2005-2007 Biennial Budget Process

Operating Budget

The Department of Administrative Services established requirements for request submission.

Request Requirement

▶ Current Service Level (CSL): Funding necessary to continue authorized programs.
▶ Policy packages: specific initiatives to address continuing or new funding beyond CSL.
▶ Current Services developed and presented to Board at July meeting.

Policy Packages

▶ Primary focus for Board decision-making.
▶ Each initiative supported by the Board will be translated into one or more policy packages.
▶ Committee initiatives should be conveyed in draft form and include a description, connection to Governor’s and Board’s priorities, expected outcomes, performance indicators, and funding requirements.
▶ The drafts should be brief and available for full Board review at the May and June meetings.

Budget reduction proposal: all State agencies are required (by statute) to submit 10 percent budget reduction proposals.

Legislative concepts may be necessary if there are proposed changes to existing legislation.

Capital Construction Budget

- Request includes projected capital projects spanning three biennia – 2005-2011.
- Request is focused through three program goals: quality facilities, enrollment growth, and program needs.
- Board approves request for all capital projects regardless of fund source.
- Board will approve Biennial Request and three biennia plan at the July meeting.
- Consideration is being given to a capital request that addresses a significant deferred maintenance backlog.
2005-2007 Budget Development Schedule

Key Dates for the Board*

March 5 ........... Board discussion of Tuition and Fees

April 9 ............ Board discussion of Tuition and Fees

May 7 .............. Board review of draft policy initiatives

June 4 ............. Board approval of 2004-05 Tuition and Fees
  Board review of Capital project proposals
  Board discussion of draft policy packages

July 16 ............ Board approval of biennial Operating and Capital budget
  requests

September 1 .... Submit 2005-2007 Biennial Request to DAS

* During the year, the Board will receive periodic status reports on the review of the Resource Allocation Model.
Policy Package Development
Program changes and policy initiatives that require an increase in the Agency Request Budget are submitted to the Department of Administrative Services (DAS) as Policy Packages. Policy Package requests are due to the OUS Budget Office by April 22, 2004, for inclusion in the May 2004 Board docket. Board approval of the Agency Request Budget is scheduled for July 2004.

The initial request should be a 1-2 page concept paper that includes the elements listed below. Additional supporting information will be required for Policy Packages that are identified by the Board as high priorities.

Title: Include a descriptive title.

Policy Initiative(s): Identify which of the Governor’s/Board’s key policy initiatives are supported by this Policy Package.

Description: Describe the program, project, or initiative being proposed.
► Is it a new program or the expansion, reduction, or elimination of a program?
► Does it involve partnerships with other agencies?
► Is the funding request linked to a Legislative Concept (an initiative that requires changes in legislation)?

Expected Outcomes: Describe the chosen outcomes that you expect to achieve and the links with OUS initiatives.

Performance Indicators: Identify performance indicators that will measure progress to achieving expected outcomes. Current OUS performance indicators are available on the OUS website at http://www.ous.edu/monitoring_perf/monitoring_perf_home.html. If new performance measures are under consideration, contact Susan Weeks at (541) 346-5743.

Budget Outline: Develop a budget that includes:
► Positions requested—position title, number of FTE, salary dollars, other payroll costs
► Services and Supplies—dollar amount
► Capital Outlay—dollar amount
► Any technology expenses should be identified separately in each category
► Identify proposed expenses for 2005-2007, including one-time and ongoing costs
► Identify any phase-in costs (i.e., costs that will increase in future biennia) or phase-outs (costs that will decrease in the future)

For assistance, contact Nancy Heiligman at (541) 346-5759.