

Office of Planning and Budgets

Budget Planning and Analysis

Fiscal Officers Update

April 28, 2020

Agenda

- Planning Environment and Timeline
- Carryforward
- Summer Instructional Administration
- RFA, OCCI, RBI Data Availability
- Tuition/Fee Rate Review and Update
- Executive Management/Dean's Pay Reduction Savings
- Spring Budget Planning - PA Application
- Other Notes and Updates

Planning Environment & Timeline

Impressive Resilience

- “Overnight” virtualization of curriculum and instructional delivery
- “Overnight” conversion of administrative support to virtual/remote delivery
- Strong advocacy and support of “Team MSU” in face of disruption
- Many operating adjustments facilitated in units
- Executive pay reduction

Next Steps

- Summer instructional delivery (mostly) online
 - Numerous new financial channels to support expansion
- Provide unit flexibility as we move into year-end (carryforward)

Planning Environment & Timeline

- Carefully monitor and assess changing dynamics for FY21
 - Enrollment and enrollment distribution
 - Tuition and fee rate freeze
 - Hiring chill
 - State appropriations
 - To name a few, many others
- Allocation review ongoing (mea culpa)
- RFA/RBI/OCCI processes on schedule
- Modified spring budget planning process available soon
- New application will aid in expediting budget request process
- Currently, “typical” board action and budget planning process this summer

Budget Calendar – Upcoming Dates to Note

- **May 4:** OOI requests due to OPB
- **May 5, 1:00-3:00:** BBR and SWA Training
 - see calendar for Zoom information
- **May 12, 1:00-3:00:** FEE, RBI, OCC and RFA Training
 - see calendar for Zoom information
- **May 12:** FEE, RBI, OCC and RFA applications available
- **June 4, 2:30-4:30:** BCN and UBP Training
 - see calendar for Zoom information

FY21 Carryforward

- To increase unit flexibility, 10% carryforward parameter authorized for balances in GA, GC, GD accounts
 - Memo request for balances in excess of 10% similar to previous cycles
- Other GF sub-funds unchanged – continues as automatic for GS, GE, GH, GT, GL, others
- Process and Timeline Unchanged – continues use of PA application, calendar indicates dates – possibility of expedited approvals of GA/GC/GD amounts
- Ongoing review of use of funds constraints

Summer Programming

- Most summer programming to be conducted online
 - APUE working with Associate Deans to facilitate curricular changes
- Instructional cost support facilitated through Lisa Rahall in Academic Services
 - As with previous periods, any course receiving instructional cost support through Academic Services will not be eligible for OCCI consideration
- FY18 cap remains in force for OCCI assessment
- New professional development channels available through the HUB:
 - Online education workshop, course development, quality review
- Professional development funding allocated monthly, 10% overhead allocated at conclusion of summer programming

Fee, RBI, OCC and RFA Application Updates

- Training and application available for use May 12
- Applications updated to better reflect detail and complexity of programming
 - Majors and courses detailed (RBI, FEE)
 - Improved rate input fields (RBI)
 - Streamlined true-up and transactional process (RBI)
 - Instructional faculty better detailed (RBI, OCCI)
 - Additional detail for special allocations (OCCI)
 - Improved reporting for RBI/OCCI prioritization (OCCI)
 - Improved articulation between FEE and RBI

Tuition and Fee Rates

- Freeze announced by President and Provost
- Applies across-the-board, few, if any exceptions
- May need to conduct “expedited” rate review process for RBI/market-rate programs to assure accuracy, capture rates for new programs
- Rate projections updated in RBI and OCCl to reflect freeze

Executive Pay Reduction

- President Stanley announced a pay reduction for Executive Management and Deans
 - Reduction ranges from 2%-7% based on salary, 10% for President Stanley
- Effective May 1 through June 30
- Academic Human Resources notifying impacted individuals, HR completing individual pay adjustment actions
- OPB will be following up with MAU fiscal officers to facilitate transfer of savings

Spring Budget Planning - Introduction

- New Planning Analytics application that –
 - Replaces static and labor intensive Excel submissions
 - Automates and streamlines request process for budget allocations
 - Improves communication between MAUs and OPB
 - Enables OPB to provide additional reporting per MAUs requests over time
 - User friendly interface and functionality
- MAU fiscal officers already established within the application
- Dean/VP roles available upon request
- Contact Bill Buddle in OPB to access the application, remediations available overnight

Notes and Other Questions

- **Share anything of concern**
 - Available on Teams, email, etc.
 - Use the Budget Officers channel for questions to the group
 - OPB will share pertinent information as soon as available
- **Responses to existing allocation review**
 - On top of OPB's list, will respond to each request
- **Review any outstanding items as we move towards year-end**
- **Extensive revisions coming to OPB website and PA training materials**

Office of Planning and Budgets

Budget Planning and Analysis

Fiscal Officers Update

April 28, 2020