FY23 BUDGET PROCESS INSTRUCTIONS

**ASUO Departments Finance Committee**

# Welcome to the FY23 Budget Process

Although the academic year has just begun, ASUO Officers have begun to work on their Incidental Fee Budget Recommendation for FY23, which covers the period July 1, 2022 – June 30, 2023.

The Departments Finance Committee (DFC) oversees the budgets for 17 UO Department-Based Programs. These instructions are specific to these department-based programs.

* If you are an ASUO-Recognized Student Organization or Contract Service Vendor, these instructions do not pertain to you. Go to: <https://asuo.uoregon.edu/budget>.

# FY23 Process and Links

This year’s process includes FOUR steps:

1. **Benchmark Request** form due October 8, 2021. Find it here:  [https://uoregon.campuslabs.com/engage/submitter/form/start/501602](%20https%3A//uoregon.campuslabs.com/engage/submitter/form/start/501602%20)
2. **Meet with an DFC Member**, preferably your tag, at least once between October 8 and November 5. This electronic resource identifies who they are and their email: <https://docs.google.com/spreadsheets/d/1Lv6Qag_fVtIpUmC_kAx1WdnGxP1y3bTJKApPuUYavok/edit#gid=757058604>
3. **Budget Request Form** due by 5pm on November 6, 2020. Beginning Oct 14, find it here: <https://uoregon.campuslabs.com/engage/submitter/form/start/501603>
4. **Schedule and attend a budget hearing** in November or January. Your tag will email you to schedule.

To access information about this year’s budget process information, timeline, and *Current Service Level Memo*, please see <https://asuo.uoregon.edu/budget>.

If you need to reach the committee, please email us at dfc@uoregon.edu.

# Changes Since Last Year

### The Benchmark Request form is less detailed than the prior year.

This form continues to collect information about whether department-based programs anticipate changes in cost to continue the same level of I-Fee funded services in FY23, a brief description of any cost changes, and an estimate of the associated cost increase or decrease. It also requests department-based programs to identify whether they intend to change the types of I-Fee funded services and programs in the next fiscal year, and if so, to briefly describe them and estimate the cost increase or decrease associated with the changes. Submitted Benchmark Request Forms will be marked as “received” and no longer marked as approve or deny. A Microsoft Word document of the questions is available upon request.

### The Budget Request Form collects more detailed information than the prior year.

Some of the questions have changed and some have remained the same. We again request that you submit the budget request form via Engage and upload a copy of your budget request in the excel spreadsheet provided to you via email from your tag. All Departments shall submit a line-item budget and be able to produce records upon request showing appropriate use of funds to the Committee. Submitted Benchmark Request Forms will be voted on and marked as approved with the final approved amount after budget hearing or will be denied and sent back for revisions. A Microsoft Word document of the questions is available upon request.

According to DFC’s Bylaws, the committee shall not allocate budget requests to any Department that does not demonstrate full financial disclosure. Department-based programs shall disclose all financial resources, including donations from any source, and any other information which is reasonably required to give an accurate description of the department-based program’s resources. Such disclosure shall include, but is not limited to: UO Department Accounts, UO Foundation Accounts, Fundraising accounts (e.g. grants), charges for services and related income, donations and gifts.

If any Department fails to submit an acceptable budget on time without contacting the Chair, their budget shall not be heard and they will not receive funding for the following year. Exceptions will be granted at the discretion of the Chair or a majority of the Committee.

1. Each Department will be guaranteed minimum thirty (30) minutes of presentation time before budget deliberations, unless the Chair and Department director agree to another period of time. Extensions may be granted at the discretion of the Committee and Chair.
	1. Any Department may file an appeal of any Committee decision on any line-item amount within their budget. Appellants must follow the published appeals process.

# At Your Hearing

During the hearing and throughout the process, DFC Members will rely on viewpoint-neutral factors when making budget recommendations. According to DFC’s Bylaws, past and current year’s fiscal accountability, ASUO Executive Recommendations, adherence to all rules of the ASUO, State of Oregon, and Federal guidelines, regardless of leadership or member turnover, will be considered as a basis for continued funding levels. Fiscal accountability is defined as how well the group has used the money allocated to them in past and current years. Budgeting and spending Information may be provided by ASUO Finance upon request. For FY23, DFC voted on the additional funding factors in establishing their budget recommendations for departments:

* COVID-19 Operations
* History of Requests/Spending
* Carryforward Amount
* Availability of Program Services for Student Body
* Fiscal Responsibilities

Please be prepared to speak to these factors at your scheduled DFC hearing. Prior to the hearing, please discuss these factors with your tag as well as what to expect at the hearing and any potential increases/decreases to your budget.

According to DFC’s Bylaws, each department will be guaranteed minimum thirty (30) minutes of presentation time before budget deliberations, unless the Chair and Department director agree to another period of time. Extensions may be granted at the discretion of the Committee and Chair.

# After Your Hearing

According to DFC’s Bylaws, any department may file an appeal of any committee decision on any line-item amount within their budget. Appellants must follow the published appeals process and contact DFC for questions.

Decisions made at the DFC hearing indicate the committee’s recommended course of action only. DFC’s recommendations may be revised at any stage in the ASUO budget process.

* At the DFC hearing, the line items listed in your I-Fee budget and associated costs will be discussed and potentially modified by the DFC. If your department-based program receives funding, the committee’s determination of the total budget will become your recommended I-Fee budget.
* DFC’s recommendations move to the Student Senate for debate, discussion, and consideration at a hearing in January. Changes may be made to DFC’s recommendation regarding your contract at the Student Senate hearing.
* Ultimately, Student Senate will finalize each finance committee’s recommendations through the creation of the proposed incidental fund budget.
* Senate’s proposed budget then moves to the Executive Branch, for approval or veto by the ASUO President.
* Once the ASUO President has approved the proposed incidental fund budget, it moves to the UO President who determines whether it will be heard by the Board of Trustees for consideration at their March hearing.

# Final Action: Board of Trustee’s Approval

The incidental fee budget – including your budget – will become final after the Board of Trustee’s vote to approve it.

After the Board of Trustees acts on the Incidental Fee Budget, your beginning budget will be entered into Banner via in accordance with the UO’s timeline set by Budget Resources and Processes (BRP). Beginning Budget entries in Banner begin in March and are available prior to the end of the fiscal year (June 30).

# Sneak Peek: Behind the Scenes

Student Government Officers are UO students balancing their leadership responsibilities with their educational pursuits. From day one of Fall Term, they work with their advisor and colleagues to increase their understanding of financial processes and to establish financial benchmarks and goals that will guide their budget decisions. They will devote at least six months of their personal time to this process, and by early February, they will have practiced and honed their skills in several key areas which are currently sought by employers:

**Leadership**. Leverage the strength of others to achieve common goals. Practice organizing, prioritizing, and delegation. Use interpersonal skills to coach and develop teammates and empathy to guide and motivate.

**Critical Thinking.** Review and interpret facts and data in order to analyze issues of importance to the committee, make decisions, and work collectively to overcome problems.

**Communication**. Through public speaking and writing, practice articulating thoughts and ideas in a clear and effective manner.

**Teamwork**. Build collaborative relationships through shared endeavors while negotiating and managing conflict.