

To: President Wim Wiewel
Vice President Cassie McVeety
General Counsel and Vice President Henry Lazenby
FADM Council

From: Vice President Lindsay A. Desrochers

cc: Roy Koch, Provost and Vice President for Academic Affairs
Carol Mack, Vice Provost for Academic Administration & Planning

Date: January 27, 2009

Re: University Budget Process 2009-10

As follow up to the earlier memo sent to the campus last week, this letter provides budget instruction and templates for the 2009-10 unit budget process for the administrative units outside OAA.

UNIT PROPOSALS

At this time we are requesting that your efforts be oriented to finding ways to maximize the University's ability to carry out its core mission of instruction and research in the most cost effective and efficient manner possible. We need you to think creatively and we need you to assist us in identifying ways to reduce costs, but continue to deliver necessary services. All units will be expected to participate and we think it is important that you consult with your employees as you evaluate the options you will submit to the UBT.

Budget Planning Process 2009-10

As part of our practice of budget and planning process in recent years, the University Budget Team (UBT) is asking the administrative/support units to review the activities of their units in relation to the larger mission of the institution and particularly their support role in relation to the University's strategic initiatives (sustainability and student success) and the following **Presidential five guiding themes**:

- Provide Civic Leadership through Partnerships
- Improve Student Success
- Achieve Global Excellence
- Enhance Educational Opportunity
- Expand Resources & Improve Effectiveness

We also ask you to review the “**Eight Budget Principles**” which can be found at the following link: <http://www.pdx.edu/budget/2010planning.html>

The University Budget Team requests proposals for (1) potential strategic investments should there be any additional discretionary resources available. This should be limited to one or two top priority items. (2) The UBT further requests proposals for potential efficiency savings and reductions. In this latter category, units need to identify reductions of 12 ½% of their recurring operating budget expenditures.

While we are very aware of the previous budget reductions and how they have affected the overall administrative infrastructure of the campus, we still need to assess all of the options as the Legislature continues to deliberate on the 2009-11 biennial budget and the magnitude of the shortfall in state revenue forecast.

Your description of strategic investments, efficiencies or reductions should be sufficiently detailed to make particular decisions transparent. Please specify the impacts of strategic investments and efficiencies and reductions in concrete impact terms. Keep your submittal of each category (strategic investments, efficiency savings / reductions) to a single page summary but any further detail needed should be attached) on the Excel template.

Upon the Budget Office’s analysis of submittal, there will be follow up discussion with members of the Budget Team.

PLEASE RETURN YOUR PROPOSALS TO YOUR VP BY MARCH 2nd. THEY WILL BE FORWARDED TO THE BUDGET OFFICE