

TO: Faculty Senate  
FROM: Robert S. Wolff, UPBC Chair (2016-2017)  
DATE: September 8, 2017

SUBJECT: Annual Report

The following memo and attachments summarize the work of the University Planning & Budget Committee during the 2016-2017 academic year. Robert Wolff (History), Richard Benfield (Geography), and Lisa Bigelow (Institutional Advancement) served respectively as chair, vice chair, and secretary. [The committee's agenda and minutes are available online](#). The UPBC met bi-weekly during the fall and spring semesters.

The major accomplishments of the committee are as follows:

- Completion of the annual review of budget proposals in February/March. This year, President Zulma Toro asked Fiscal Affairs to compile and publish online [historical expenditure information](#) that proved invaluable. These data continue to be updated on a regular basis and provide the campus community with data essential for strategic planning. The UPBC's recommendation to the President, and her response, are attached.
- At the request of President Toro, the UPBC reviewed the existing [Strategic Plan](#) in light of her stated goals: increase enrollment, enhance community engagement, and identify alternate sources of funding. To these, the committee suggested a fourth goal, maintain academic excellence, which she has accepted. The committee's report identifies objectives in the existing plan that are consistent with these goals, and suggests possible benchmarks. This report is also attached.
- Also at President Toro's request, the UPBC convened a series of focus groups drawn from faculty and staff to discuss the possibility of acquiring a downtown building. These conversations were facilitated by Raymond Tafrate (Criminology & Criminal Justice). The resulting report to the President is attached.

I look forward to discussion of our report.