

DATE: 4 APRIL 2019
TO: WESTERN OREGON UNIVERSITY BOARD OF TRUSTEES:
FINANCE & ADMINISTRATION COMMITTEE
FROM: UNIVERSITY BUDGET ADVISORY COMMITTEE
RE: FY20 UBAC REVIEW

OVERVIEW

On October 17th, the campus community was asked to submit ideas for budget initiatives for Fiscal Year 20 (FY20). By November 19th, students, faculty, and staff submitted a total of 76 Phase-1 initiative proposals. In January, the University Budget Advisory Committee finished reviewing the proposals, organized them by category, and sent our recommendation to President Fuller.

The full list of Phase-1 proposals was reviewed by Dr. Fuller and his cabinet, and 14 proposals were selected for further development in Phase-2. These Phase-2 budget proposals were presented at a pair of joint meetings with UBAC, President Fuller, and his cabinet on March 14th and 15th which was open to the campus community. The UBAC then met and discussed the 14 proposals in detail.

We ranked the Phase-2 proposals as tier one (most important), tier two, and tier three based on the lenses of student retention, recruitment, and affordability that had been identified at the beginning of this budgeting cycle. We submitted our recommendations to President Fuller at the end of March and look forward to his decisions.

NEXT STEPS

Now that the UBAC has completed our proposal collection and evaluation work for this cycle, we are looking for ways to improve the process before the FY21 cycle begins. The committee has already identified a number of strengths and weaknesses that arose over the FY20 cycle.

The UBAC plans to solicit feedback from everyone who submitted a budget proposal for FY20 in order to identify improvements that can be made to the process. We have already received some valuable recommendations from proposal submitters and campus members who wanted to take part in the process. Among the UBAC's goals for the start of the FY21 cycle are the following:

- Develop more thorough instructions for submitting proposals, especially at Phase-1
- Communicate the planned schedule better, and give status updates to campus
- Create guidelines for creating an assessment plan, which is required as a part of Phase-2
- Enhance the submission forms that were created for this year's process
- Improve the availability of Phase-2 presentations to campus

The process this year was significantly improved from the past year. This year we used a two phase process with the goal of lowering the amount of effort to submit an idea, while still allowing the best ideas to be thoroughly developed. We also opened the Phase-1 submissions to campus-at-large, and had Phase-2 proposals and presentations open and visible to the community. The committee is pleased with the increased collaboration and transparency that these changes have brought, and have received positive feedback about this year's process.