MEMORANDUM

To: Rex Fuller, Provost & Vice President of Academic Affairs
   Mary Voves, Vice President for Business and Finance
   Stacey Morgan-Foster, Vice President of Student Affairs
   Michael Westfall, Vice President of Advancement
   Gary Pratt, Chief Information Officer
   Bill Chaves, Athletic Director

From: Rodolfo Arévalo, PhD
      President

Date: August 29, 2012


Eastern’s internal state and self-support budget planning period for the 2013-15 will be beginning soon. This past year the leadership team and campus community spent considerable time planning for the next four years through the strategic planning process culminating in the adoption of Inspiring the Future, the strategic plan for 2012-2017. This resulted in the following university-wide strategic goals and priorities for the next four years:

1. Student Success
2. Institution of Innovation
3. Community Engagement and Impact
4. Visibility

Operating within these priorities, Eastern begins university-wide participation in the budget planning process in October 2012. As part of any thorough and comprehensive budget process, we must proceed in a strategic manner to allocate the university’s current and future resources to optimally position Eastern for the future and the success of our students.

The 2013-15 budget planning process and timeline continues to move toward full implementation of the biennial budget model, with the consolidation of the self-support budget planning and state budget planning. Budget hearings with the President are incorporated into the timeline for the 2013-15 state and self-support budgets.

The budget recommendations for each unit for the stable funding level, any new investment requests, and the self-support budgets must be submitted to the budget planning center no later than December 14, 2012.

1. **Stable funding level in your state operating budget.** This budget plan requires each executive level to establish budget connections with the university strategic plan, to establish priorities within the unit, to justify expenditures and to prepare an assessment plan for accountability. Each budget manager should determine whether reallocation
within his/her area of responsibility is necessary to achieve the highest level of service to the university.

2. **New Investment Proposals.** Each budget manager can submit discrete proposals for additional funding for investments that will directly relate to achieving strategic goals in your units and the university. Requests for additional funding, staffing, new programs, etc., must be submitted via this process. Priority will be given to proposals that address the three priorities: student success, transforming the university, and community engagement and impact.

3. **Self-Support Budget Planning.** Units will plan budgets for each year of the 2013-15 biennium. Budget plans must be accompanied with clear goals and be inclusive of all position changes, new initiatives, and other budget needs (including but not limited to equipment replacement requests, technology implementations, and rate or fee increases) for the entire two-year period.

It is the goal of the university to engage all campus stakeholders in the budget process. Campus forums as well as opportunities for staff, faculty, students, and others to provide recommendations and suggestions will ensure budget recommendations are made in careful consideration of our diverse campus.

The following timeline will allow sufficient time for strategic budget planning prior to Board of Trustee approval of the 2013-15 budgets in June 2013.

**November/December 2012** – Units establish strategic goals in direct alignment with university priorities stated above. Unit budget planning for both state and self support funds completed and submitted to budget office. Accountability reports are completed and submitted.

**January 2013** – Budget Services review of budget plans and preparation of summary information as needed for the president.

**February 2013** – President’s review of both state support and self-support budget requests. Hearings held with division heads and deans to justify and support budget requests. Modifications of budget requests made as requested by the president.

**March 2013** – University Budget Committee (UBC) hearings and campus community hearings on proposed budget plans.

**April 2013** – Presidential decision on budgets made with consideration of UBC recommendations. President recommends 2013-15 budget to the Board of Trustees (BOT).


As in the 2013-15 biennial budget process, a secure web based budget planning center will be available to aid in submitting the various budget plans noted above. The budget planning center will provide prior and current year financial information, current and future year budget detail, as well as a variety of reports to assist you in estimating the cost of benefits, enrollment growth assumptions and the fiscal growth factor. A representative from Budget Services will contact your office to provide password access and an overview of the budget planning center as well as answer any questions. In addition to this website, each executive area may submit their budget proposals on the attached spreadsheet which is consistent with the model used to submit the statewide biennial operating budget proposal. This spreadsheet should be used for requests of additional funding only.

Thank you for your thoughtful process in preparing your budget requests for the upcoming biennium.

c:  
C. Goff 
L. Harty 
R. Dempsey 
E. Baker 
M. Graham 
D. Campitelli 
J. Crabb 
A. Skaer 
W. Carman 
C. Schumacher 
D. Ross 
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