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DOC 1985-03 Procedure for the Academic Senate and the Executive Committee on the University Budget Process and Content

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PROPOSAL TO THE ACADEMIC SENATE

Procedure for the Academic Senate and the Executive Committee on the University
Budget Process and Content

TITLE:

The Budget Policies Subcommittee of the Executive Committee of the Academic
Senate, K. Dickinson, G. Fuchs, N. Phillips, and R. Yates

SUBMITTED BY:

DATE: April 18, 1986

Indicate the action required: Legislative, Concurrence, or Consultative, and
refer to the appropriate reference in the Senate Constitution (Article IIB, 1, 2, 3).

ACTION IS: Procedure

REFERENCE IS:

DESCRIPTION OF PROPOSAL: State objectives, rationale, and how proposal is to be
implemented

INTRODUCTION

The Executive Committee of the Academic Senate has the opportunity to contribute to the University of Dayton's annual budget, both in its process and its content. The Executive Committee and the Academic Senate also have the opportunity, and responsibility, to influence University policy and operations. The Executive Committee and the Senate have had several years of experience from which to draw, and it is time to evaluate and recommend changes in the operations of the Executive Committee and the Senate.

The Budget Policies Subcommittee of the Executive Committee of the Academic Senate, an ad hoc committee comprised of Senators Dickinson, Fuchs, Phillips, and Yates, identified the following six critical issues. The first four pertain to the budget, the last two with non-budget items.

1. The need for continuity in Executive Committee membership from one year to the next.
2. Frustration regarding the budget process.
3. Frustration regarding the Executive Committee's impact on the budget content.
4. The need to have information available in a timely, efficient manner.
5. Frustration with the Senate's interest in dealing with important issues.
6. The need for the Executive Committee to take more of a leadership role in the operations of the Senate.

The Subcommittee has devoted considerable thought, time, and effort in its evaluation of the Senate and the recommendations presented in this document address each of the critical issues. The document is organized around three sections, (1) the budget process, (2) budget issues, and (3) the operations of the Executive Committee and the Senate.

THE BUDGET PROCESS

The following process is recommended for the Executive Committee's involvement in the University's annual budget process.

1. Each year the new Executive Committee needs background information about the budget. Therefore, information should be provided from the previous year. This could be done by the Provost or by members of the previous Executive Committee. The new Executive Committee would then be familiar with the form of the budget and all the issues which are included. The issues should be prioritized for the new members so that time is allocated to those issues which are important to the Executive Committee. This briefing should be held as early in the academic year as possible. At this time the Executive Committee would select those issues it elects to address during the budget process. (Refer to the next section on budget issues.)

2. The briefing would be followed by a period during which significant issues would be identified and data collected and examined. The Executive Committee would take the initiative to gather information and to formulate recommendations on the previously identified issues. During this period, the schedule for the PMC budget deliberations should become available. The Executive Committee would then know the time frame for their work and should be ready to ask the hard questions during the PMC meetings. Circumstances may arise when data collection and evaluation takes longer than the time available. In this case the Executive Committee should pursue the investigation in preparation for the next year's budget.

3. The Executive Committee should meet among themselves during the investigations and, as much as possible, confer with the Senate on budget issues and make decisions within the Senate structure.

4. The Executive Committee should be actively involved in deliberations with the PMC when topics of mutual interest are scheduled to be discussed. It is not necessary for the Executive Committee to be involved in all deliberations, especially those which it cannot influence. The Committee should represent a collective voice and be ready to make recommendations regarding those issues identified as being critical. It is important that the Executive Committee be prepared to take a leadership role in the budget deliberations and to work in cooperation with the PMC to arrive at decisions which will benefit the University of Dayton.

BUDGET ISSUES

The Executive Committee does not need to be involved with every budget item. It is important for the Executive Committee to identify a few specific issues which are critical and to devote its efforts to those select issues. The following list includes examples of possible issues. (These are examples only.)

1. Faculty compensation policy, including merit and the election of a compensation committee.
2. The priority given to faculty compensation in the budget.
3. Fringe benefits.
4. The priority given to fringe benefits in the budget.
5. Budget method, including the objective-task method versus the current tuition driven method.
6. The impact of new technology.
7. Future issues, education in the year 2000.
8. Additional and/or alternative methods of faculty development.
9. Administrative turnover.
10. Nontraditional forms of education
11. Alternative sources of revenue
12. Nontraditional markets.
13. Competitive environment.
14. Faculty unionization.

15. The need for a faculty lounge or club.
16. The development of a marketing plan for the University.

As a guide, the Executive Committee should consider all facets of the university with which faculty members interact. For example, they interact with other faculty, administrators, facilities, and university goals and objectives. Such interaction provides the framework for identifying issues.

OPERATIONS OF THE EXECUTIVE COMMITTEE AND THE ACADEMIC SENATE

The Executive Committee should plan as much as possible for the entire next year during the last few weeks of the academic year. There are several activities which occur every year -- budgeting being but one. These activities should be anticipated, organized, and delegated as appropriate. Examples of other yearly activities include: (1) making committee appointments, (2) reviewing the University Direction Statement, (3) elections of Senate members, and (4) setting the initial agenda for the next academic year, including subcommittee work.

Each subcommittee should submit to the Executive Committee at the end of each academic year a summary of the committee's activities throughout the year. This summary should also include a statement of issues and activities which are still pending before the committee. The Executive Committee would then use this summary for setting the initial agenda for the next academic year. The Vice President of the Academic Senate could meet with each subcommittee at the beginning of each academic year to review the Senate's procedures and the initial agenda.

The Executive Committee should take a leadership role by initiating actions, scheduling activities for the Senate committees, and providing information as necessary to the committees. Such leadership at all levels would enhance the image of the Senate and thus, its influence. It is also important for the Executive Committee to be ready to respond to issues as they emerge -- in other words, to be flexible.

Some changes in committee structure may facilitate this leadership role. First, Executive Committee members should not serve on other Senate committees unless the Senator so desires. The chairpeople of the Senate committees should attend the Executive Committee meetings when their committee's activities are relevant to Executive Committee items. Second, it should be understood that service on the Executive Committee involves a serious commitment of time and effort and this should be taken into account when that member receives course assignments, committee assignments, and other university duties.