

Chapter 4

The Recommendation Summary View

4.1 WHAT IS THE RECOMMENDATION SUMMARY?

Recommendation Summary summarizes the incremental expenditure portion of budget request — your budget at a glance.

This is the step table format that summarizes the incremental expenditure change information. It begins with legislative spending authority in the current biennium and lists the incremental changes in the carry-forward, maintenance and performance levels to arrive at the agency’s 2017–19 request. Each budget line on the RecSum represents a single budget policy decision in the form of a decision package.

Conceptual Description of the RecSum

Budget Level	Appropriate Items
Current biennium	Legislatively authorized appropriation level and nonappropriated expenditure level
Carry-forward changes	<ul style="list-style-type: none"> • Biennialization of legislatively directed workload and program changes • Shifting of any continuing unanticipated federal and private/local expenditures to anticipated appropriation type • Negative adjustments for nonrecurring costs
Maintenance changes - level 1	<ul style="list-style-type: none"> • Mandatory caseload, workload and enrollment changes only. Typically tied to official forecasts.
Maintenance changes - level 2	<ul style="list-style-type: none"> • Rate changes, such as lease, fuel and postage • Central service agency charges and other rate adjustments • Specific compensation adjustments: OASI, merit increments (only for agencies with fewer than 100 FTEs) and retirement buyout costs • Inflation • Changes to nonappropriated accounts beyond current allotted levels • Other mandatory cost increases outside agency control • Replacement of existing, but worn-out equipment • Operating costs of just-completed capital projects • Transfers between programs or agencies, or between years for dedicated accounts • Unanticipated receipts not included in carry-forward level • Federal, private/local and dedicated fund adjustments <p><i>Note: See Section 5.2 for further details on maintenance level.</i></p>
Performance changes	<p>Prioritized:</p> <ul style="list-style-type: none"> • Discretionary workload in current programs • New programs or services • Reductions or eliminations of programs or services • Reallocation of existing resources • Significant changes in fund sources
Total Budget Request	Sum of above items

4.2 RECOMMENDATION SUMMARY SUBMITTAL REQUIREMENTS

The RecSum report has a required format

The RecSum displays the requested dollars by fund and the number of average annual FTEs for the biennium for each change between the current biennium and the ensuing biennium budget request. Each change item in the carry-forward, maintenance and performance levels is listed as a separate line item with its own RecSum/decision package code and descriptive title.

BDS will generate the RecSum

The agency is able to generate the RecSum directly from BDS once it has entered all required decision package information.

Most agencies submit the RecSum at the agency level

Agencies must submit a RecSum at the agency level unless they are required to submit budgets at a lower level. Agencies listed in Chapter 1.2 must submit a RecSum at the program (or category) level.

Use approved codes to designate change items

With few exceptions (see following note), agencies are free to use any combination of two-digit RecSum codes (e.g., Alpha/Alpha, Alpha/Numeric, Numeric/Numeric and Numeric/Alpha). RecSum codes are called decision package codes in BDS, and the terms are used interchangeably in this document.



Note: OFM designates codes that must be used for certain types of maintenance and performance level changes (see Chapter 5.2). RecSum codes containing the letter O or the letter I are not allowed to prevent confusion with zero and one.