

# DRAFT 10.10.18

## OUR GENERAL FUND STRATEGIC BUDGET PLANNING PROCESS: WHAT'S NEXT?

### Background

- The University adopted a General Fund Strategic Budget Planning Process in May 2017. A full background on the process is available at <https://www.mnsu.edu/planning/sbp.html>.
- Our General Fund Strategic Budget Planning Process provides a foundation of information to support decision-making that proactively aligns University resources to the strategic priorities and directions of the institution.
- The Final Categorization Phase concluded at the end of the 2017–2018 academic year. The final categorization of programs is published internally at [https://mnsu.sharepoint.com/acadaff/irpa/Documents/2017-18\\_SBP\\_Program\\_Outcomes.pdf](https://mnsu.sharepoint.com/acadaff/irpa/Documents/2017-18_SBP_Program_Outcomes.pdf)

### Final Categorization Summary (Institution-Wide)

Categorization / Outcome	Number of Programs
Candidate for Investment	42
Candidate for Maintenance	244
Candidate for Reduction	22
Department Identified Program to be Suspended	15
Department Identified Program to be Suspended/Redesigned	1
No Narrative Submitted for Strategic Budget Planning	9
No Outcome - New Program	30
Program Currently Suspended	6
<b>Grand Total</b>	<b>369</b>

### Moving Forward

- In accordance with the University's budget principle to make investments in the University even in times of reduced resources, the General Fund Strategic Budget Planning Process will be used as a resource in decisions to ensure funds are available for investment in the University.
- The final categorization outcomes will be used in conjunction with University, divisional, and unit strategic plans and directions, academic plans, and other planning documents to help prioritize the future allocation and/or reallocation of University general fund resources – salary and non-salary.
- The final categorization outcomes will be one source of information considered in alignment with established process for allocation of resources such as R&R, institutional equipment, technology, etc.
- Looking at the University's budget projections and the budget realities we are facing, stable or declining resources, general fund programmatic investments will require consideration of general fund programmatic reallocations.

### Strategic Budget Planning Process (Adopted May 2017)

The Strategic Budget Planning Process consists of four phases: data, initial categorization, final categorization, and process review and evaluation.

- During the *Process Review and Evaluation Phase*, the process and evaluation criteria and indicators used will be reviewed and updated as needed before the next cycle.

### Process Review and Evaluation Phase

- Establish Process Review and Evaluation Work Groups:
  - Overall Process Work Group
  - Academic Program Work Group
  - Non-Academic Program Work Group
- Work Group Members/Representatives:
  - Budget, Planning and Assessment & Evaluation Sub-Meet members that are currently serving or served as a part of the process development and/or implementation.
  - Bargaining units, administration, college deans and department chairs.
  - Subject matter experts as needed.

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Timeline	Actions	Communication/Consultation
<b>September</b>	Joint Budget, Planning and Assess. & Evaluation Sub-Meet: <ul style="list-style-type: none"> <li>• Recommend Process to Move Forward</li> </ul>	<ul style="list-style-type: none"> <li>• Joint Budget, Planning and Assessment &amp; Evaluation Sub-Meet (9/14/18)</li> </ul>
<b>October</b>	Process Review and Evaluation Work Group Meetings: <ul style="list-style-type: none"> <li>• Strategic Budget Planning Process Work Group</li> <li>• Academic Program Work Group</li> <li>• Non-Academic Program Work Group</li> </ul>	<ul style="list-style-type: none"> <li>• Meet and Confer Update</li> </ul>
<b>November</b>	Process Review and Evaluation Work Group Meetings: <ul style="list-style-type: none"> <li>• Strategic Budget Planning Process Work Group</li> <li>• Academic Program Work Group</li> <li>• Non-Academic Program Work Group</li> </ul>	<ul style="list-style-type: none"> <li>• Campus Open Forum(s)</li> <li>• Department Chairs and Directors Update</li> </ul>
<b>December</b>	Process Review and Evaluation Work Group Meetings: <ul style="list-style-type: none"> <li>• Strategic Budget Planning Process Work Group</li> <li>• Academic Program Work Group</li> <li>• Non-Academic Program Work Group</li> </ul>	
<b>January</b>	Process Review and Evaluation Work Group Meetings: <ul style="list-style-type: none"> <li>• Strategic Budget Planning Process Work Group</li> <li>• Academic Program Work Group</li> <li>• Non-Academic Program Work Group</li> </ul>	
<b>February</b>	Process Review and Evaluation Work Groups Submit Draft Revision Recommendations  Campus Review of and Feedback on Work Group Draft Recommendations	<ul style="list-style-type: none"> <li>• Online Posting of Draft Revisions for Campus Feedback</li> <li>• Meet and Confer Update</li> <li>• Department Chairs and Directors Update</li> </ul>
<b>March</b>	Continued Campus Review of and Feedback on Work Group Draft Recommendations  Process Review and Evaluation Work Group Meetings: <ul style="list-style-type: none"> <li>• Strategic Budget Planning Process Work Group</li> <li>• Academic Program Work Group</li> <li>• Non-Academic Program Work Group</li> </ul> Process Review and Evaluation Work Groups Review Feedback and Submit Revised Recommendations	<ul style="list-style-type: none"> <li>• Campus Open Forum(s)</li> </ul>
<b>April</b>	Joint Budget, Planning and Assessment & Evaluation Sub-Meet Review of Work Group Revision Recommendations  Process Review and Evaluation Work Groups Review Feedback and Submit Final Recommendations	<ul style="list-style-type: none"> <li>• Joint Budget, Planning and Assessment &amp; Evaluation Sub-Meet</li> <li>• Meet and Confer Consultation</li> <li>• Department Chairs and Directors Update</li> </ul>