

MEMORANDUM

TO: University Boards of Trustees Chairs
University Presidents

FROM: Mark B. Rosenberg, Chancellor

DATE: April 11, 2007

SUBJECT: 2008-2009 Legislative Budget Request (LBR) Guidelines

The Board of Governors approved the 2008-2009 budget request guidelines at its March 29 meeting, emphasizing the goals in its Strategic Plan: access to and production of degrees, meeting statewide professional and workforce needs, building world-class institutions, and meeting institutional and community needs.

The Board of Governors will be meeting later this summer to review and approve the 2008-2009 LBR for the operating budget. Instructions for the submission of the universities' fixed capital outlay plans will be distributed in May with approval of the fixed capital outlay request in September.

The Board, with assistance from your university, will be responsible for developing the following budget issues for the entire System: access, Major Gift matching, plant operations and maintenance for new and phased-in space, salary increases, medical education initiatives, and NCF Academic/Administrative Start-up Support. In accordance with the Board's direction at the March BOG meeting, we are developing a separate process to review, and consider for inclusion at the system level, requests for increased funding for State of Florida Institutes & Centers.

We are requesting that you submit to our office, no later than June 27, 2007, your institution's operating budget issues that emphasize the goals and objectives of the approved Policy Guidelines for the 2008-2009 LBR. Issues developed and approved by the University Boards of Trustees must be no more than 8% of their 2007-2008 recurring state funding (general revenue and lottery). These targets will officially be transmitted after the Legislative session. However, to provide you an early estimate so that you may begin development of your issues, attached is a spreadsheet that shows each university's recurring 2006-2007 state funding and 8% of that respective funding.

The university should submit electronically a Summary Budget form, an Operating Budget (OB)-I form and OB-II form for specific university issues to SUS-Submissions@flbog.org by June 27, 2007. An OB-I should be completed based on the primary goal that the university's issue is attempting to address. These issues must have detailed narrative explanation and justification as outlined on the OB-I forms. Issues should be placed in priority order and have approval of the Board of Trustees.

If your staff has questions regarding this submission, please have them contact Tim Jones at 850-245-9397 (SunCom 205-9397) or Annie Rosier at 850-245-9391 (SunCom 205-9391).

Attachments

cc: Ms. Carolyn Roberts, Chair, Board of Governors
Ms. Sheila McDevitt, Vice Chair, Board of Governors
Mr. Tico Perez, Chair, Board of Governors' Budget Committee
Academic Vice Presidents
Administrative & Financial Affairs Vice Presidents
University Budget Officers
University Data Administrators
Dr. Nancy McKee, Vice Chancellor for Education Policy and Research
Dr. R.E. LeMon, Vice Chancellor for Academic Programs
Mr. Tim Jones, Executive Director of Budget and Fiscal Policy
Ms. Annie Rosier, Director of University Budgets