

OAA IPEB Process

Faculty Senate , November 1, 2021

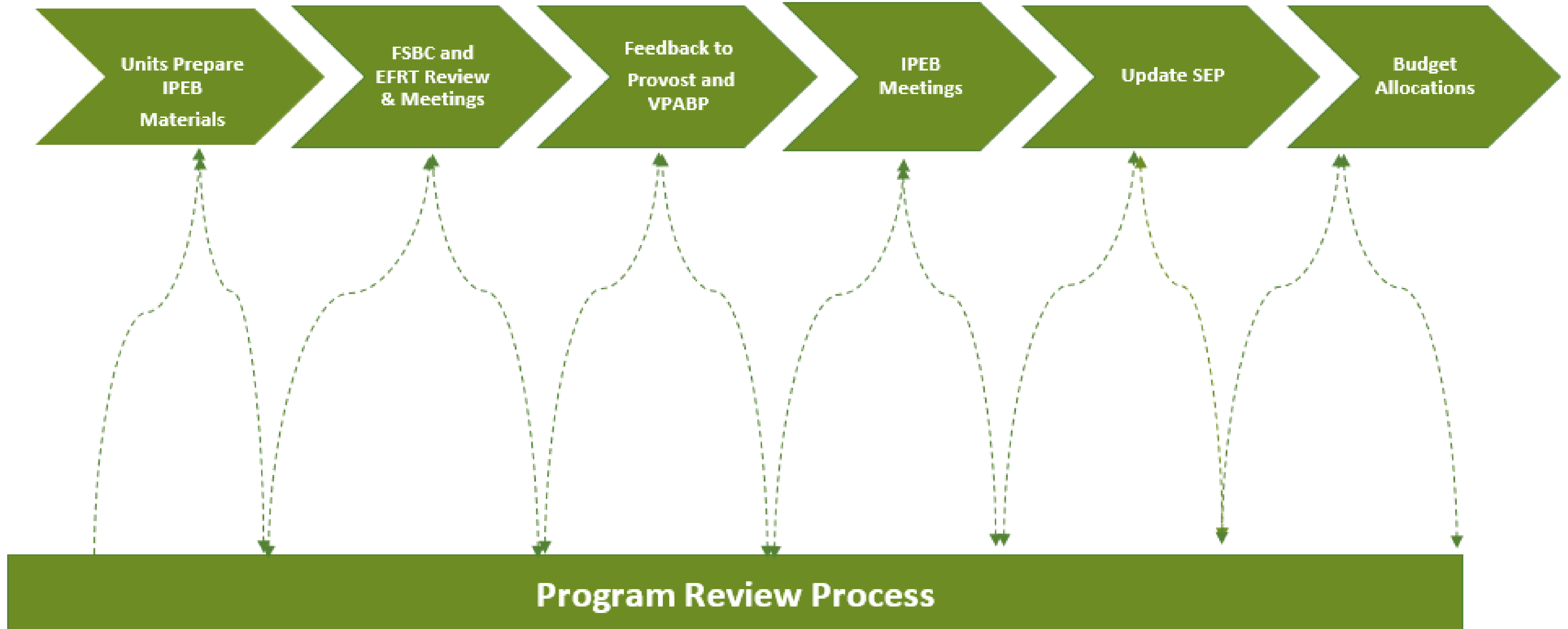


Integrated Planning of Enrollment and Budget (IPEB) Process

- ***OAA annual process to support strategic enrollment management, unit level strategic planning and resource allocation***
- ***Process is reviewed and agreed between the Faculty Senate Budget Committee, Provost and Academic Budget and Planning***
- **Iterative process to align academic planning decisions with institutional enrollment and revenue forecasts**
- **Facilitates discussion about budgets among multiple stakeholders**



IPEB Process Flow



FSBC - Faculty Senate Budget Committee

EFRT - Enrollment Forecast Review Team (Chuck Kneple, Vice President for Enrollment Management, Rossitza Wooster, Dean of Graduate Studies, Kathi Ketcheson, Director, OIRP, Andria Johnson, Associate Vice President, University Budget & Financial Planning)

VPABP - Vice Provost for Academic Budget and Planning

Key IPEB Materials

Document	Purpose
Strategic Enrollment Plan (SEP)	Based on initial OIRP* projections of department-level enrollment, enrollment-generating units develop unit-level plans/projections. These are informed by both unit-level and institutional enrollment trends. This information is shared with OIRP for consideration in OIRP's institutional projection model. The enrollment plans are updated throughout the process, based on updated enrollment forecasts, which are the basis of the University's tuition revenue forecast. The SEP should also incorporate trend information from the PRWG Driver Metrics Dashboards.
Strategic Planning Narrative (SPN)	To gain an understanding of how investments, reductions and cross-functional collaborations may impact enrollment and retention for the coming academic year. The SPN should also incorporate information from the PRWG Dashboards to address topics of completion and service courses.
Budget Scenarios	Outline possible annual cost increases and unit scenarios to achieve a balanced budget. Any proposed adjustments that result from the Program Review/Reduction Process should be included here.
Resource Plans	Identify areas of investments that could increase tuition revenue or other revenues, based on Dashboard data and enrollment trends.
Remissions Request	Requests remissions based on enrollment trends, the SEP, and OIRP enrollment projections.
Management Reserves Spending Plans	Provides details of strategic use of management reserves for current and future years.

*Office of Institutional Research and Planning, member of EFRT.