

Faculty Senate Committee on Finance and Planning

Annual Report for 2011-12

As a standing committee of the Faculty Senate, the Committee on Finance and Planning is charged to “...serve as an information link between the faculty and the administration on finance and budget.”¹ The Faculty Senate Committee on Finance and Planning is essentially a bloc of faculty members who sit on the President’s Advisory Committee on Planning and Budget. The President’s Advisory Committee on Planning and Budget is comprised of stakeholders from all parts of campus, including representatives from Longwood’s student body, staff, and administration. What follows is a report on the activities of the President’s Advisory Committee on Planning and Budget from our perspective as committee members.

The President’s Advisory Committee on Planning and Budget is co-chaired by the Vice President for Academic Affairs and the Vice President for Administration and Finance. At the beginning of the year, the President’s Advisory Committee on Planning and Budget set as its goal the establishment of a more transparent, participatory process for budgeting and planning at the campus level. Although there was much information exchanged at these meetings, the members of the Faculty Senate Committee on Finance and Planning feels that little progress was made toward this goal.

The following is a summary of the activities of the President’s Advisory Committee on Planning and Budget:

- The Committee discussed the following information items:
 - Current budget processes at Longwood.
 - The Secretary of Education’s Budget Proposal for Higher Education for FY 12-13 and its potential impact for Longwood.
 - The Governor’s proposed budget for Higher Education for FY 12-13.
 - Progress reports on the budget proposals coming out of the Virginia House, Senate, and Governor’s Office.
 - A report from Doug Dalton, chair of the SACS Planning and Budget Task Force, which has been charged with recommending procedural and/or structural changes for the successful integration of strategic planning, resource allocation, and assessment at Longwood.
 - The allocation of end-of-year funds to the various vice-presidential areas at Longwood.
- The Committee did not vote on any action items (aside from the approval of minutes from previous meetings).
- The Committee did not forward any official recommendations to the President.

¹ FPPM, p. 169.

Recommendations:

- *Use of time:* While the information items mentioned above are all complex matters worthy of the careful consideration of the President's Advisory Committee on Planning and Budget, it is problematic that the entirety of the Committee's meeting time was devoted to just those items. Ideally, the budget data and accompanying narrative could be presented more concisely or, better yet, distributed in advance so that the Committee could devote more of its meeting time to establishing planning priorities.
- *Committee involvement in establishing planning priorities:* There were a number of factors in 2011-12 that, taken together, effectively drew the planning impetus away from the President's Advisory Committee on Planning and Budget:
 - Richmond required that Longwood submit the revised version of its Six-Year Plan in early fall of 2011, which made it necessary for many planning decisions to be made before the President's Advisory Committee on Planning and Budget convened for the year.
 - The campus was also in the process of formulating its Academic Strategic Plan, which made it difficult for the President's Advisory Committee on Planning and Budget to do its work, as there is potential for the Academic Strategic Plan to involve significant departures from Longwood's *status quo*. Until the plan is in place, it is hard to see how the President's Advisory Committee on Planning and Budget could reach clarity on how best to support the initiatives of the ASP.
 - Furthermore, at the time of this writing, Richmond has yet to reach consensus on a budgeting plan for higher education in Virginia, so it was impossible to have a definitive sense of the resources that would be available for 12-13 and 13-14.

Nevertheless, there was at least one matter on which the Administration might have sought input from President's Advisory Committee on Planning and Budget, namely the distribution of end-of-the-year funds for FY 11-12. Unfortunately, the Administration did not involve the Committee in the allocation process; instead, the Committee was informed about the allocations after they had already been made. In electing not to consult the Committee, the Administration missed out on a valuable opportunity to work with representatives from a broad set of campus constituents to make certain that the money allocated (\$1,394,778) was directed to the university's most pressing needs. We hope that in the future the Administration will take advantage of such opportunities to make the budgeting process more participatory and transparent by working with the President's Advisory Committee on Planning and Budget. We recommend that the membership of next year's Committee bring the matter up with the co-chairs early in the year, as it will likely take time to develop a process by which the Administration can meaningfully integrate feedback from the Committee into budget decisions.

The members of the Faculty Senate Committee on Finance and Planning look forward to the recommendations of the SACS Planning and Budget Task Force (due to be submitted to the President May 1, 2012). We are hopeful that the solutions they offer will include opportunities for faculty representatives to provide substantive input on budgeting and planning decisions here at Longwood.