February 1, 2012

TO: MSU Campus

FR: Terry Leist, Interim Vice President for Administration & Finance

RE: Update on the Investment Proposal Process

Last fall, the MSU Budget Council issued a call for investment proposals from the campus community. This process was created to provide potential campus investment projects for President Cruzado to strategically support, if funds are available. Thank you to everyone who took time to submit a proposal. Seventy-four (74) proposals were received and the Budget Council will be reviewing each proposal prior to February 10. Approximately $1.2 million has been identified for potential funding of the proposals. The total funding requested (74 proposals) is $10.6 million, consisting of $2.4 million one-time-only funds, $3 million multi-year (up to 3 years) funds, and $5.2 million base (recurring) funds. A list of all proposals is posted on the Budget Council website, http://www.montana.edu/budgetcouncil/ If you submitted a proposal, please verify we have it listed.

For the initial review, each proposal will have a primary reviewer, secondary reviewer, and reader (total of three members randomly selected from Budget Council for each proposal). Each reviewer will independently evaluate the proposals and provide a score based on a 1 to 10 scale using some general scoring criteria. Strategic alignment with MSU’s core themes will be strongly considered, in addition to the overall quality of the proposal. The Montana University System target of 70 percent general fund spending in the areas of instruction, academic support, and student services will also have priority.

On or before February 10, the Budget Council will meet to discuss all proposals as a group. The primary and secondary reviewers, as well as the reader, will share their evaluation of the proposals and scores will be recorded and averaged. These scores will be the primary factor for further consideration of the proposal. At this time, we are aiming to identify about 25 proposals to be considered during the next step of the review process, which will be public hearings. The requestor(s) of these proposals will be contacted no later than February 10 to attend one of the public hearings scheduled February 15-17 in room SUB 235. The public hearings will provide the Budget Council time to ask questions about the proposal (to the requestor(s)), as well as allow any public comment. The requestors of proposals which do not advance to a public hearing will be notified by February 15. These proposals will not be considered further by Budget Council. However, all proposals will be available for consideration by President Cruzado.

Following the public hearings, the Budget Council will discuss and rank the (hearing) proposals and provide recommendations to President Cruzado by approximately February 29. Proposals will be prioritized in multiple strategic categories, rather than a single ranked list. This will provide President Cruzado with guidance about investment recommendations for different campus needs.

As you know, this entire process is new and we are learning a great deal during this first year. It is my hope that we will automate the process next year and make other valuable changes. I encourage you to share your recommendations and comments with me, our Budget Council members or our Budget Office staff. As more information becomes available, I will send another communication to you.

If you have any questions, please contact Kathy Attebury, Budget Director, at attebury@montana.edu or 994-4391.