

ANNUAL REPORT

*Strategic Planning Budget
Study Committee*

**University of North Alabama
Florence, Alabama**

Dr. Kevin L. Jacques

Committee Chair

8/15/25

Date submitted

Submitted to: Dr. Becky Smith
Chair, Shared Governance Executive Committee

UNIVERSITY OF NORTH ALABAMA

ANNUAL REPORT 2024-2025

I. Executive Summary

The Committee placed a priority on convening in person throughout the year, resulting in a series of highly productive meetings. Deliberations centered on assessing alignment with the Committee's formal charge, accompanied by a collective recognition of the need for continued efforts to fully achieve it. This year also marked a milestone, with a record number of funding proposals submitted and, for the first time, all requests receiving approval.

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

To participate in all aspects of strategic planning, including:

1. Reviewing procedures for university strategic planning
2. Relating the strategic planning process to annual reports
3. Reviewing progress and recommending updates to the University's Strategic Plan annually

To conduct systematic reviews of expenditure needs and revenue needs including:

1. Reviewing and prioritizing recommendations from all areas of the University concerning financial resource needs, based on the University's Strategic Plan
2. Reviewing links between budget requests and departmental annual reports
3. Reviewing results reported by the Institutional Effectiveness Committee to support assessment, evaluation, and improvement
4. Reviewing prioritized recommendations from the Facilities and Infrastructure Committee to monitor conformity with the University's Strategic Plan
5. Conducting systematic reviews of actual and planned expenditures

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:

9/20/24

10/11/24

12/13/24

3/14/25 w. IE Committee

5/14/25

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

The Committee commenced the year with a comprehensive review of its formal charge to assess alignment between its stated responsibilities and its current activities. It was determined that, in recent years, the Committee's efforts had centered primarily on the evaluation and recommendation of one-time funding requests, thereby deviating from its core purpose of engaging in strategic budgeting and planning.

In collaboration with the Institutional Effectiveness Committee, the Committee recommended to the Shared Governance Executive Council (SGEC) that an independent, external review of the Shared Governance process be conducted. This recommendation was subsequently approved, and arrangements for the external evaluation are now underway.

Additionally, the Committee facilitated the allocation of a record level of funding in the current year, with approvals totaling over \$300,000 in one-time requests. The Committee expresses its sincere appreciation for the resources provided, which will yield a significant positive impact across the institution.

V. What were the Committee's formal recommendations?

See above.

VI. What does the Committee plan to accomplish?

A. In the coming year?

Continuation of the evaluation of the formal charge via the external review.

B. In future years?

VII. What are the Committee's weaknesses?

In the past, the committee has been used primarily to guide the funding requests for the President. It really has not done much with any budget areas or strategic planning.

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

The external review should help guide the committee work back to what it was designed for.

VIII. Comments