

FY22-23 Integrated Planning of Enrollment and Budget Process

The **Integrated Planning of Enrollment and Budget (IPEB)** is the annual process that is used by the Office of Academic Affairs (OAA) to support strategic enrollment management, unit level strategic planning and resource allocation in a logical, transparent and efficient manner. The IPEB process is reviewed and agreed between the Faculty Senate Budget Committee, Provost and the Office of Academic Budget and Planning. This process requires input and collaborations from the following groups:

- College, School and Academic Support unit leadership and fiscal officers
- Faculty Senate Budget Committee (FSBC)
- Enrollment Forecast Review Team (EFRT)
- Academic Leadership Team

The IPEB Process requires the following materials to be prepared by the College, School and Academic Support units (if applicable). An Equity Lens should be incorporated into all phases of the IPEB process.

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 managements reserves for this and future years.

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

The IPEB Process is a multi-month process. Detailed process steps are outlined in the following flow chart.

For FY 22-23, the IPEB process will run in parallel to the Program Review Process. The materials and discussions in these two processes will be used to continue to iterate and inform the on-going discussions in both processes.

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