



## MEMORANDUM

**TO:** Fiscal Officers and Controlling Board Designees for State Agencies, Boards and Commissions

**FROM:** J. Pari Sabety, Director

**RE:** Quality Guidelines for CB Agenda Items

**DATE:** January 22, 2007

In an effort to maximize the Controlling Board's efficient use of state resources the issues listed below will need to be addressed by agencies in order to ensure placement of their requests on the Controlling Board agenda.

- Requests submitted after the 9:00 AM deadline will not be considered for the upcoming Controlling Board.
- Requests that are submitted on time but have substantial issues including but not limited to poor quality, omissions, incomplete information, vagueness, missing attachments, unsigned permit & release will be routed back to the agency and will not be considered for that Controlling Board.
- Requests should be able to stand on their own merit and should be thorough and detailed enough for someone not familiar with the program to understand.
- Controlling Board requests need to be thorough when submitted and the agencies need to clearly explain and thoroughly detail why they are making the request, what the request is for and how they came to that dollar amount for the request.
- Questions asked by OBM analysts must be addressed acceptably before the item is accepted for the Controlling Board agenda.
- There will be increased scrutiny of waivers of competitive selection, Buy Ohio outreach, Minority Business Enterprises, and Women Owned Minority Business Enterprises. Agencies can expect to be questioned if they routinely use Controlling Board to disregard biennial budget limits or request increases in appropriation authority. Exceptional and unusual contract terms, such as up front lump sum payments for future services to be rendered, will also be reviewed with special attention.
- For future planning purposes, OBM will request that agencies provide a general calendar for their routine Controlling Board requests for the next six months on February 6, 2007. It is expected that this planning calendar will help budget analysts at LSC and OBM be better prepared to review requests in a timely manner. The calendar will be made available on the E-Controlling Board website.

Items not meeting these criteria will not be brought to the Controlling Board for a vote.

For the January 22<sup>nd</sup> Controlling Board we implemented many of the changes mentioned in this memo and redirected almost half of the requests back, totaling approximately \$147 million, to the agencies for further review.

### January 22, 2007 CB Requests

	Number	Amount
<b>Received</b>	101	\$210,634,589.15
<b>Deferred</b>	47	\$146,906,626.75
<b>Scheduled</b>	54	\$63,727,962.42