

Instructions for Completing the Revised Operating Budget (OB) Form I

The OB Form I has been developed to capture data needed to justify a budget issue's relationship to one of the Board's Strategic Plan goals.

Although an issue may cover multiple goals, only one corresponding OB Form I (I-a, I-b, I-c or I-d) should be completed for the primary goal that this issue is addressing. The data requested on each OB Form I is slightly different for each Board goal. There should be only one sequential priority list of all issues for each university (USF-Sarasota/Manatee, USF-St. Petersburg, UF-IFAS, UF-HSC, USF-HSC and FSU-MS may have a priority list separate from the university) for all issues approved by the Boards of Trustees.

For each budget issue determine which Board goal the university is trying to address and complete the appropriate Form I in its entirety.

1. Form I-a: **Access to and Production of Degrees**
2. Form I-b: **Meeting Statewide Professional and Workforce Needs**
3. Form I-c: **Building World-class Academic Programs and Research Capacity**
4. Form I-d: **Meeting Community Needs and Fulfilling Unique Institutional Responsibilities**

**State University System
Educational and General
2007-2008 Legislative Operating Budget Issue
Form I-a**

Strategic Planning Goal/Objective: Access to and Production of Degrees (Examples of issues that may be included under this goal would be new enrollment growth, outreach, recruitment, financial aid, academic tracking, advising, etc.)

University:	
Issue Title:	
University Priority Number:	
Date Approved by Board of Trustees:	

- I. **Needs Statement** (*What need will be addressed with the provision of funds for this issue?*):

- II. **Justification**
 - A. **Description of service or program to be provided:** (*Include whether this is a new or expanded service/program. If expanded, what has been accomplished with the current service/program?*)

 - B. **Description of current university initiatives, and their resources, that will strengthen the provision of this service/program:**

 - C. **Description of outcome anticipated:** (*Be specific. For example, if this issue focuses on improving retention rates, indicate the current retention rate and the expected increase in the retention rate. In addition, identify the following, if applicable.*)
 - i. Number of Headcount Students receiving services or participating in the program by year, for the next five years:
 - ii. Number of FTE Students receiving services or participating in the program by year for the next five years:
 - iii. Additional degrees, if any, produced as a result of this initiative (*Indicate the additional number of Bachelor, Master, Doctoral & Professional degrees produced by school year.*)
 - iv. Other outcomes:

III. Budget Request for 2007-08:

		2006-07 Budget for Issue (A)	2007-08 State Funds Requested (B)	2007-08 Anticipated Reallocation (C)	Total Budget for Issue (D)
a.	Recurring Funds:	\$	\$	\$	\$
b.	Non-recurring Funds:	\$	\$	\$	\$
c.	Total:	\$	\$	\$	\$

- A. Identify 2006-07 funds (if not E&G funds, provide the source of the funds) that will be used to initiate this program.
- B. Identify the amount of funds requested for 2007-08.
- C. Identify existing programs from which funds will be reallocated, if applicable (include for example, salaries from reallocated or dedicated personnel).
- D. If this is a multi-year request, identify the incremental funds needed from the state for each future year, by year, for a maximum of five years.

IV. Facilities:

- A. Does this issue require an expansion or construction of a facility?
- B. If yes, is the project identified on the Capital Improvement List? If so, identify the project, fiscal amount, year requested and priority number.

	Facility Project Title	Fiscal Year	Amount Requested
1.			
2.			

**State University System
Educational and General
2007-2008 Legislative Operating Budget Issue
Form I-b**

Strategic Planning Goal/Objective: Meeting Statewide Professional and Workforce Needs *(Examples of issues that may be included under this goal would be new or expanded targeted and/or educated citizenry / workforce programs, recruitment or retention of students.)*

University:	
Issue Title:	
University Priority Number:	
Date Approved by Board of Trustees:	

- I. **Needs Statement:** *(What need will be addressed with the provision of funds for this issue? Identify the specific degree, and whether it is a targeted or educated citizenry / workforce program.)*

- II. **Justification**
 - A. **Description of service or program to be provided:** *(Include whether this is a new or expanded service/program. If expanded, what has been accomplished with the current service/program?)*

 - B. **Description of current university initiatives, and their resources, that will strengthen the provision of this service/program:**

 - C. **Description of outcome anticipated:** *(Be specific. For example, if this issue focuses on producing more teachers, indicate the number of current teachers produced and the expected increase in the number of teachers produced and by what date. In addition, identify the following, if applicable.)*
 - i. Number of Headcount Students receiving services or participating in the program by year for the next five years:
 - ii. Number of FTE Students receiving services or participating in the program by year for the next five years:
 - iii. Additional degrees, if any, produced as a result of this initiative *(Indicate the additional number of Bachelor, Master, Doctoral & Professional degrees produced by school year.)*

iv. Other outcomes:

III. Budget Request for 2007-08:

		2006-07 Budget for Issue (A)	2007-08 State Funds Requested (B)	2007-08 Anticipated Reallocation (C)	Total Budget for Issue (D)
a.	Recurring Funds:	\$	\$	\$	\$
b.	Non-recurring Funds:	\$	\$	\$	\$
c.	Total:	\$	\$	\$	\$

- A. Identify 2006-07 funds (if not E&G funds, provide the source of the funds) that will be used to initiate this program.
- B. Identify the amount of funds requested for 2007-08.
- C. Identify existing programs from which funds will be reallocated, if applicable (include for example, salaries from reallocated or dedicated personnel).
- D. If this is a multi-year request, identify the incremental funds needed from the state for each future year, by year, for a maximum of five years.

Identify the program’s current cost per student credit hour (SCH) using the 2004-2005 expenditure analysis:

IV. Facilities:

- A. Does this issue require an expansion or construction of a facility?
- B. If yes, is the project identified on the Capital Improvement List? If so, identify the project, fiscal amount, year requested and priority number.

	Facility Project Title	Fiscal Year	Amount Requested
1.			
2.			

**State University System
Educational and General
2007-2008 Legislative Operating Budget Issue
Form I-c**

Strategic Planning Goal/Objective: Building World-class Academic Programs and Research Capacity *(Examples of issues that may be included under this goal would be new and/or expanded research initiatives, enhancements of certain academic programs or program implementation / expansion of non-targeted programs.)*

University:	
Issue Title:	
University Priority Number:	
Date Approved by Board of Trustees:	

- I. **Needs Statement:** *(What need will be addressed with the provision of funds for this issue?)*

- II. **Justification**
 - A. **Description of service or program to be provided:** *(Include whether this is a new or expanded service/program. If expanded, what has been accomplished with the current service/program?)*

 - B. **Description of current university initiatives, and their resources, that will strengthen the provision of this service/program:**

 - C. **Description of outcome anticipated** *(Be specific. For example, estimate federal, private or other research dollars that may be received or other measurable forms of return on investment and by what years.)*

 - D. **Additional information to justify request:**

III. Budget Request for 2007-08:

		2006-07 Budget for Issue (A)	2007-08 State Funds Requested (B)	2007-08 Anticipated Reallocation (C)	Total Budget for Issue (D)
a.	Recurring Funds:	\$	\$	\$	\$
b.	Non-recurring Funds:	\$	\$	\$	\$
c.	Total:	\$	\$	\$	\$

- A. Identify 2006-07 funds (if not E&G funds, provide the source of the funds) that will be used to initiate this program.
- B. Identify the amount of funds requested for 2007-08.
- C. Identify existing programs from which funds will be reallocated, if applicable (include for example, salaries from reallocated or dedicated personnel).
- D. If this is a multi-year request, identify the incremental funds needed from the state for each future year, by year, for a maximum of five years.

IV. Facilities:

- A. Does this issue require an expansion or construction of a facility?
- B. If yes, is the project identified on the Capital Improvement List? If so, identify the project, fiscal amount, year requested and priority number.

	Facility Project Title	Fiscal Year	Amount Requested
1.			
2.			

**State University System
Educational and General
2007-2008 Legislative Operating Budget Issue
Form I-d**

Strategic Planning Goal/Objective: Meeting Community Needs and Fulfilling Unique Institutional Responsibilities *(Examples could include issues important to a regional area or specific to an institution's mission.)*

University:	
Issue Title:	
University Priority Number:	
Date Approved by Board of Trustees:	

I. **Needs Statement:** *(What need will be addressed with the provision of funds for this issue?)*

II. **Justification**

A. **Description of service or program to be provided:** *(Include whether this is a new or expanded initiative. If expanded, what has been accomplished with the current service/program?)*

B. **Description of current university initiatives, and their resources, that will strengthen the provision of this service/program:**

a. **Description of outcome anticipated** *(Be specific).*

b. **Additional information to justify request:**

III. **Budget Request for 2007-08:**

		2006-07 Budget for Issue (A)	2007-08 State Funds Requested (B)	2007-08 Anticipated Reallocation (C)	Total Budget for Issue (D)
a.	Recurring Funds:	\$	\$	\$	\$
b.	Non-recurring Funds:	\$	\$	\$	\$
c.	Total:	\$	\$	\$	\$

- A. Identify 2006-07 funds (if not E&G funds, provide the source of the funds) that will be used to initiate this program.
- B. Identify the amount of funds requested for 2007-08.
- C. Identify existing programs from which funds will be reallocated, if applicable (include for example, salaries from reallocated or dedicated personnel).
- D. If this is a multi-year request, identify the incremental funds needed from the state for each future year, by year, for a maximum of five years.

IV. Facilities:

- A. Does this issue require an expansion or construction of a facility?

- B. If yes, is the project identified on the Capital Improvement List? If so, identify the project, fiscal amount, year requested and priority number.

	Facility Project Title	Fiscal Year	Amount Requested
1.			
2.			