

University of Houston-Clear Lake
Planning and Budget Calendar, Preparing for Fiscal Year 2019-2020

Revision: December 3, 2018

Dates are subject to change

| Date | FY2020 Plan/Priorities | Office of Institutional Effectiveness (OIE) FY2018 - FY2019 | FY2020 Tuition and Fees | FY2020 Budget |
|---------------|--|---|---|---|
| October, 2018 | | | Enrollment Management provides enrollment projections for FY2020. | 2nd Submission of LAR to LBB, posted on Budget Office's website |
| Oct 31, 2018 | | Support Units/College representatives Submit 2017-2018 Assessment Plans to OIE, after completing "Results" and "Use of Results with fall, spring, and summer data; roll over plans for 2018-2019 revising outcomes and methods as needed. | | |
| Oct 31, 2018 | Support Units/Colleges begin developing the FY2020 Assessment Plan with the changes identified in the "use of results" in the FY2018 Assessment Plan. Identify whether or not new funding will be needed in FY2020. This includes departments that generate Major Fees (SSF, IRF, EASF) since FY2020 Tuition and Fees were already approved (increase to Designated Tuition only). | | | |
| Nov 1, 2018 | President makes presentation to UHCL community. | | | |
| Nov 12, 2018 | | | Budget Office reviews calendar with Student Life and SGA President. | |
| Dec-Jan, 2018 | | | | Hyperion Planning & Budget Training for all end users. <i>(detailed training calendar will be provided)</i> |
| Dec, 2018 | | | SGA Pres begins notifying students of important Tuition & Fee meetings (Jan 22 and Feb 5) | |
| Jan 10, 2019 | | | | Legislative Session begins. |
| Jan 11, 2019 | | | | FY2019 reclassifications due to HR. |
| Jan 22, 2019 | | | PBC and SGA: Information Meeting only for previously approved FY20 DT increase and state tuition changes for non-resident students. | |
| Feb 5, 2019 | | | Follow up meeting of SGA to ask questions and provide comments. | |
| Feb 15, 2019 | Departments submit FY2020 Funding Request Form to Unit Head or College. | | | |

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| Feb 20, 2019 | | | | FY20 Reclassifications, effective 9/1/2019, due to HR in order to be reflected in the FY2020 Budget. |
| Mar 1, 2019 | | | | HR verifies that current performance assessment is on file for staff. |
| Mar 8, 2019 | Units/Colleges submit FY2020 Funding Request Form to Component Head. | | | |
| Mar 9, 2019 - Mar 31, 2019 | Components prioritize funding requests under their supervision. | | | |
| Mar 15, 2019 | | | | All faculty equity (Provost's Office) and staff pay plan (HR) decisions are finalized. |
| Mar 31, 2019 | | | | Load data as of 3/31 to BDM. |
| Week of Apr 1, 2019 | Components present their initiatives to their faculty and/or staff. Faculty and staff are encouraged to provide feedback regarding inclusions, exclusions, and order of list. | | | |
| Week of Apr 8, 2019 | Component Heads combine initiatives lists. | | | |
| Week of Apr 15, 2019 | Component Heads present list to entire UHCL community at PBC meeting. Comments are encouraged and can be heard during meeting or emailed to Component Heads. Comments will be taken into consideration before final list is sent to PBC. | | | Merit worksheet to Business Administrators (base-funded positions as of 3/31 if approved for funding). |
| Week of Apr 15, 2019 | | | | Hyperion Training. |
| Apr 24 - June 10 | | | | Depts identify recipients for faculty and staff merit. |
| May 1- May 18 | | | | "Update" access to Hyperion. |

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| May 1, 2019 | | Assessment Reporting Cycle begins with the opening of AMS (Taskstream). Support units and college representatives begin to complete 2018-2019 Assessment plans, providing "Results" and "Use of Results" with fall, spring, and summer data and indicating 2020-2021 funding requests in Use of Results; roll over plans for 2019-2020 revising outcomes and methods as needed. | | |
| May 19, 2019 | | | | "View only" access for Business Administrators. |
| May 29, 2019 | | | | Legislative Session ends. |
| June 3, 2019 - June 5, 2019 | PBC makes funding allocations recommendations and forwards to University Council via email. | | | |
| June 7, 2019 | UC recommends allocations to President via email. | | | |
| June ??, 2019 | Plan and Budget Summary due to UHS. | | | |
| June 14, 2019 | | | | Depts submit staff merit recommendations to VPs/President. |
| June 14, 2019 | | | | Colleges submit faculty merit/equity recommendations to Provost. |
| June ??, 2019 | President presents FY2020 Annual Plan to UHS. | | | |
| June 21, 2019 | | | | All final salary decisions to Business Administrators. |
| June 28, 2019 | | | | Business Administrators complete budgets. All required documents due to Budget Office. |
| July 14, 2019 | | | | Final Plan and Budget due to UHS. |
| Aug 22, 2019 | -----BOR approves FY2020 Annual Plan and Budget----- | | | |
| Aug 25, 2019 | | | | Pending Board approval, supervisors can share new year salary with employees. |