ANNUAL REPORT

Strategic Planning and Budget Study Committee

University of North Alabama
Florence, Alabama

Jennifer Dawson (Aug-April) Tommie Singleton (May-Aug)	08/10/2026
Committee Chair	Date submitted

Submitted to: __Dr. Lauren Killen__________
Chair, Shared Governance Executive Committee

UNIVERSITY OF NORTH ALABAMA

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2025-2026

I. Executive Summary

The Committee revised the REFUND policy releasing the new policy before March 16, 2026 SGEC meeting.
Vice Chair was elected at September 16, 2025: Dr. Tommie Singleton
Applications were collected for financial needs. In early May before the scheduled Committee meeting May12, the current chair (Jennifer Dawson) was unable to continue. The Vice Chair (Tommie Singleton) assumed the chair duties and postponed the presentations to June 3. On that date, attending applicants presented their application to the Committee. Members subsequently ranked and rated all applications and voted unanimously to forward the list by ranking to VP for Business & Financial Affairs on July 8, 2026.

II. The Committee's Charge (from the Shared Governance Document)

Strategic Planning and Budget Study Committee Charge

1. To participate in all aspects of strategic planning, including:
a. Reviewing procedures for university strategic planning;
b. Relating the strategic planning process to the annual reports; and
c. Reviewing progress and recommending updates to the University's Strategic Plan annually.

2. To conduct systematic reviews of expenditure needs and revenue needs including:
a. Reviewing and prioritizing recommendations from all areas of the University concerning financial resource needs, based on the University's Strategic Plan;
b. Reviewing links between budget requests and departmental annual reports;
c. Reviewing results reported by the Institutional Effectiveness Committee to support assessment, evaluation, improvement;
d. Reviewing prioritized recommendations from the Facilities and Infrastructure Committee to monitor conformity with the University's Strategic Plan; and
e. Conducting systematic reviews of actual and planned expenditures.

3. To communicate its deliberations and findings to the President, and after discussion with the President, to the University community.

III. The Committee met on the following dates:

Sept. 16, 2025 Nov. 21, 2025 Feb. 25, 2026 June 3, 2026

IV. What were the Committee's actions and accomplishments this year relative to each of the items of the charge?

1. To participate in all aspects of strategic planning.
   The Committee spent a few months revising the REFUND policy.
   The final document was submitted to SGCE.
2. To conduct systematic reviews of expenditure needs and revenue.
   Applications were accepted for needs, presented, analyzed by rankings and ratings for those needs.
3. To communicate its deliberations and findings to the President, and after discussion with the President, to the University community.
   These actions and results were communicated to the designed administrative party.

V. What were the Committee's formal recommendations?

Revise the REFUND policy to update it and improve the process.
Financial needs were ranked and rated then reported to the VPBFA.

VI. What does the Committee plan to accomplish?

To continue to search for ways to improve policies and procedures under our purview. To continue to analyze special needs through the established process.
To build a better base of information and documentation for incoming members, especially officers.

A. In the coming year?

Some improvement in all three above.

B. In future years?

Same as above.

VII. What are the Committee's weaknesses?

A better process for equipping Chair and Vice Chair to carry out their duties with effectiveness.
Better communications among members so that all know their particular role and responsibilities.

A. What can the Shared Governance Committee help you do to address the weaknesses?

Provide technology, support for changes needed.

VIII. Comments

My apologies for the inefficient process of assessing applications for financial needs. The sudden departure of the current chair was a shock. She was taking care of everything and doing it well. But I was ill-prepared to take over with sufficient effectiveness. The delay ran into the summer which created a lot of absentee members during June and July that slowed the process considerably. It also probably caused stress and uncertainty for applicants.