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To: Daniel Layzell, Louisiana State University System  
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Joseph Marin, Louisiana Community and Technical College System  
Craig McClain, Louisiana University Marine Consortium  
Sujuan Boutte, Louisiana Office of Student Financial Assistance

From: Terrence Ginn, Deputy Commissioner for Finance and Administration

Date: July 5, 2017

Re: FY 2017-2018 Operating Budget Request

This memorandum shall serve as the official request from your respective institutions for the completion of the FY 2017-2018 operating budget and athletic budget forms. All forms and instructions needed to complete these requests have been included in this email package. Additionally, these forms and instructions will also be available on the Board of Regents website [www.regents.la.gov](http://www.regents.la.gov) under the Finance/Facilities section under the heading "Forms and Reports"/"Operating Budget Data", and I direct your attention to them and urge your review before proceeding to complete. There are 2 changes to forms. In the workbook for BOR-1, BOR-2, BOR-3 etc., a sheet has been added to collect the Mandated Costs for each school. This will help us summarize for all of higher education. In addition in the BOR-5 workbook a BOR-5A has been added to collect information on the usage of the 5% needs based assistance fund. Institutions will report any scholarships, hardship waivers, other programs, etc. using these funds.

**Formula and Specialized Institutions:** one completed bound set of these operating budget forms for each of your institutions to this office no later than **September 4, 2017**. The column for FY 17-18 budgeted, and FY 16-17 budgeted should be completed and the column labeled FY 16-17 actual should be left blank. In addition to the **one** completed bound set, the completed BOR FORMS Excel workbook and Excel BOR-5 should be completed and e-mailed to [lori.parker@la.gov](mailto:lori.parker@la.gov). Once these FY 2017-18 operating budgets are reviewed by the Board of Regents, the formula institution budgets along with an overall formula funding request will be submitted to the Division of Administration as part of the FY 2018-2019 budget request for formula institutions. (Please note any institution/agency submitting all 3 columns in just one submission must also follow the directions below regarding number of copies and cd's due October 2, 2017. One bound copy may be sent September 4<sup>th</sup> with the other seven bound copies and cd's due by October 2, 2017.)

**Agency units and Management Boards:** LOSFA, LUMCON, LSU Pennington Biomedical Research Center, and each of the management boards should submit one bound copy of forms BOR-1, BOR-2, BOR-3 and BOR-3A to this office no later than **September 4, 2017**. The column for FY 17-18 budgeted, and FY 16-17 budgeted should be completed and the column labeled FY 16-17 actual should be left blank. In addition to the one completed bound set, the BOR FORMS Excel workbook must be completed and e-mailed to [lori.parker@la.gov](mailto:lori.parker@la.gov). (Please note any institution/agency submitting all 3 columns in just one submission must also follow the directions below regarding number of copies and cd's due October 2, 2017. One bound copy may be sent September 4<sup>th</sup> with the other seven bound copies and cd's due by October 2, 2017.)

Act 49 of the first extraordinary session of 1998 requires that the operating budgets shall contain, at a minimum, budgetary information on prior year actual revenues and expenditures. In order to comply with Act 49 it is requested that **formula and specialized institutions** submit to this office no later than **October 2, 2017**, **eight** completed bound copies of the BOR-1 through BOR-15 forms and the BOR-ATH-1 through BOR-ATH-3 forms with the FY 17-18 budgeted, FY 16-17 budgeted, and the FY 16-17 actual columns completed. At this time, we are also requesting that the **agency and management board units** provide us with **eight** completed bound copies of the BOR-1, BOR-2, BOR-3 and BOR-3A completed as above no later than **October 2, 2017**.

The **agency and management board units** will continue to request funds using the Division of Administration's budget forms. Eight copies of these budget requests are due in this office no later than **October 11, 2017**.

**All units:** Eight cd's with all of the forms used to create the bound submissions must be included in the October submission. They are required now in addition to the bound copies. Please use Excel files and not .pdf files where possible. These cd's can be done by institution or system.

All budget requests for FY 2017-2018 will be submitted to the Office of Planning and Budget by October 15<sup>th</sup>. **Therefore, it is imperative the above deadlines be met to ensure timely delivery of the documents.** A follow-up memo will be sent to your offices regarding the FY 2017-2018 budget hearings to be held in September, currently scheduled for September 26<sup>th</sup>.

If you have questions concerning these matters, Lori Parker, Assistant Commissioner for Budget Analysis at 225-342-4253.