



# CHAPMAN UNIVERSITY

Budget Office

(714) 997-6910 • FAX (714) 997-6905

Date: May 1, 2018  
To: Senior Staff, Deans and Directors  
From: Harold Hewitt Jr., EVP/COO  
Michael Price, AVP for Finance & Budget  
Subject: 2019-20 Budget

Colleagues – we are writing to provide you with information and deadlines for the 2019-20 budget planning process. The process has been designed to ensure university-wide participation in the allocation of operating resources consistent with the President’s Strategic Plan and the related priorities as approved by the Board of Trustees.

As you know, the budget process timeline was accelerated eight years ago with final action by the Board coming in December instead of March. This year’s process will be the same as last year’s. The period of time from today through August 1 is the window of opportunity for faculty and administrative leadership to provide input into the 2019-20 budget process. Feedback the last couple years indicated that many academic leaders prefer working during the summer months on their budget proposals.

We are working toward the goal of having the full operating budget (both revenue and expenses) considered by the Board of Trustees when the Board must act on undergraduate and graduate tuition price level proposals. Net Tuition constitutes the majority of Chapman’s annual operating revenue. In order to recruit new students, prices for the coming year must be set by the final Board meeting of the current calendar year. Setting tuition is a major component of projected total revenue, accordingly, the Board is well served when trustees can evaluate both the tuition price level proposal and, at the same time, the expense priorities it will fund.

We suggest that before you commit time to developing detailed budget proposals you consult with Provost Pfeiffer, EVP Hewitt or EVP Bourgeois as is appropriate regarding the potential for their consideration this year. As usual, requests for increased funding for new or existing programs and capital expenditures must indicate, when possible, the strategic plan objective to which the funding relates. These requests are to be prioritized by the appropriate senior staff member prior to their submission to the Budget Office. Resources that are available beyond what is required to fund the baseline budget will be allocated to the University’s highest priorities. As usual, the administration, staff, and faculty salary budgets will be based on approved positions. All other positions and adjustments must be requested as enhancements.

The following annual budget request form is attached:

Budget Enhancement Request – Use this form to request all new funds including new positions, operating enhancements and capital expenditures.

Please contact your fiscal manager for instructions before preparing your requests on this form as they may prefer requests be submitted in an alternate manner.

To ensure appropriate participation in this year's process, please distribute the enclosed information to the budget partners within your area. This form is available in MS Excel format on the Chapman website at <http://www.chapman.edu/campus-services/budget-office/index.aspx>. The calendar below details the budget development process that culminates with the Board of Trustees meeting on December 10. Please contact Mike (x. 6896) or Harold (x. 6717) if you have questions.

## Chapman University 2019-20 Budget Development Calendar

May 1	Budget calendar and enhancement form distributed and available on web page
May 1– August 1	Budget units prepare budget enhancement requests – <i>your opportunity for input into the process</i>
August 1	Enhancement requests due to Provost or EVP for prioritization
August 20	Proposed changes in fees due to Provost or EVP. Senior staff proposes tuition rates. Vice President of Enrollment Services notifies deans.
September 4	Enhancement requests and proposed changes in tuition and fees from Provost or EVP due to Budget Office
September 4 – September 24	Budget Office analyzes requests, identifies issues, holds discussions and prepares recommendations
September 24 – October 19	Executive Vice President/COO reviews the proposed budget with the President and Senior Staff
November 26	President and EVPs present the broad outlines of the proposed budget to the Finance & Budget Committee
December 10	Board of Trustees approve broad outlines of proposed budget