

Date: January 11, 2016

To: Deans, Directors, and Department Heads

From: Eric Yahnke, Vice President for Finance & Administration

Subject: Fiscal Year 2016-17 Budget Process

Despite continued uncertainty in State funding for Higher Education, future salary and benefits costs, and enrollment for the coming year we begin preparing the FY2017 budget.

In an effort to streamline the budget development process, FY2017 budget worksheets are available via your Google Drive. This is a secure, efficient method which will give you the ability to edit worksheets directly, share amongst members of your division/department, as well as receive direct assistance when needed (without the hassle of multiple emails and attached files).

These documents represent your formal budget request and will be used for budget hearings expected to begin March 7, 2016. To that end, please review and update your budget worksheets.

Budget worksheets will be due and “locked” on March 1, 2016 at 5pm. For a complete calendar of important dates related to this process, please visit the budget website (<http://www.wou.edu/budget>) and hover over “Resources.”

The budget worksheets are based from the FY2016 initial budget and updated for known organizational and position changes to date.

1) Personnel budgets:

- a. **All personnel budgets** - FTE may be redistributed within the current employee class to a different department. Requests for new positions or increased FTE must be entered on the “Budget Requests” form included with your worksheets. **Please limit any new budget requests to your top three (3) proposals for this process.**
- b. **Tenure track** positions have been updated with expected promotions, sabbaticals, and vacancies that may or may not be filled. Salary and OPE budget amounts are estimates which do not reflect rates currently in negotiation. Subsequent budget changes will be made once a new contract is ratified.
- c. **Non-tenure track** budgets are based on projected FY17 enrollments. Please review and make note of any changes your department feels necessary to reflect needs for the coming year in light of expected enrollment and course offerings. These budgets will be reviewed and adjusted once FY16 actual and FY17 projected enrollment is known.
- d. **Administrative and support staff** salary and OPE amounts are estimates and do not reflect anticipated salary increases. These budget amounts will be adjusted and finalized once actual salary rates are known.

- 2) **S&S** - Please feel free to redistribute S&S amounts within your organizations to best fit your strategic plans but do not exceed the total provided at the bottom of your worksheets. If the total S&S for department figure is highlighted in red, your S&S has exceeded the allowable allocation. Requests for an increase in S&S budgets must be made using the “Budget Requests” form included with the worksheets. **Please limit any new budget requests to your top three (3) proposals for this process.**

For this process, please limit any new budget requests to your top three (3) priority proposals for the next fiscal year.

Current and historic detail for your budgets can be found with the Banner form FWIBDST – Organization Budget Status or Banner reports such as FZRCROS, FGRODTA and FGRODTH.

Please feel free to contact Brandon Neish (neishb@wou.edu) or Eric Yahnke (yahnkee@wou.edu) with any specific questions.

As previously mentioned, budget worksheets will be available to you in your Google Drive.

- 1) To access your budget worksheets, log in to your WOU email, click the “Apps” button in the top right of your screen (looks like 9 little squares) and click “Drive.”
- 2) Once Google Drive has been loaded, find “Shared with Me” on the left side of your screen and open it.
- 3) Find the folder with your division/department name and double click to open it. Inside this folder you will find your budget worksheets. Double clicking on the worksheet file will open it and you can begin editing. Any changes you make are automatically saved.
- 4) To add a column (for notes or other items), you can do so by clicking on “Insert” in the menu bar and clicking “Column right” or “Column left.”

At the end of business on March 1st, your access to the budget worksheets will be changed from “can edit” to “can view” and you will be unable to make any additional changes.

To share your worksheets with others in your staff:

- 1) Right click on either the division/department folder or the actual budget worksheet and click “Share...”
- 2) Enter the user’s WOU email address (be sure to use the @mail.wou.edu address).
- 3) Select the access type you wish to give them (“can edit” or “can view”) and click done. After March 1st, all users’ access will be changed to “can view.”

For assistance with Google Drive & Google Docs, please contact Brandon Neish directly (neishb@wou.edu).