# Integrated BFA Planning & Budgeting Process - SCHEDULE

## Dates

### Process Plan Development - Through Monday, 10/13/2014

<table>
<thead>
<tr>
<th>Date</th>
<th>Task</th>
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<tbody>
<tr>
<td>9/19/2014</td>
<td>Draft division process plan to Rich</td>
</tr>
<tr>
<td>9/23/2014</td>
<td>Provost - Council of Deans</td>
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<tr>
<td>10/3/2014</td>
<td>Send draft division process plan to BFA Leadership Team</td>
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<tr>
<td>10/6/2014</td>
<td>BFA Leadership Team feedback on draft division process plan, and provides departmental plans for environmental scan and SCOT Assessment to Rich and Paul</td>
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<tr>
<td>10/8/2014</td>
<td><strong>BFA Leadership Team meeting</strong> - Finalize draft division process plan</td>
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<tr>
<td>10/9/2014</td>
<td>Send draft division process plan to BFA Management Team</td>
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<tr>
<td>10/13/2014</td>
<td><strong>BFA Management Team meeting</strong> - Draft division process plan presented and comments/feedback sought</td>
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### 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, F&C&B, 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 (11:11-11:45 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 (9:45 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 (4:45 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)

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

- Rich and Paul revise division SCOT Assessment utilizing departmental SCOTs and listing 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)

## 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

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*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.

*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.

*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.*
BFA Management Team meeting - Review of division SCOT Assessment, Mission, Vision & Strategic Objectives, and discuss department plans for developing Six-Year Plan and Initiatives

12/9/2014

UPRC Meeting - Review of draft division SCOT Assessment and Mission, Vision & Strategic Objectives.

2/4/2015

2/6/2015

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

2/9/2015 (half day)

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

2/20/2015

UPRC Meeting - Review of draft Six-Year Plan and Initiatives. BFA Leadership Team to attend.

2/5/2015

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

- Finalize division Six-Year Plan and Initiatives
- AVPs/directors present 2015-17 departmental budget proposals to team

3/15/2015

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.

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 3/30/2015 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.

4/10/2015 thru 6/30/2015: 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 3/30/2015 to Rich.

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

6/15/2015

Rich and Paul finalize division Six-Year Plan and Initiatives and sends announcement to the division.

Each AVP and Director will be developing their action plans as appropriate for the division Six-Year Plan and Initiatives.

During this period: Each BFA AVP and director will be developing their action plans as appropriate for the division Six-Year Plan and Initiatives.

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

During this period: Each BFA AVP and director will be working on their departmental 2015-17 Budget Proposals utilizing department and evolving department 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 3/30/2015 to Rich.

During this period: Each BFA AVP and director will be developing their action plans as appropriate for the division Six-Year Plan and Initiatives.

Rich and Nicole meet with each BFA AVP and director regarding their 2015-17 departmental budget proposals

2/20/2015

Rich and Nicole meet with each BFA AVP and director regarding their 2015-17 departmental budget proposals

2/27/2015

Each BFA AVP and director submits 2015-17 departmental budget proposals to Rich

3/2/2015

BFA Leadership Team meeting:
- Finalize division Six-Year Plan and Initiatives
- AVPs/directors present 2015-17 departmental budget proposals to team

3/10/2015

BFA Leadership Team meeting - Draft 2015-17 Budget Proposals for submittal to Budget Office

3/20/2015

BFA Management Team meeting - Review of 2015-17 Budget Proposals to be submitted to Budget Office

3/25/2015

2015-17 Budget Proposals posted on Budget Office website for comment until Apr 24. Establish link from BFA Planning website to Budget Office website.

3/31/2015
### UPRC Meeting - 2015-17 Budget Proposal Presentation by Rich, BFA AVPs and Directors

**During this period:**

<table>
<thead>
<tr>
<th>Dates</th>
<th>Listening Session Responses</th>
</tr>
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<tbody>
<tr>
<td>3/31/2015</td>
<td>Each BFA AVP and director submits listening session &quot;Challenges&quot; responses to Rich and Paul</td>
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<td></td>
<td>Rich and Paul draft message(s) for listening session participants and sends to BFA AVPs and directors for their review</td>
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<tr>
<td>4/6/2015</td>
<td>Paul posts listening session message(s) to BFA Planning website</td>
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<tr>
<td>4/15/2015</td>
<td>Rich and Paul send listening session message(s) to listening session participants</td>
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**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, dates TBA:**
Finalize 2015-17 Divisional Budgets utilizing BOT approved budget.

**July / August 2015**  
Send out division-wide communication on budget and strategic plans.

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