

# Budget Submission Supplemental

Revised February 2019 (Assigned BFPO Support)

2019 2020



November 2018

# Table of Contents

---

1	Use of Appendices for Budget Plan Submissions .....	2
2	Information in Budget Plans and Requests.....	2
3	Resourcing, Support and Timeline for a Successful Submission.....	3
3.1	Resourcing and Suggested Timeline.....	3
3.1.1	Late Nov to Early Dec (Be familiar with your current budget) .....	3
3.1.2	Mid Dec (Receive a draft of narrative for the coming year) .....	4
3.1.3	Early Jan (Prepare budget plan form with FRS for 19/20).....	4
3.1.4	Mid to Late January (Review and revise plans/requests) .....	4
3.1.5	Mid-February (Approval Signatures and Submission) .....	4
3.2	Budget and Financial Planning (BFPO) Support.....	4
3.2.1	Acceptable Support .....	4
3.2.2	What support doesn't look like .....	5
3.3	Assigned Budget Planning Unit BFPO Rep for 2019 2020 .....	0

# 1 Use of Appendices for Budget Plan Submissions

---

Although there are no restrictions on the number of appendices that a Budget Planning Unit can attach to a plan, be mindful to prioritize the most important appendices upfront.

Furthermore, at some point, the number of included appendices submitted along with the plan will not add value to the narrative and in some cases can dilute the importance of your planning unit's strengths and initiatives.

Best takeaway: Be strategic in your use of appendices.

## 2 Information in Budget Plans and Requests

---

Planning units will use qualitative and quantitative information to support their submissions. An assessment and strength of the plans and requests will be weighed against an alignment to institutional and the planning unit's strategic agenda, the urgency of the activity and the affordability of the initiative. Both qualitative and quantitative details will dictate the assessment.

The University is moving towards a data strategy that will work to produce insight into key activities at the institution. One of the objectives is to have an accepted single version of truth for information, especially for information that marries two critical datasets.

Since this is still in progress, there will be a tiered level of acceptance to the strength for the source used in presenting quantitative information.

Official information has the highest acceptance where the sources include (1) the Data Portal in the Data & Statistics section of the IAR website, (2) published financial reports on Finance's website and BFPO website and (3) the Financial Reporting System (FRS).

The Financial Reporting System is the main data source for your submission template.

- All budget and actual spend
- Budget full time equivalent positions

The Data Portal shows:

- Student Enrolment (FTEs) based on official MTCU count date
- Post Convocation Degrees awarded
- Full Time Faculty Counts as reported to Statistics Canada on October 1st
- Retention rates as of November 1st each year and reported to CSRDE (Consortium for Student Retention Data Exchange)

- Graduation rates as of November 1st each year and reported to CSRDE
- Course Enrolment based on official MTCU count date

Unofficial information will have a secondary level of acceptance. The Committees will weigh this evidence less than official sources. However, it should not preclude your planning unit in providing key information that would be valuable to understanding your unit's operations. For instance, Hospitality provides the number of residence meal plans. This information is highly valuable and is specific to their activities. Although it doesn't fall under the same level of institutional wide scrutiny as applied to official student FTEs, it provides a guiding trend on activities that have a major impact to the success of the planning unit.

If you plan to use operationally based information as evidence, be cognizant on the effort versus the benefit in providing such information to support your submission. If you are not sure, please contact Zack Baker [zackb@uoguelph.ca](mailto:zackb@uoguelph.ca) or your BFPO support rep who will discuss the cost benefit of including/exploring the presentation of such information.

Please note that if you plan to use information from the Data Portal and need support, please contact [datarequest@uoguelph.ca](mailto:datarequest@uoguelph.ca).

## 3 Resourcing, Support and Timeline for a Successful Submission

---

### 3.1 Resourcing and Suggested Timeline

For Budget Planning Unit Leaders and Financial Lead Support, please make sure you have given yourself the right time to prepare for the submission. The below schedule highlights a suggested guiding post of dates for which you may or may not use. Each scheduling item listed is optional.

**It is the responsibility of the BPU leads to organize the planning approach, schedule and expectations.**

#### 3.1.1 Late Nov to Early Dec (Be familiar with your current budget)

- Meet with Direct Reports to describe the new process and templates (include BFPO rep as required).
- Ask Direct Reports to prepare a narrative of expected activities for the coming year.

- Financial Lead reviews key department budgets for the current year and ask department heads any questions on their budgets.

### 3.1.2 Mid Dec (Receive a draft of narrative for the coming year)

- Although this will not be a firm narrative from your direct reports, it will help guide your understanding of pending activities when considering the whole budget planning unit's picture.

### 3.1.3 Early Jan (Prepare budget plan form with FRS for 19/20)

- By January, fiscal 2019/2020 figures will be ready for your use and adjustment. If you haven't been in contact with your BFPO rep, they will contact you to determine progress and support requirements (please see below on what support is available from BFPO).
- Begin consideration for key budget requests

### 3.1.4 Mid to Late January (Review and revise plans/requests)

- By late January, you should be finalizing and planning to meet with the Vice-Provost/Provost/Vice-President to review the plan and requests.

### 3.1.5 Mid-February (Approval Signatures and Submission)

- Plan to get signatures and submit the budget plan package along with requests to [budget@uoguelph.ca](mailto:budget@uoguelph.ca). Carbon copy the Executive Director, Budget and Financial Planning ([zackb@uoguelph.ca](mailto:zackb@uoguelph.ca)).

## 3.2 Budget and Financial Planning (BFPO) Support

Each Budget planning unit has been assigned a representative to be the main contact and support from the Budget and Financial Planning Office.

### 3.2.1 Acceptable Support

- We encourage that the Budget Planning Unit Leads reach out to your BFPO Rep for an initial meeting. They may include department units as well. Ask for what they expect out of this first meeting (Will you require want another run through the orientation or will you be looking more in depth at the forms and guidelines?).

- The Rep will be the main point of contact for questions around the process, forms, scheduling and specialized concerns.
- Depending on the question, the Rep will transcribe the concern with a plan to respond in a reasonable time (1-2 working days).
- If you have not reached out to your Rep since an initial meeting, your Rep will most likely want to follow up mid-way through the process (Jan) to assess progress.
- A final meeting in late Jan/early Feb is optional.

### 3.2.2 What support doesn't look like

- The Rep will not fill out the form or write up any narrative.
- The Rep will not conduct any analysis or excel based work that should be led by the Finance Lead<sup>1</sup>.
- The Rep will only discuss your BPU's planning process. We can provide general statements that speak to best practices to ensure consistency in submission.

---

<sup>1</sup> Some exceptions will apply for Planning Units identified with Financial Lead gaps.

### 3.3 Assigned Budget Planning Unit BFPO Rep for 2019 2020

<b>Budget Planning Unit (BPU)</b>	<b>Lead (Presenters)</b>	<b>Lead Financial Support</b>	<b>BFPO Rep</b>
Agri-Food Partnership	Malcolm Campbell	Laurie Halfpenny-Mitchell	Michelle Curtis
Alumni Affairs & Development	Jason Moreton	Paul Hossie	Ryan MacLean
Athletics	Scott McRoberts	Rob Laird	Angeline Li-Malloy
Budget Planning Unit (BPU)	Lead (Presenters)	Lead Financial Support	BFPO Rep
College of Arts	Samantha Brennan	Brennen Reniers	Larry Shuh
College of Biological Science	Jonathan Newman	Vanessa Myers	Zack/Larry
College of Business & Economics	Julia Christensen Hughes	Heidi Huisman	Michelle Curtis
College of Engineering & Physical Sciences	Mary A Wells	Mark Torcoletti	Angeline Li-Malloy
College of Social & Applied Human Sciences	Gwen Chapman	Katherine Ferus	Ryan MacLean
Communications and Public Affairs	Lori Bona Hunt	Zack Baker	Ryan MacLean
Computing and Communication Services	Dave Whittle	Brigid Flucker	Zack/Larry
Co-op and Experiential Learning	Carrie Chassels	Rob Laird	Zack/Larry
Financial Services	Lori Kimball	Lori Kimball	Zack Baker
Graduate Studies	Ben Bradshaw	Pauline Sinclair	Michelle Curtis
Heritage	Lori Kimball	BFPO Support	Zack Baker
Hospitality	Ed Townsley	Kim Zinken	Ryan MacLean
Housing	Irene Thompson	Brennan Reniers	Zack/Larry
Human Resources	Martha Harley	BFPO Support	Ryan MacLean
Library	Barbara McDonald	Kelly Bertrand	Angeline Li-Malloy

Ontario Agricultural College	Rene Van Acker	Tina Goebel	Larry Shuh
Ontario Veterinary College	Jeffrey Wichtel	Judy Tack	Zack/Larry
Open Learning and Educational Support	Michelle Fach	Stephanie Ugrnov	Zack Baker
Physical Resources	Dan MacLachlan/ Claudia Runciman	Claudia Runciman	Angeline Li-Malloy
Provost Central Offices	Charlotte Yates	Zack Baker	Zack Baker
Registrar	Ray Darling	Manuela Sheehy	Michelle Curtis
Research Services	Malcolm Campbell	Laurie Halfpenny-Mitchell	Michelle Curtis
RIO, Operations & Communications	Malcolm Campbell	Laurie Halfpenny-Mitchell	Michelle Curtis
Student Affairs	Carrie Chassels	Rob Laird	Angeline Li-Malloy
VP External Central Offices	Mellissa MacDonald	Zack Baker	Ryan MacLean
VP FAR Central Offices	Don O' Leary	Lori Kimball	Zack Baker