

## WCU 2017-18 UNIVERSITY BUDGET REQUEST INSTRUCTIONS & PROCESS

Budget requests for College and Divisional Hearings will be posted to the website [budgetprocess.wcu.edu](http://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, 2017.
  - 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 by November 22nd. Submit budget requests to Drew Thomas (Provost Office) and Ann Green (Budget Office) 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 college’s budget requests to the Provost by noon on November 22nd.
- **Provost Council Discussion:** The Provost Council will discuss Academic Affairs budget requests at the December 15<sup>th</sup> and January 11<sup>th</sup> meetings.
- **Submission to Chancellor:** The Provost will submit Academic Affairs’ budget requests to the Chancellor by January 20<sup>th</sup>. A copy of the division’s requests should also be forwarded to Ann Green in the Budget Office 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, 2017.
  - 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 November 1 – January 16. 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 Ann Green in the Budget Office at least one business day prior to the public hearing for posting to the website.
- **Decision-making on Division Budget:** The Vice Chancellor will assemble budget requests and lead discussions 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 January 20<sup>th</sup>. A copy of the division's requests should also be forwarded to Ann Green in the Budget Office for posting to the website.

## UNIVERSITY-WIDE BUDGET HEARINGS (see [budgetprocess.wcu.edu](http://budgetprocess.wcu.edu) for times & location)

- Chancellor's Budget Hearing will occur January 26, 1-4 pm:
  - Each member of the Executive Council will present his/her Division's prioritized budget requests.
  - Presentations are limited to 25 minutes.
  - The Chancellor's Leadership Council and the University Budget Advisory Committee should attend.
- Chancellor's Leadership Council & Budget Advisory Committee Budget Retreat will occur February 20:
  - The Chancellor's Leadership Council and the Budget Advisory Committee will engage in dialogue regarding institutional budget priorities.