### Integrated BFA Planning & Budgeting Process - SCHEDULE

**DRAFT 10/7/15 REV 26**

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

<table>
<thead>
<tr>
<th>Date</th>
<th>Event Description</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>
</tr>
<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>
</tr>
<tr>
<td>10/8/2014</td>
<td>BFA Leadership Team meeting - Finalize draft division process plan</td>
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<tr>
<td>10/9/2014</td>
<td>Send draft division process plan to BFA Leadership Team</td>
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<tr>
<td>10/13/2014</td>
<td>BFA Management Team meeting - Draft division process plan presented and comments/feedback sought</td>
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#### Dates - Environmental Scan - Through Friday, 10/31/2014

**Within BFA:**
- 10/29/2014 - FM Town Hall, 11 a.m.- Noon, AIC-West 210
- 10/29/2014 - EHS, F&D, 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:**
- 10/1/2014 - Fairhaven - Dean, Operations Manager (11-11:45 a.m.) (45 min)
- 10/8/2014 - Vice Provosts, Grad School, RSP (2-3:30pm) (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 - VP's 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

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

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

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

**Dates**

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

- **2/2/2015** 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

- **2/6/2015** 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)** Send draft division Six-Year Plan and Initiatives to BFA Leadership Team for their review

- **2/17/2015** 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


- **3/5/2015 (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.

**Dates**

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

- **2/20/2015** 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.

**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
**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>
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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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<tr>
<td>4/6/2015</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>4/15/2015</td>
<td>Paul posts listening session message(s) to BFA Planning website</td>
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<tr>
<td>6/25/2015</td>
<td>Rich and Paul send listening session message(s) to listening session participants</td>
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- 4/8/2015
  - UPRC Meeting - 2015-17 Budget Proposal presentation by Rich, BFA AVPs and Directors

- 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 strategic plans

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- **BFA Management Team** is BFA’s VP and direct reports, plus assistant directors manages with 5 or more employees