

Planning/Budget Hearing Guidelines 2021 - 2022

Purpose:

The primary purpose of the Planning/Budget Hearing for FY 2021 – 2022 is twofold. First, it provides an opportunity to report on your progress in meeting the goals of the University as set forth in the new UT Martin Strategic Plan. Second, it provides you an opportunity to submit information regarding recurring costs and to share with the administration any new funding requests for FY 2021 – 2022.

Presentation:

This year's budget planning will be framed around the UT Martin's Strategic Plan (See: http://www.utm.edu/strategic/docs/UR_StrategicPlan_Summary.pdf) with connection to the UT System's delivery of education, discovery, outreach and public service contributions to the economic, social and environmental well-being of all Tennesseans. We need you to link budgetary decisions to advancing that plan and demonstrating the alignment between the budget and the plans.

Organize the entire presentation using the five goals as your section headings and then specific objectives or priorities as subheadings. Be judicious in choosing those goals significant to your unit. For some units, there will not be entries for all five goals.

Looking back: For each goal or objective, outline brief progress summaries from the past year. Include assessment data of any budget requests funded in FY 2020 – 2021. Have evidence of your progress using your assessment templates as the foundation of your documentation. Those templates should cite the benchmarks you used to assess your progress. Updates of investments in the “Soar in Four” initiatives should be highlighted in the budget hearing documents.

Looking forward: For each goal or objective you choose, outline your expected outcomes for the coming year and the revisions in your planning. If you had specific funding requests approved last year, inform us of your assessment of those investments and improvements, if any are necessary. Explain your decisions based on evidence of the need for change. If you have new funding requests, your written request explanations should include answers to the following questions:

- What data source did you use to initiate the request (i.e. professional organization benchmarks, industry standards, or department data collection)? Examples include the increase in the number of majors, the increase in the number of student credit hours (SCH), or the start of new programs.
- How was the amount derived?
- What is the funding source (i.e. new, increase to existing, or reallocation)?
- What is the funding source duration (i.e. recurring or non-recurring (one-time))?
- If for operating budget, how will maintenance cost be covered?
- How is the work or function being completed currently?
- Is technology available to improve efficiency?

We welcome decisions to eliminate, reduce, or otherwise achieve efficiencies. As efficiencies are recognized, units are encouraged to reallocate existing funds for other needs. Also, units are encouraged to seek self-supporting initiatives to advance their areas. Similarly, vacant positions should be reviewed to determine the most effective staffing needs. Be sure and identify those proposed actions in your reports.

For mandatory increases to existing fixed cost requirements such as utility increases, maintenance contracts, or other contract/required increases, use the Funding Request Form and complete the Fixed Cost section for these requests. Only the increased cost should be listed (Example, additional cost of

officials in 2021-22 vs. 2020-21).

You may request **two** new items for funding (four for academic affairs) as recurring, one-time, or a new initiative. Those requests must be prioritized and more than \$5,000. We want you to enter them into your presentation and then on the “Funding Request Form” (See: <http://www.utm.edu/departments/budgetmgmt/hearings.php>.) In your overview, be specific in identifying the expected outcomes you hope such an investment will produce. Those will be commitments for the year and assessed next year. No salary increases can be included in budget requests.

To assist with data resources, see: <https://www.utm.edu/departments/irp/>. On the left panel you will find, Statistical Reports, Workload, and Peer Institutions. You can reference these data or use the specific data you are using to track your strategic initiatives as part of your assessment of your specific outcomes. You will find a treasure trove of data in the updated “Statistical Reports (2020 - 2021) Factbook” at: https://www.utm.edu/departments/irp/statistical_reports.php