

UPDATE ON THE BUDGET PROCESS

by Dr. Elizabeth Stroble, Senior Vice President and Provost

In April, we will present to the Board of Trustees a budget recommendation for fiscal year 2006 that reflects the collective work and input of each college and division. The priorities that will be expressed in the proposed budget have been developed over the last nine months using a process that was reworked in 2004 to be more inclusive and transparent. Today, we are about three-fourths of the way through the process — a good point to pause to answer some of the questions you may have about the process and where we go from here.

What has happened in the last few months?

A series of budget hearings was held in January before the Budget Hearing Committee, at which time each dean and vice president presented a unit plan for his or her area. Some of the questions asked of the deans and VPs were:

- What are the main objectives of your unit, and how do you measure success? How do you prioritize these objectives?
- What programs have received priority for enhanced resources or funding in the last two fiscal years? What are your priority academic programs? Why are they priority programs?
- What are the services that your unit provides and to which populations (students, faculty, staff, etc.)? How do you prioritize these services?
- Do you see needs and demands for services that your unit cannot currently meet? If so, what are they, and how do they relate to the university's mission? What one thing do you wish you could do differently to improve your effectiveness but have not had the opportunity, time or resources to do?
- How do you review and evaluate your department's yearly performance? Please share data you have that measure success.
- What will you do to increase revenue? How do you support increased enrollment and retention of students?
- How will you reallocate current resources in strategic ways? What programs have you eliminated or reduced in size in the last two fiscal years and what have been your actual realized savings? Indicate which, if any, of your programs are underproductive, inactive or unnecessarily duplicative of other programs in northeast Ohio?
- In the last three to five fiscal years, what three factors have determined the expenditures, or changes in expenditures, in your unit? What has been the impact?

Who were the members of the Budget Hearing Committee?

I served on the committee, as did:

- Dr. Luis Proenza, president;
- Mr. Roy Ray, vice president for business and finance;
- Dr. Chand Midha, associate provost for academic and financial affairs;
- Ms. Sabrina Andrews, director of institutional research;
- Ms. Candace Campbell Jackson, assistant to the president;
- Mr. Brian Davis, associate vice president for business and finance;
- Ms. Amy Gilliland, director, office of resource analysis and budget;
- Mrs. Rose Marie Konet, manager, computer-based assessment and evaluation;
- Mr. Brett Riebau, interim controller; and
- Dr. Daniel Sheffer, associate professor, biomedical engineering

Andrews, Davis, Gilliland, Konet, Midha, Sheffer and I are members of the Operations Advisory Committee, which devised the budget process with input from vice presidents, the Council of Deans and the Executive Committee of the Faculty Senate. (A diagram of the budget process is [online](#).)

How will the committee use the information it has compiled to fashion a final budget recommendation for the Board?

In recent days, the Budget Hearing Committee has been working with the deans and vice presidents to clarify points in the unit plans and to gather supporting information.

This information will be considered by members of the Budget Hearing Committee, and they will provide input to Stroble and Ray who will then consider with the president various scenarios that can be presented to the Board of Trustees for their review and approval.

What are some of the challenges the committee is facing?

The Ohio Board of Regents has set an April 30 deadline for university budgets to be submitted. This will require budget committees here and across Ohio to make assumptions regarding state share of instruction and health care costs. As a result, the scenarios that will be developed must pose different assumptions about various percentages that campus units can be assured of in their approved operational budgets for FY2006, with the balance dependent on state funding, health care costs and institutional reallocations to take advantage of opportunities and any unforeseen contingencies.

When the budget is final, the committee will step back and take measure of the new budget process, asking campus groups whether we have succeeded in making it more inclusive and transparent. When more specific information is available about this review process and other aspects of the budget process, that information will be shared as a follow-up to this message.