

University of Houston-Clear Lake
Planning and Budget Calendar, Preparing for Fiscal Year 2020-2021

DRAFT

Version: November 20, 2019

All dates subject to change

Due Date	FY2021 Plan/Initiatives	Office of Institutional Effectiveness (OIE) FY2019	FY2021 Tuition and Fees	FY2021 Budget
September, 2019			Budget Office reviews calendar with SFAC and SGA President.	
September, 2019			VPAF Office schedules date, time, location of Town Hall Meetings for week of November 12, 2019. Notifies SGA president.	
Oct 8, 2019	President makes "State of the University" address to UHCL community.			
October, 2019			Enrollment Management provides enrollment projections for FY2021.	
October, 2019			SGA Pres begins notifying students of important Town Hall Meetings week of November 12; Tuition and Fee meetings on November 12 and November 19.	
Oct 24, 2019			All tuition and fee forms due to Planning & Budget Office.	
Oct 31, 2019		Support Unit/School representatives complete FY2019 "Assessment Results" in Assessment Plan with previous year's data. Document if deletion, modification, and/or addition of outcomes, strategies, assessment methods and/or criteria for success is needed by updating the "use of results" based on historical multi-year data.		
Oct 31, 2019	Support Units/Schools begin developing the FY2021 Assessment Plan with the changes identified in the "use of results" in the FY2019 Assessment Plan. Identify whether or not new funding will be needed in FY2021.			
Nov 12, 2019			Tuition and fees presented to SGA and PBC.	
Nov 19, 2019			Follow up meeting of SGA to ask questions and provide comments.	
Nov 19, 2019			PBC reviews and recommends tuition and fee requests. Forwards recommendation to Univ Council.	
Dec 12, 2019			Univ Council reviews and recommends tuition and fee requests to President.	
Dec 15, 2019	Submit FY2021 Funding Request to Unit/Dean.			

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Jan, Early	FY2020 Non-Funded Initiatives to Division Vice Presidents.		Town Hall Meeting to discuss Designated Tuition	
Jan 12, 2020				All FY2020 reclassifications due to HR.
Jan 13, 2020	Submit FY2021 Funding Request to Division Vice President.			
Week of Jan 20, 2020	VPs prioritize FY2021 initiatives under their supervision.			
Week of Jan 27, 2020	Division VPs present their FY2021 initiatives to their faculty and/or staff. Faculty and staff are encouraged to provide feedback regarding inclusions, exclusions, and order of list.			
Jan 31, 2020			Tuition and Fees due to UHS.	
Week of Feb 3, 2020	Division Vice President's combine initiatives.			
Week of Feb 10, 2020				Hyperion Training
Week of Feb 12, 2020	Vice Presidents present initiatives list to entire UHCL community at PBC meeting. Comments are encouraged and can be heard during meeting or emailed to Vice Presidents. Comments will be taken into consideration before final list is sent to PBC.			
Feb 12, 2020				FY2021 Reclassifications, effective 9/1/2020, due to HR in order to be reflected in the FY2021 Budget.
Feb 14 - 23, 2020	PBC makes funding recommendations for initiatives.			
Feb 19, 2020				All faculty equity (Provost's Office) and staff pay plan (HR) decisions are finalized.
Feb 22, 2020			BOR approves Tuition and Fees.	
Feb 24 - Mar 12				Depts identify recipients for faculty and staff merit.
Feb 26, 2020				All Base budget journals complete and due on Budget Office worklist 2/26/2020.
March	Plan and Budget Summary due to UHS.			
March	President presents FY2021 Annual Plan to UHS.			
March 1, 2020				HR verifies that current performance assessment is on file for staff.
March 1, 2020				Load data as of 2/28 to begin budget development.

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March 5, 2020				Merit worksheet to Business Administrators (base-funded positions as of 2/28).
March 7, 2020				"Update" access for budget development.
March 8, 2020	UC approves allocations.			
March 12, 2020				Depts submit staff merit recommendations to VPs/President.
March 12, 2020				Schools submit faculty merit/equity recommendations to Provost.
March 21, 2020				All final salary decisions to business coordinators.
March 28, 2020				Business Administrators must balance and complete all data entry. All budget worksheets/documents submitted to Planning & Budget Office by 5:00 pm. "View Only" access given to business coordinators.
April 16, 2020				Final Plan and Budget due to UHS.
May 24, 2020	-----BOR approves FY2021 Annual Plan and Budget-----			
May 25, 2020				Pending Board approval, supervisors can share new year salary with employees.