Today’s Agenda

- The BAC members
- The budget planning schedule
- Funding sources
- The great unknown
- Budget forms
- Budget presentations
TAMIU Budget Advisory Committee

The BAC
The Budget Advisory Committee (BAC)

The Budget Committee is a collaborative body that works for the greater good of the University, and members are prohibited from advocating or campaigning for their department or college. The Budget Committee does not approve or reject any budget requests, but works instead in an advisory capacity.
BAC Members

• Faculty college representatives
  – Natalie Burkhalter (Nursing)
  – Aleta Belcher (Education)
  – Tagi Sagafi-Nejad (Business)
  – Claudia San Miguel (Arts & Sciences)

• Faculty senate representative
  – John Maxstdat
BAC Members

• Professional and support staff representatives
  – Mario Moreno (Title V)
  – Sandra Pena (HR)

• Administrator representatives
  – Cathy Guerra (instructional)
  – Juan Lira (non-instructional)

• Staff senate representative
  – Jerry Alva
Budget Planning Schedule

- Early December – Budget request forms distributed
- January 29 – Prioritized college requests due to Provost, other requests due to VPs
  - Due dates to deans set by each college
- February 19 – Prioritized requests by VP due to CFO
- March – BAC hearings held
- March/April – BAC deliberations
Budget Planning Schedule

- May 3 – Merit worksheets distributed
- May 14 – Merit worksheets due to VPs
  - Due date to deans set by each college
- May 26 – Merit worksheets due to Budget Office
  - Submitted by VPs
- July 22-23 – BOR meeting to approve University budgets
Funding Sources
Funding Sources

State appropriations
- Second year of the biennium
- No new funds from State

Board authorized (designated) tuition
- Capped at 3.95% by Chancellor
- May be adjusted by Board

HEAF
- Construction
- Capital equipment
## Educational and General

### State appropriations, state tuition, and HEAF

<table>
<thead>
<tr>
<th></th>
<th>3% Merit</th>
<th>2.5% Merit</th>
<th>0% Merit</th>
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<tbody>
<tr>
<td><strong>Total Revenues</strong></td>
<td>$52,154,702</td>
<td>$52,154,702</td>
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<tr>
<td><strong>Current expenses</strong></td>
<td>$51,354,702</td>
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<td><strong>Sub-total new revenue</strong></td>
<td>$800,000</td>
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<td><strong>Merit</strong></td>
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<td><strong>Net new revenues</strong></td>
<td>$0</td>
<td>$192,000</td>
<td>$800,000</td>
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## Board Authorized Tuition

**Proposed $3.33/SCH increase**

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<td><strong>Total Revenues</strong></td>
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<td><strong>Current expenses</strong></td>
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<td><strong>Sub-total new revenue</strong></td>
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<td><strong>Merit</strong></td>
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<td><strong>Net new revenues</strong></td>
<td><strong>$856,444</strong></td>
<td><strong>$874,444</strong></td>
<td><strong>$966,444</strong></td>
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## Availability of New Funds

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<td><strong>E&amp;G</strong></td>
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<td><strong>Designated</strong></td>
<td>$856,444</td>
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<tr>
<td><strong>Net new funds</strong></td>
<td>$856,444</td>
<td>$1,066,444</td>
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Our journey into...

The Great Unknown
The Great Unknown

• The Board
• The economy
• The legislature
### The Great Unknown

10% reduction in our E&G appropriations

- Roughly $4.5M

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- All scenarios would result in a deficit
The Great Unknown

A reduction in appropriations would almost certainly require:

- A hiring freeze
- A reduction in summer school budgets
- A reduction in merit
- A reduction in incentive funds
- A reduction in M&O
The Great Unknown

- Holiday shopping season
- Sales tax revenues
- Comptroller report in February
- LBB request late spring or summer
TAMIU

Budget Forms
Budget Request Forms

- Due to VP by January 29
- All requests are listed and prioritized

### 2009-2010

**Budget Request Form**

| Department: | 
| --- | --- |

| Budget Head: | 
| --- | --- |

### Strategic Plan Goals (SPG)

1. Academics  
2. Research  
3. Service  
4. Financial Resources  
5. Human Resources  
6. Physical Resources  
7. Internationalization

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**PLEASE ENTER THE NAME OF THE DEPARTMENT THAT THE BUDGET REQUESTS CORRESPOND TO.**

**ONLY 1 BUDGET CODE PER LINE.** The budget priorities should be numbered sequentially—DO NOT repeat numbers. If several line items are inseparable (meaning one can not function or operate without the purchase of the other), you may give them each the same priority, however, your next line item will have a budget priority equal to the last priority plus the number of line items for the last priority (i.e. if three inseparable items are ranked priority 1, your next item will be ranked priority 4).

**LIST ONLY 1 BUDGET CODE PER LINE. THIS FORM IS LOCKED. DO NOT CUT AND PASTE. USE COPY, PASTE AND DELETE.**

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<th>O/R</th>
<th>SPG</th>
<th>Class</th>
<th>Account Number</th>
<th>Amount Requested</th>
<th>Brief Description</th>
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Budget Request Narrative

- Due to VP by January 29
- Narrative gives more details about each request
- One per request on Budget Request Form
Some Notes About Forms

• Both forms are locked

• Automated prompts assist with completion

• Complete using the default font

• List ALL requests including HEAF

• Requests that tie back to the University Strategic Plan will have a better chance of being funded

• Be reasonable given uncertainties
Some Notes About Presentations

• The presentations are intended to give the BAC a better understanding of requests

• Very low-tech – NO PowerPoint or other technology permitted

• Limited time generally 10 – 30 minutes depending on area

• Experts must speak within your allotted time

• Informal and stress-free
Questions?