

# **ANNUAL REPORT**

## *STRATEGIC PLANNING & BUDGET STUDY*

**University of North Alabama  
Florence, Alabama**

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Committee Chair

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Date submitted

Submitted to: Dr. Kristy Oden  
Chair, Shared Governance Executive Committee

# UNIVERSITY OF NORTH ALABAMA

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2022-2023

- I. Executive Summary  
During the 2022-23 academic year, the Strategic Planning and Budget Study Committee was engaged with reviewing SPBS Committee-related policies for the Policy Environment Task Force and soliciting and recommending one-time funding requests for President Kitts's review.
- II. The Committee's Charge (from the Shared Governance Document)
  1. To participate in all aspects of strategic planning, including:
    - o Reviewing procedures for university strategic planning;
    - o Relating the strategic planning process to the annual reports; and
    - o Reviewing progress and recommending updates to the University's Strategic Plan annually.
  2. To conduct systematic reviews of expenditure needs and revenue needs including:
    - o Reviewing and prioritizing recommendations from all areas of the University concerning financial resource needs, based on the University's Strategic Plan;
    - o Reviewing links between budget requests and departmental annual reports;
    - o Reviewing results reported by the Institutional Effectiveness Committee to support assessment, evaluation, improvement;
    - o Reviewing prioritized recommendations from the Facilities and Infrastructure Committee to monitor conformity with the University's Strategic Plan; and
    - o Conducting systematic reviews of actual and planned expenditures.
  3. To communicate its deliberations and findings to the President, and after discussion with the President, and after discussion with the President, to the University community.
- III. The Committee met on the following dates:  
All committee work was handled via ebusiness on the following dates: August 24, 2022; November 3, 2022; April 4, 2023
- IV. What were the Committee's actions and accomplishments this year relative to each of the items of the charge?

Since the University's Strategic Plan is concluding, Dr. Alexander shared that The **Roaring with Excellence Strategic Plan** is 80% complete and that early in the 2023 semester, he will work with President Kitts to begin the process of crafting the Task Force/Committee to guide the next five-year strategic plan and made a commitment to engage the SPBS Committee throughout this process.

With a University budget deficit, funds allocated to the Strategic Planning and Budget Study Committee were unavailable. However, President Kitts committed to working with Mr. Thornton to find Foundation funds to assist with one-time funding requests, as prioritized by the Committee.

- V. What were the Committee's formal recommendations?  
The Committee recommend one-time funding requests for President Kitts's and Mr. Thornton's review.
- VI. What does the Committee plan to accomplish
  - A. In the coming year?  
As Chair of the Committee, I anticipate this committee will be highly engaged with concluding The **Roaring with Excellence Strategic Plan** and providing input and leadership with the new strategic plan.
  - B. In future years?
- VII. What are the Committee's weaknesses?
  - A. What can the Shared Governance Committee help you do to address the weaknesses?
- VIII. Comments