

PSU Budget Planning Process Timeline

Revised November 30, 2006

Carol and Michael's working copy

Timeline	Steps needed for FY07-08 Budget	Data Gathering Timeline
OCT 2006		
Oct. 1-2	Fall Retreat with campus leadership on strategic clarification process	
Oct. 20	Fall Retreat 2	
Oct. 26	Initial consultation with campus leadership on Process & Timeline for (re)allocating resources	
NOV 2006		
<i>Election Day - November 7th</i>		
Nov. 1	Consultation w/ Budget Committee on review of last year's process and outcomes. Draft timeline shared.	
Nov. 21	Fall Retreat 3	
Nov. 22	4th week calculations for enrollment allocation adjustment	Faculty productivity survey distributed for data collection
Nov. 27	Roy and Lindsay draft memo to deans and the budget committee	
Nov. 29	Discuss budget process at CADs	
Nov. 30	Deans receive memo re: SCH projections	
DEC 2006		
Dec. 4	Deans and Admin. Directors receive Budget Context memo and Budget Instruction Memo	
first 1/2	Finalization of process by the Faculty Senate Budget Committee, deans and vice provosts, and the University Budget Team.	
Dec. 20		Preliminary Enrollment projections, including self-support for 2007-2008
second 1/2		Administrative support by Unit; Staff FTE per student; staff FTE per faculty
second 1/2		Funds generated by Units' SCH production; Expenditures by Unit: \$ per in-load SCH
Dec. 20		Productivity data for faculty (including survey data; SCH per faculty FTE at UG and G levels & external funding)
JAN 2007		
Jan. 11	Data distributed to deans, directors, and chairs	
Jan. 12	Faculty Symposium to clarify and test our Strategic Priorities with the campus community	Consider gathering additional data based on these priorities
second 1/2	Campus leadership engages faculty in discussions of priorities, analysis of data, and development of recommendations for budget allocations	

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FEB 2007		
first 1/2	4th week calculations for enrollment allocation adjustment	Re-examine enrollment projections
Feb. 9	Academic budget proposals are due to the Provost by noon on February 28th. Vice Presidents begin deliberations on budget options based on data gathered, recommendations by deans and directors and the forecast of next year's revenues.	
Feb. 16	Data consolidation and accuracy check by Budget Office staff. Budget book due to University Budget Team	
Feb. 19-20	Budget deliberation and draft proposal by the University Budget Team	
Feb. 22-23	Deans review draft proposal and submit proposed changes. Due by 5:00 on the 28th.	
Feb. 26-27	University Budget Team revises proposal based on input from deans and directors.	
MAR 2007		
Mar. 5	The vice presidents meet with the Faculty Senate Budget Committee to discuss budget recommendations	
Mar. 5	The vice presidents discuss budget recommendations with the Faculty Senate. President Bernstine attends discussion.	
Mar. 8	The President and Vice President hold an open forum to discuss the recommendations being considered by the Vice Presidents for recommendation to the President.	
Mar. 9	The President and Vice President hold a second open forum to discuss the recommendations being considered by the Vice Presidents for recommendation to the President.	
Mar. 16	Vice Presidents forward final recommendation to the President	
Mar. 23	The President reviews and approves budget	

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APR 2007	<p>Apr. 2 President communicates his final decisions to the Faculty Senate. Prior to the campus announcement, reduction details will be discussed with affected units.</p>	
MAY 2007	<p>first 1/2 Consultations begin with Deans/Budget Committee/FADM on new Budget Allocation Model (BAM) for 08-09</p> <p>second 1/2</p>	
JUN 2007	<p>first 1/2 Settle-up settle-down allocations distributed</p> <p>second 1/2</p>	
JUL 2007	<p>first 1/2</p> <p>second 1/2</p>	
AUG 2007	<p>first 1/2</p> <p>second 1/2</p>	
SEP 2007	<p>first 1/2 State Funding finalization</p> <p>second 1/2</p>	
OCT 2007	<p>first 1/2</p> <p>second 1/2 Fall 4th week enrollment data available</p>	
NOV 2007	<p>first 1/2 Final Budget Adjustments</p> <p>second 1/2 Internal budget adjustment</p>	