

**Budget and Planning Council
Year End Report
May, 2018**

Council Membership:

- College of Arts & Communication: Joann Lee
- College of Education: James Alford
- College of Business: Ge Zhang
- College of Science & Health: Jill Nocella
- College of Humanities & Social Sciences: Gladys Vega
- Library: Judy Matthew
- Professional Staff: Ed Matthews
- Adjunct Faculty: Gary Steele
- Administrative Rep: Steve Bolyai, V. P. Administration & Finance

Council Charges and Summary of Council Activities

A. Standing Charges

1. Recommend University budget policy and overall direction
2. Advise and prioritize in matters related to institutional planning and finance
3. Examine and review the institution's proposed budget
4. Work with the administration in resolving fiscal concerns

B. Additional Charges (Priorities for 2017-18)

1. Examine the distribution of resources for the marketing of undergraduate and graduate programs

The Group spent a significant amount of its time developing reasoned questions that invited guests would be targeted to discuss. The invitees selected were S. Goldstein (VP Marketing & Public Relations) and P. Ferguson (VP Institutional Advancement). Upon receipt of the questions, each noted that they were to address the general Faculty Senate and would address those questions presented by the Council in their presentations. Goldstein presented to the Senate in January, 2018 and Ferguson in February, 2018. Both did attempt to address the issues raised regarding their respective areas such as how does WPUNJ compare in regard to benchmarks or in comparison to other institutions. Goldstein noted in his presentations that finding out specific budget expenditures related to advertising expenditures by institution is impossible as that is kept to each institution and generally not reported. He did give an overall sense of how the

university utilizes its marketing firm and where the focus of its efforts lie – social media.

In its discussions regarding the nature of institutional expenditures related to specific areas, the group explored the budget pages to see overall operations using Marketing and Public Relations as an example. This could be applied to any college or unit. There are limitations and these may need to be addressed. For example, though the reports require a sign on to review the reports, it was not possible to drill down to certain units – Cheng Library for example. This may be a suggestion for improvement and transparency. To view the information with broad breakdown of expenditures, follow these steps:

- 1) <http://www.wpunj.edu/budget/>
- 2) Select **Budget Development** and enter WPUNJ login credentials
- 3) Navigate to **FY15-17 Budget Reports**
- 4) Select unit to explore from **General Operations Divisional, College and Departmental Reports** or other areas listed.

Recommended Charges For The Next Academic Year:

We talked of inviting Jonathan Lincoln (Associate Provost for Curriculum and International Education) and Michael Yakubov, MBA Director. Are these budget issues or maybe these are some of the questions that should be addressed by the Graduate Programs Council? These are issues facing the Faculty Senate as graduate programs are reviewed and may be questions of how they are supported and administered. These concerns should be explored more systematically. As was noted in the December, 2018 meeting, the MBA program is different. But can any organizational changes in the colleges lend some support for the other work that must be accomplished for a successful and growing graduate program? Some questions raised by the Budget & Planning Council included: how does a program obtain extra support if needed or as with a dedicated MBA Director, are there other areas at this institution occupying positions similar to his in support of a program? Is there a model that can be adapted to other areas? Other questions posed included whether the deans at each college has any organizational responsibility for making strategic decisions in regard to the marketing priorities of these programs.

Since the adoption of the Capital Planning process implementation, a number of projects have been funded. The information regarding the approved and completed projects are publicized and made available to the community. There is concern regarding a noticeably absent part of the process - communication between unit/department, dean and upper administration of decisions related to submitted but unfunded projects. The Council believes Capital Planning

improvement requests process needs refinement with addition of feedback to units. Faculty Senate may charge the Budget & Planning Council with development of a feedback process as a charge for FY19.

Submitted by: Judy Matthew

Date: May 18, 2018