

Chapter 5

Centralizing Integrated Long Range Planning and Budgeting

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EXECUTIVE SUMMARY

Upon relocation to a new, state-of-the-art, 260-acre campus outside of Cairo, Egypt, the American University in Cairo (AUC) sought to revamp its annual planning and budgeting processes to address several deficiencies. Primarily, long-range planning and annual budgeting were two independent events with little synchronization. This case study will detail the process and technical aspects of American University in Cairo's transition to a centralized and synchronized planning and budgeting cycle focused on determining appropriate workflows and leveraging database technologies to track planning initiatives throughout an approvals process. Readers will be able to weigh the drawbacks of centralization against the benefits of standardized budget review and planning.

ORGANIZATIONAL BACKGROUND

The American University in Cairo (AUC) is the Middle East's premier English-language university, serving more than 5,000 undergraduate and 1,000 postgraduate students. An independent and non-profit institution, American University in Cairo was founded in 1919 by Americans devoted to education and community service in the

Middle East. It is fully accredited in Egypt and the United States and offers a liberal arts curriculum intended to build a culture of leadership, lifelong learning, continuing education and service among its graduates.

Organizational Structure

More than 200 administrative and academic units make up American University in Cairo's organizational structure. Each is led by a director (in the

DOI: 10.4018/978-1-60960-583-4.ch005

case of administrative units) or department chair (in the case of academic units) who oversees the budget and operations of the given unit. This is the lowest level at which strategy and finances are formulated.

Generally, each administrative unit reports to an associate vice president and each academic unit to a dean. Each of these individuals is charged with formulating a strategic and financial plan for his or her set of units.

The next organizational level is the area head, to which all associate vice presidents or deans report. There are six areas: the President's area, Finance, Student Affairs, the Provost's area, Planning and Administration and Institutional Advancement. Area heads are the primary individuals charged with executing and synchronizing American University in Cairo's strategic and budgetary plans. They report directly to the President of the university, who, in turn, reports to the Board of Trustees.

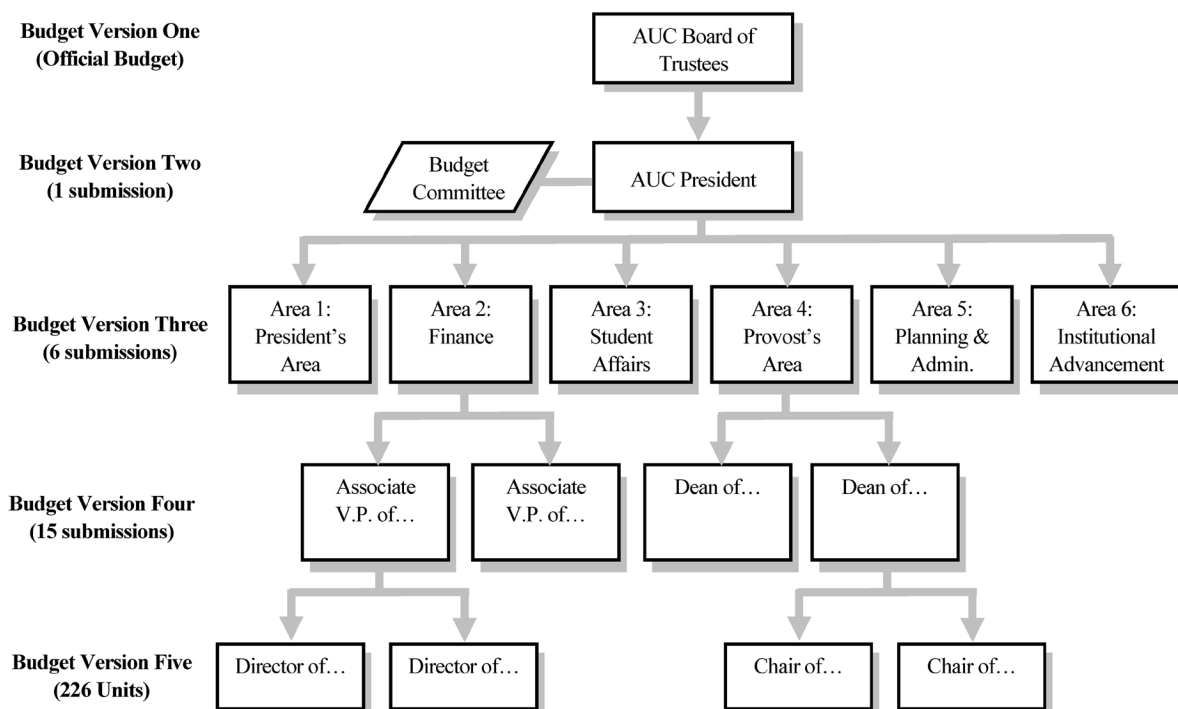
As one might expect, the bulk of American University in Cairo's planning and budgeting units are in the academic field. Table one provides a breakdown of the total number of offices per area.

The Organization of Yearly Budgeting

Planning and budgeting is an annual process that begins with submissions from individual units in November and culminates in the submission of a proposed budget for the coming year to the university's Board of Trustees in May. This is an iterative process in which unit proposals are reviewed and endorsed by successive administrative levels and are finally examined by the university's budget committee before submission to the Board of Trustees.

The process begins with the issuance of a memorandum from the Vice President for Planning and Administration and the Vice President for

Figure 1. Partial organizational chart for the American University in Cairo (AUC)



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