7/1/2015 Each AVP and Director works initiatives into annual goals and develops action plans as appropriate.

2/2/2015  
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3/2/2015

**Expectations during process:**  
1. Actively engage staff.  
2. Communicate back to staff what was heard.  
3. Share with other departments to analyze relationships between them.

During this period: Each BFA AVP and director will be working on their departmental **2015-17 Budget Proposals** utilizing department (and evolving division) Six-Year Plan and Initiatives, division SCOT Assessment and division Mission, Vision & Strategic Objectives. These are permanent and one-time requests that will feed into the University's 2015-17 Budget Allocation Process. Proposals **DUE on or before 3/2/2015** to Rich.

**3/10/2015 thru 6/30/2015:** During this period, each BFA AVP and director will be developing their action plans as appropriate for the division Six-Year Plan and Initiatives.

**Dates 2015-17 Budget Proposals - Through August 2015**

- ✓ 2/20/2015  
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2/27/2015  
Rich and Nicole meet with each BFA AVP and director regarding their 2015-17 departmental budget proposals
- ✓ 3/2/2015 Each BFA AVP and director submits 2015-17 departmental budget proposals to Rich
- ✓ 3/10/2015 **BFA Leadership Team meeting:**  
- Finalize division Six-Year Plan and Initiatives  
- **AVPs/directors present 2015-17 departmental budget proposals to team**
- ✓ 3/20/2015 **BFA Leadership Team meeting** - Draft 2015-17 Budget Proposals for submittal to Budget Office
- ✓ 3/25/2015 **BFA Management Team meeting** - Review of 2015-17 Budget Proposals to be submitted to Budget Office
- ✓ 3/25/2015 2015-17 Budget Proposals due to Budget Office
- ✓ 3/31/2015 2015-17 Budget Proposals posted on Budget Office website for comment until Apr 24. Establish link from BFA Planning website to Budget Office website.

3/2/2015

Definitions:

**BFA Leadership Team** is BFA's VP and direct reports

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✓ 4/8/2015 **UPRC Meeting** - 2015-17 Budget Proposal presentation by Rich, BFA AVPs and Directors

During this period:

Dates	Listening Session Responses
3/31/2015	Each BFA AVP and director submits listening session "Challenges" responses to Rich and Paul ✓
4/6/2015	Rich and Paul draft message(s) for listening session participants and sends to BFA AVPs and directors for their review ✓
4/15/2015	Paul posts listening session message(s) to BFA Planning website ✓
6/25/2015	Rich and Paul send listening session message(s) to listening session participants ✓

✓ 7/10/2015 2015-17 VP & Dean budget recommendations posted on Budget website for comment until July 15th. Establish link from BFA Planning website to Budget Office website.

✓ 7/16/2015 2015-17 President's budget recommendation mailed to BOT and posted on Budget website for comment.

✓ 7/20/2015 2015-17 Budget recommendation presented to BOT for preliminary approval and feedback

✓ July / August 2015 **BFA Leadership Team meetings, various dates:**  
Finalize 2015-17 Divisional Budgets utilizing BOT approved budget

✓ July / August 2015 Send out division-wide communication on budget and stratetgic plans

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