Website & Proposal Reviews Recommendation

1. The Office of Academic Planning and Assessment has instructions on how to propose new academic degrees or programs through the Category I Proposal process on the webpage at http://oregonstate.edu/ap/curriculum/cati.html. At the bottom of this webpage the review process is listed as follows:

   Review Process:
   A. Draft Review Meeting
   B. Library Evaluation
   C. Budget and Fiscal Planning Review
   D. Graduate Council Review
   E. Curriculum Council Review
   F. Faculty Senate Approval via FS Executive Committee
   G. OUS Provost Council
   H. External Review (if grad)
   I. State Board of Higher Ed
   J. Campus Announcement

The underlined items above represent hyperlinks to the committee’s faculty senate webpage. The webpage for Budgets and Fiscal Planning Review shows the following:

   Budgets & Fiscal Planning Committee
   • Standing Rules
   • Membership
   • Agendas
   • Minutes
   • Annual Reports
   • Scheduled Meetings
   • OSU FY04 Preliminary Budget

The webpage does not include any information on the Budgets & Fiscal Planning Committee’s Review Process. To remedy this we recommend adding the following hyperlink to the webpage.

   • Budgets & Fiscal Planning Review Guidelines

This hyperlink would link to a webpage that could include information such as the following:

   Budgets & Fiscal Planning Review Guidelines

1. Proposals must be complete and include Budget Outline Forms for all four years.

2. For Full Category I Proposals, all costs included in Section 7 titled “Financial Sustainability” must be included in the Budget Outline Forms.

3. For Abbreviated Category I Proposals, all costs included in section D titled “Resources Needed” and section E titled “Funding Sources” must be included in the Budget Outline Forms.

   -continued on next page-
4. Budget Outline Forms submitted as part of Full or Abbreviated Category I Proposals are expected to be professionally prepared and technically correct. Proposers are encouraged to avail themselves of the services of financial professionals within their department, college, business center or the University Office of Budget and Fiscal Planning to prepare a complete budget.

5. Upon submittal to the Budgets & Fiscal Planning Committee for review, the committee will put the proposal on the agenda for review and set a timeline for review of the proposal.

6. Committee members will review proposals using the Budgets & Fiscal Planning Proposal Review Form\(^1\). To view the form for specific guidelines click here\(^2\).

7. After committee review, if additional information or clarification is needed, a member of the committee will send a response to the proposer requesting the additional information or clarification. If additional information or clarification is not required, then the committee will make a recommendation to approve or deny the proposal and forward to Academic Affairs.

8. Once Academic Affairs receives the committee's recommendation, the proposal will be forwarded to the next committee in line for their review. For additional information on the Category I Proposal process please visit the Academic Affairs website at http://oregonstate.edu/admin/aa/curriculum/program.html.

\(^1\)This would be a hyperlink to the “Budgets & Fiscal Planning Proposal Review Form” which is following this page.

By implementing these recommendations, the committee would be providing direction for submitting professionally developed Budget Outline Forms and the criteria that our committee considers when reviewing the proposals.
BUDGETS & FISCAL PLANNING COMMITTEE
PROPOSAL REVIEW FORM

Proposal Title: ____________________________________________________________

Reviewer: ________________________________________________________________ Date: __________________________

☐ Proposal and Budget Outline Form do not reconcile
   ☐ Personnel: ____________________________________________________________

   ☐ Other Resources: ____________________________________________________

   ☐ Physical Facilities: __________________________________________________

☐ Proposal does not demonstrate sustainability
   ☐ Does not include adequate Business Plan
      ☐ Long term financial viability: ________________________________

      ☐ Anticipated Sources of Funding: ________________________________

      ☐ Ability to recruit and retain faculty: ____________________________

      ☐ Long Term Library Support: ________________________________

   ☐ Does not include plans for development and maintenance of unique resources
      ☐ Buildings: ______________________________________________________

      ☐ Labs: ______________________________________________________

      ☐ Technology: __________________________________________________

      ☐ Does not address targeted student/faculty ratio: _______________________

      ☐ Does not illustrate resources to be devoted to student recruitment: ______

☐ Funding or revenue sources are unclear: ________________________________

☐ Opportunity costs: _____________________________________________________

☐ Other: ______________________________________________________________

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