WCU 2014-15 UNIVERSITY BUDGET REQUEST INSTRUCTIONS & PROCESS

All budget requests for College/Department and Divisional Hearings will be posted to the website budgetprocess.wcu.edu as requests are received.

ACADEMIC AFFAIRS DIVISION

- **Requests**: Budget requests will align with the 20/20 Vision. Requesters will submit recurring and one-time budget requests on electronic templates to the college Dean/Associate Vice Chancellor/Provost as appropriate. Requests will address outcomes from any program prioritization, and/or program, administrative, and accreditation reviews in the request justification.
  - **One-Time Budget Requests** *(Forms 1 and 2)* – each request must be listed in priority order (Form 1) and have a justification (Form 2). These requests are specific to the unit. A unit may seek and receive bids in anticipation of the possible release of one-time monies. Goods or services that cost greater than $5,000 will require bids which must go through the WCU Purchasing Department. The act of seeking and receiving bids does not obligate WCU to purchase that good or service. Be prepared to issue purchase orders based on bids, in case WCU is in a position to purchase before June 30, 2014.
  - **Recurring Requests** *(Forms 3 and 4)* – each request must be listed in priority order (Form 3) and have a justification (Form 4). These requests are specific to the unit.
  - **University-wide Initiatives** *(Forms 5 and 6)* – each request must be listed in priority order and have a justification. A university-wide initiative is a request that affects the entire university, such as a program or software package that benefits the entire university.

- **College Hearings**: Each College will schedule and hold a public budget hearing between January 21 - 31. Submit budget requests to Greg Hodges at least one business day prior to the college’s public hearing for posting to the website.

- **Submission to Provost**: Each Dean will submit his/her budget requests to the Provost by noon on February 7. These will be posted to the website.

- **Academic Affairs Division Hearing**: Each Dean/Associate Vice Chancellor will present his/her budget requests to the Council of Deans in the February 11 Academic Affairs budget hearing. The Chancellors Leadership Council and the Budget Advisory Committee members will be invited to attend the presentations.
  1. Each presentation will be limited to 20 minutes.
  2. All Deans/AVCs are required to attend all presentations.
  3. Separate units that do not report to a Dean/AVC (International Programs, etc.) will be allowed 15 minutes for budget presentations at the Provost’s discretion.

- **Academic Affairs Decision-making on Budget**: The Provost will assemble budget requests for the Deans/AVCs, Chancellor’s Leadership Council and the Budget Advisory Committee for discussion at the February 25 Council of Deans meeting *(called meeting)*. The Provost will lead discussions at this meeting to identify the most important budget priorities for academic affairs.

- **Submission to Chancellor**: The Provost will prepare the Academic Affairs budget request for the Chancellor’s Budget Hearings and submit to the Chancellor by February 28. The Provost will submit budget requests to Kristen Crosson by end of day on February 28 for posting to the website.
**ALL OTHER DIVISIONS (Non-Academic)**

- **Requests:** Budget requests will align with the 20/20 Vision. Requesters will submit recurring and one-time budget requests on the electronic templates to the Vice Chancellor/Divisional head. *Requests will address outcomes from any administrative and/or accreditation reviews in the request justification.*
  - One-Time Budget Requests (Forms 1 and 2) – each request must be listed in priority order (Form 1) and have a justification (Form 2). These requests are specific to the unit. A unit may seek and receive bids in anticipation of the possible release of one-time monies. Goods or services that cost greater than $5,000 will require bids which must go through the WCU Purchasing Department. The act of seeking and receiving bids does not obligate WCU to purchase that good or service. Be prepared to issue purchase orders based on bids, in case WCU is in a position to purchase before June 30, 2014.
  - Recurring Requests (Forms 3 and 4) – each request must be listed in priority order (Form 3) and have a justification (Form 4). These requests are specific to the unit.
  - University-wide Initiatives (Forms 5 and 6) – each request must be listed in priority order and have a justification. A university-wide initiative is a request that affects the entire university, such as a program or software package that benefits the entire university.

- **Division Hearings:** Each Division will schedule and hold a public budget hearing between January 21 – February 14. Each department head will present his/her budget requests. The Chancellor’s Leadership Council and the Budget Advisory Committee members will be invited to attend the presentations. Each presentation will be limited to 15 minutes. Submit budget requests to Kristen Crosson at least one business day prior to public hearing for posting to the website.

- **Decision-making on Division Budget:** The Vice Chancellor will assemble budget requests and lead discussions between February 1 - 20 within his/her Division to identify the most important issues facing the university.

- **Submission to Chancellor:** The Vice Chancellor will prepare his/her budget requests for the Chancellor’s Budget Hearings and submit to the Chancellor by February 24. Submit budget request to Kristen Crosson by February 24 for posting to the website.

**UNIVERSITY-WIDE BUDGET HEARINGS**

- Chancellor’s Budget Hearing will occur March 4:
  - Each member of the Executive Council will present his/her division/unit prioritized budget requests.
  - Presentations are limited to 30 minutes.
  - The Chancellor’s Leadership Council and the University Budget Advisory Committee will attend.

- Chancellor’s Leadership Council & Budget Advisory Committee Budget Retreat will occur March 10:
  - The Chancellor’s Leadership Council and the University Budget Advisory Committee will engage in dialogue to provide guidance on institutional budgetary priorities.

**FINAL DECISION ON INSTITUTION BUDGET**

- Chancellor and Executive Council discuss budget requests on March 17.
- Chancellor makes final decision on budget requests.