

Strategic Budget Process

Ohio University

November 20, 2009

Phase 1: December 1 – February 1

Phase 1 outlines a strategic process to reduce planning unit budgets to address a shortfall in FY 2010 and to lay the groundwork for meeting an anticipated shortfall in FY 2011. Instead of across-the-board cuts, recommendations are to be formulated that will result in strategic reallocation of base-budget resources according to designated strategic priorities.

In partnership with entities such as the Budget Planning Council (BPC), constituent senates, the deans, and the executive staff, the university will find a way to meet budget shortfalls across multiple years and to establish a means of finding additional resources to invest in university academic priorities.

The strategic budget process will include the following stages and timeline:

Completed by February 1:

1. Planning units, constituent senates, and the Budget Planning Council will:
 - a. Suggest realignments that would result in cost savings and strengthen quality, productivity and efficiency.
 - b. Identify joint initiatives and promising activities that with a short or mid-term investment could become self-sustaining and generate new, durable sources of revenue for the university.
 - c. Identify cost savings and revenue enhancements.
2. The Athens and regional campus communities will be asked to propose, via a web site, ideas for saving costs and generating revenues.
3. Planning units will develop 5% and 10% base-budget reduction scenarios guided by a set of strategic priorities.* While each unit is asked to develop a 5% and 10% base-budget reduction scenario, the actual reductions will be differentially assigned based on a set of strategic priorities. The range of reductions will be from 0% to 10%. Planning unit scenarios should be sent to the Office of Budget Planning and Analysis by February 1.

* *The only exempted funds are those used for fee waivers and centrally-funded scholarships .*

Phase 2—February 1 – March 27

1. The President, the Executive Vice President and Provost, and the Interim Senior Vice President for Finance and Administration will draft, by February 13, a set of recommendations based on planning unit scenarios and input from the campuses.
2. Deans, executive staff, constituent groups, BPC and members of campus communities will review the draft recommendations. They will provide comment on whether the recommendations are sufficient to position the university to advance its mission of undergraduate and graduate education and meet immediate budget needs while holding to established constraints.
3. A summary of the comments on the draft recommendations will be shared by March 13 with the President and will be made available to the campuses.
4. The President will produce final recommendations by March 27 and share them with the university community.
5. Final recommendations will be presented to the Board of Trustees for endorsement.

Due Date	Activity
February 1	5% & 10% planning unit scenarios
February 1	Recommendations from planning units, constituent senates, and BPC on cost savings and revenue generation.
February 1	Input from web site compiled
February 13	Draft set of recommendations compiled and shared
March 13	Responses to draft recommendations due
March 27	President produces and shares final set of recommendations with the university community