Budget Process Overview

November 22, 2020
Unrestricted

- Tuition & Fees
- State Appropriation
- General Obligation Debt Service

Restricted

- Federal Student Grants & Loans
- **Auxiliaries**/Enterprises
- Sponsored Research/Overhead
- Service Centers, Revenue Generating Units, External
- RI Capital Fund (RICAP)

State Crime Lab – separate State Appropriation

Per RIGL 16-59-9, auxiliary units must be self-supporting; thus, they are charged an Auxiliary Indirect Cost ~6% for services provided by the unrestricted budget.
Fund 100,103,104,106: Unrestricted Revenue (i.e. Tuition and Fees, State Appropriation)

Fund 100,103,104,106: Unrestricted Expense - Allocations to departments (i.e. Textiles, Economics, Electrical Engineering). Source: Unrestricted Revenue

Fund 103 is Legislative “Grants”

Fund 104 is Jason and Coastal Resiliency

Fund 106 is URIOnline

Fund 100, 103, 104, 106 included in unrestricted budget
Fund 101,105—Revenue and Expense. Self-supporting accounts such as Summer Orientation, Theatre Productions, & Printing Services (105=Service Center)

Fund 110—Indirect Cost (Overhead):
Revenue and Expense; Overhead recovery allocated to the Colleges/Departments

Fund 125 – Shepards – facilities support funded from Fund 100 and from State through OHE

Funds 100, 101, 103, 104, 105 included in unrestricted budget
Fund Definitions

Fund 102
- State Crime Lab - Separate State Appropriation

Fund 125
- Shepard’s Facilities (50% Support)
- Remaining 50% from State
Fund 101,105— Revenue and Expense. Self-supporting accounts such as Summer Orientation, Theatre Productions, & Printing Services; service centers are Fund 105

Fund 110—Indirect Cost (Overhead):
Revenue and Expense; Overhead recovery allocated to Sponsored Projects Administration, Colleges/Depts/Prov&VPRED for Startups/Matches/President
Fund 210-331 Auxiliary & Expense

**Auxiliary Units:** Health Services, Memorial Union, Bookstore, Residential Life and Dining Services

**Enterprise Units:** W. Alton Jones, Parking Services, Ryan Center/Boss Ice Arena

Fund 500—**Sponsored Research:** Federal and State Grants awarded to the University. This may include special federal allocations such as Stimulus Funding
FUND DEFINITIONS

Fund 400—Private Funds: Private funds with a restricted intent indicated by an outside entity. These are included in the University’s budget (i.e., NCAA $ for Academic Advisor for Athletics)

Plant Funds: General fixed asset accounts, general long-term debt accounts, and bond funds.

Fund 401: URI Foundation; separate 501c3; not included in University budget
Fund 900—Agency Funds: Funds held by URI as custodian for sponsor or University related organization. Money is deposited with the URI for safekeeping to be used or withdrawn by the depositor at will.

Budget Transfers: Only permitted within each fund.
**Unrestricted** – One State Appropriation for URI Fund 100, 103, 104, 106

- within Fund 100 is $500K designated for the research vessel (Endeavor)

  – Separate State Appropriation for RI State Crime Lab (Fund 102)

**Restricted**

  – RI State Crime Lab

  – An example would be RICAP Funds
BUDGET CATEGORIES

- Unrestricted
  Fund 100, 103, 104, 106
- State Crime Lab
- Auxiliary
  Housing & Residential Life, Bookstore, Dining Services, Memorial Union, Health Services
- Enterprise
  W. Alton Jones, Parking Services, Ryan Center & Boss Arena
- Sponsored Projects
  Federal, State, Municipalities
- Overhead related to Research
- External Student Aid (e.g. Pell Grants; Ford Direct Parent & Student Loans)
- Other (Fund 101 (revenue generating e.g. Child Dev Ctrs), Fund 105 (service centers), Fund 400)
- RICAP Capital Funds (RICAP)
## Internal Budget Timeline

<table>
<thead>
<tr>
<th>Month/Year</th>
<th>Event Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>July/August 2020</td>
<td>Budget Request &amp; approval (President) in process (e.g. FY22)</td>
</tr>
<tr>
<td>Sept</td>
<td>Budget Request submitted to Board</td>
</tr>
<tr>
<td>October 1</td>
<td>FY22 Budget Request due to state (RIGL 35-3-4)</td>
</tr>
<tr>
<td>Oct/Nov/Dec</td>
<td>Review &amp; approval of current year budget (mid-year) FY21</td>
</tr>
<tr>
<td>January 21</td>
<td>Revised mid year budget uploaded to financial system (FY21)</td>
</tr>
<tr>
<td>Mid January</td>
<td>Governor’s recommended budget for FY22</td>
</tr>
<tr>
<td>Spring</td>
<td>FY2022 Allocation &amp; approval in process</td>
</tr>
<tr>
<td>Spring</td>
<td>Acad Aff College Budget Hearings</td>
</tr>
<tr>
<td>Spring</td>
<td>Colleges/areas access budget system (PBCS) to complete</td>
</tr>
<tr>
<td>May</td>
<td>FY22 Allocation</td>
</tr>
<tr>
<td>July 2021</td>
<td>FY22 Allocation uploaded to financial system</td>
</tr>
<tr>
<td>Date</td>
<td>Event Description</td>
</tr>
<tr>
<td>--------------</td>
<td>-----------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Sept 2019</td>
<td>FY2021 Budget Request submitted to Council and state</td>
</tr>
<tr>
<td>Jan 2020</td>
<td>FY2021 Governor’s recommended budget for state appropriation and RICAP funding</td>
</tr>
<tr>
<td>May 2020</td>
<td>Updates to all revenue, including Governor’s recommended budget and expense for FY2021 budget</td>
</tr>
<tr>
<td>July 2020</td>
<td>FY2021 Allocation on URI financial system</td>
</tr>
<tr>
<td>Aug 11, 2020</td>
<td>State released budget guidelines (late due to Covid)</td>
</tr>
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<td>July-Sept 2020</td>
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<td>October 1, 2020</td>
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</tr>
<tr>
<td>In a “normal” year, the Budget Request would be submitted to the Board the first week of September</td>
<td></td>
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Strategic Budget and Planning Council created by President David M. Dooley in 2010

Requests for new funding are submitted to the Council each year by Division Heads

Council charge, membership, agendas, minutes, budget principles, process for new funding requests, and other information can be found at: https://web.uri.edu/sbpc/
Allocation Budget Process By Fund

Fund 100
- Areas receive a budget for upcoming fiscal year; they usually reallocate within the approved bottom line; they are not responsible for budgeting fringe benefits (see later slides for budget process in Academic Affairs that precedes the approved bottom line allocation)

Fund 100 w/fringe
- Areas receive a budget for upcoming fiscal year; they usually reallocate within the approved bottom line; they are responsible for budgeting fringe benefits

Fund 100
- Within Fund 100 is a required $500K match for Endeavor; this remains at $500K each year
### Allocation Budget Process By Fund

<table>
<thead>
<tr>
<th>Fund 102</th>
<th>Funded from separate State Appropriation</th>
</tr>
</thead>
<tbody>
<tr>
<td>Fund 103</td>
<td>Areas receive a budget as specified in enacted budget: Legislative Grants (Special Olympics and Small Business Development Center) and Coastal Resiliency and Jason are specifically designated from State Appropriation for upcoming fiscal year; they usually reallocate within the approved bottom line; they are not responsible for budgeting fringe benefits</td>
</tr>
<tr>
<td>Fund 104</td>
<td></td>
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### Allocation Budget Process By Fund

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<tr>
<td>Fund 101, 105</td>
<td>Cost centers and service centers; determine revenue by rates and estimated services. Revenue and expense budget must be equal. They are responsible for budgeting fringe benefit areas.</td>
</tr>
<tr>
<td>Fund 106</td>
<td>Areas receive a URI Online budget as previously determined by Provost Office, Faculty Affairs, and Online Teaching and Learning</td>
</tr>
<tr>
<td>Fund 110</td>
<td>Areas receive a budget as previously determined by BFPO review of estimates from all colleges and from the Research Office and the Office of Controller. Distribution is in accordance with approved distribution of overhead</td>
</tr>
<tr>
<td>Fund 110 SPA</td>
<td>These are overhead departments that are funded from a portion of the overhead. Expenses are projected for the fiscal year and the allocation budget is provided for those estimated expenses as long as it is within the approved distribution of overhead designated for SPA.</td>
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<td>These units must be self-supporting by RI law. They determine revenue by approved rates and estimated services/clients. The revenue and expense budget must be equal.</td>
</tr>
<tr>
<td>Enterprise</td>
<td>This unit is funded ~50% from URI Fund 100 budget and ~50% from state funds in OPC budget. Expenses are projected for the fiscal year and the allocation budget is provided for those estimated expenses as long as it is within the approved budgeted amounts in URI and OPC budgets.</td>
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<td><strong>RICAP</strong></td>
<td>This consists of Asset Protection and specific capital projects and is funded from RI Capital Funds. The allocation reflects the RICAP allocation in the enacted state budget.</td>
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<tr>
<td><strong>Fund 400</strong></td>
<td>This reflects restricted funds as designated by an external unit (e.g. NCAA $ for academic advisor for athletes). They are responsible for budgeting fringe benefits.</td>
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<tr>
<td>Fund 100</td>
<td>BFPO seeks various info from areas on campus. Revenue and expense projections are Areas receive a budget for upcoming fiscal year; they usually reallocate within the approved bottom line; they are not responsible for budgeting fringe benefits (see later slides for budget process in Academic Affairs that precedes the approved bottom line allocation)</td>
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<td>Fund 100 w/fringe</td>
<td>Areas receive a budget for upcoming fiscal year; they usually reallocate within the approved bottom line; they are responsible for budgeting fringe benefits. Funded from separate State Appropriation</td>
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**Mid-Year Budget Process by Fund**
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<th>Fund 100</th>
<th>Areas receive a budget for upcoming fiscal year; they usually reallocate within the approved bottom line; they are not responsible for budgeting fringe benefits (see later slides for budget process in Academic Affairs that precedes the approved bottom line allocation)</th>
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Fund 103
Areas receive a budget as specified in enacted budget (since “Legislative Grants” and “Endeavor” are funded from State Appropriation) for upcoming fiscal year; they usually reallocate within the approved bottom line; they are not responsible for budgeting fringe benefits

Fund 104

Fund 101, Fund 105
These are cost centers and service centers and determine revenue by rates and estimated services. The revenue and expense budget must be equal. They are responsible for budgeting fringe benefits
Fund 110 Areas receive a budget as previously determined by BFPO review of estimates from all colleges and from the Research Office and the Office of Controller. Distribution is in accordance with approved distribution of overhead.

Fund 110 SPA These are overhead departments that are funded from a portion of the overhead. Expenses are projected for the fiscal year and the allocation budget is provided for those estimated expenses as long as it is within the approved distribution of overhead designated for SPA.
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• March – All day meeting with Deans
  Deans highlight
  ➢ Unit’s mission
  ➢ Relationship between unit’s plan and overall University priorities
  ➢ Summary of unit investment strategies and areas of reduction if necessary

• Ensure transparency across unit. Provide informational basis to encourage cross unit collaboration in education, research, outreach and administrative functions.

• Faculty Senate Leadership Participates
• STRATEGICALLY PLAN AND MANAGE ACADEMIC AFFAIRS
• April – Individual meetings with Deans
  ➢ Narrative with strategic priorities for the new year
  Review and discussion including:
  ➢ Student data       TT Faculty
  ➢ Lecturers          Per Course Lecturers
  ➢ Budgets and Actuals Lowest funded item(s)
  ➢ Balances in non-fund 100 accounts
  ➢ Academic Plan
INDIVIDUAL COLLEGE BUDGET HEARINGS

- Maximization of teaching/learning & co-curricular activities and research/scholarship activities
- Significant and very high level of focus on highest strategic priorities in colleges/units
- Continue efforts to relate vision, strategic planning and budget processes in Academic affairs to the University’s strategic priorities and budget
- Follow basic budget process and budget principles used for four years
The principles displayed in the next seven slides apply to the management, allocation, and investment of general revenue funds including funds derived from State Appropriation and tuition and fees. These principles apply to budget increments and decrements. While there may be occasional justifiable exceptions relative to the management, allocation, and investment of non-general fund revenues, these principles should also apply to all university and unit budgeting and fund allocations.
1. For a budgeting process to be strategic, institutional strategic priorities must influence resource allocation and resource allocations must represent investments in priorities and essential programs. As such, the budget becomes a visible manifestation of academic priorities and strategic plan.
2. For budgets to be sustainable revenue potential and costs over time must coincide and mechanisms are needed to insure budget stability, despite annual increases in costs associated with salaries and benefits of personnel. Centralized budget recovery mechanisms need to be established to adjust budgets and create potential for reallocation. Capturing funds associated with vacated positions is one such mechanism and is preferable to annual budget recovery (usually 1, 3, or 5% recovery) approaches.
3. Funds and lines associated with vacated positions (retirements and departures) will be recaptured centrally and strategically allocated, in most cases, at entry level salary. Lines vacated because of denied tenure decisions will remain in the college/unit, but should be used to fill priority needs in concert with the strategic plan of the college.

4. Investments in new initiatives within units should include non-central resources from the units or internal reallocations. Central co-investment reflects mutual support of programs.
5. Resource allocations, including new and replacement positions and both increments and decrements, will be guided by unit performance, which will consider unit productivity, cost-effectiveness, and innovation as well as strategic priority and the specific role of the position. Across-the-board budget alterations will usually be avoided. Indicator metrics for these variables will be defined and unit targets may need to be established because different units may have different productivity measures.
6. The budget process needs to be relatively simple (i.e., based on a few understandable metrics), consistent, and transparent and should ensure an open mechanism of communication between the responsible unit (e.g., colleges), budget managers, and departments and faculty within units.
7. An effective budget process encourages innovation and efficiency, and aligns incentives for behavior in support of strategic priorities, productivity, and cost effectiveness.

8. A formalized budget process, including annual submission of a budget document and a budget hearing, will ensure that budget needs and requests from all units reflect unit priorities broadly, are considered at the same time, and reflect a multi-year budget planning horizon within units.
9. Once allocations are made, units are expected to operate within the framework and constraints of their annual budget, unless emergency situations (e.g., mid year state appropriations reductions, sudden dramatic enrollment shifts, etc.) occur during the year.

10. If possible within financial constraints, the Provost should maintain a contingency fund to be used for budget protection and/or for short-term strategic investment.
Theme 1: Enhancing Student Success

Goal 1 Transform undergraduate and graduate student learning and academic support with a firm commitment to student success and the development of knowledgeable, skilled, and engaged citizens prepared for an ever-changing world

• Pedagogy to Engage Students
• Expand Experiential learning
• Expand modes of course delivery and assessment by leveraging space & time in new ways
• Faculty development and incentives to promote new learning approaches
• Advancing liberal education
• Access & Affordability, credit completion for all populations
Theme 2: Expand Research, Scholarship, and Creative Work

Goal 2  Achieve high-impact, translational, and innovative research, scholarship, and creative work that addresses state, regional, and world challenges to improve health, environmental sustainability, economic development, and the human experience

- Broaden resources and support growth in research opportunities and demonstrate value and recognition for multiple forms of scholarship
- Foster inquiry-based interdisciplinary knowledge and the Scholarship of Teaching and Learning (SoTL), and build greater connections across disciplines and academic units
- Target research initiatives that impact economic & workforce development
- Involve undergrad and grad students in rich & varied research, creative projects & other opportunities
- Develop high-performance research computing initiatives to facilitate research & advance big data analyses & applications across all disciplines
Theme 3: Grow a Global Presence

Goal 3: Advance the internationalization of the University, develop students as engaged global citizens, and create meaningful international strategic partnerships.

• Articulate & prioritize internationalization of institution-wide strategic plans & faculty hires
• Provide appropriate administrative leadership and structure to promote & coordinate the globalization efforts of the University
• Create opportunities for the internationalization of the curriculum and co-curriculum to ensure that all students are exposed to global perspectives and build global competence
• Create institutional policies and support mechanisms to provide faculty with opportunities to develop global competence to maximize the impact of student global experiences on learning outcomes
• Expand support structures and efforts to increase numbers of domestic students engaging in international education experiences, and successfully recruit, enroll, and retain international students
• Formalize the process of strategic planning and proposal review, approval, tracking, and assessment of international partnerships
Theme 4: Embrace Diversity and Social Justice

Goal 4 Inspire an enlightened community that is characterized by vibrant cultural diversity; that embraces difference; that is built upon a learning environment that fosters respect, understanding, and social justice; and that rejects prejudice and intolerance.

- Develop robust plans for diversifying faculty & staff by employing new & novel approaches that realize & retain greater numbers of diverse faculty
- Increase the recruitment, retention, and graduation of students from underrepresented groups, and provide support for their inclusion & success in the academic environment
- Create an active learning community among students, faculty, staff, and administrators that engages in open discourse and enhanced understanding about what it means to be a diverse and socially just community
Theme 5: Streamline Processes to Improve Effectiveness

Goal 5 Engender a highly professional work culture that celebrates service and is characterized by flexible, effective, and efficient processes and by trust, support, and recognition towards greater institutional effectiveness.

- Develop new strategic & supportive human resource, affirmative action & payroll administrative processes within all divisions of the University that enable efficiency & effectiveness in hiring & retaining excellent employees & in performance mgmnt
- Prioritize and improve information technology to better meet future technology-related needs of the institution
- Explore new business and administrative processes that serve faculty, staff, and students with the highest degree of service and efficiency
- Improve research administrative processes at all levels and within all units
- Develop processes and practices that enable Academic Affairs to more nimbly update curriculum, solve problems, and work collaboratively across disciplines in order to better meet the needs of future learners
- Explore changes in long-range space, facility, and capital improvement planning, including deferred maintenance plans; and assess campus planning efforts with the community to regularly make improvements
Theme 6: Implement a Bold Advancement Agenda

Goal 6 Elevate the stature of the University through robust and bold strategic advancement initiatives designed to establish a strong and sustainable financial and marketplace position.

• Engender a University culture of philanthropy through strong partnerships
• Maximize the effective working partnership between the URI Foundation and the University, leading to the launch of a comprehensive campaign
• Leverage University relationships to expand the pool of individual, alumni, Foundation, and corporate prospects and donors
• Ensure a cutting-edge infrastructure that supports a robust advancement operation
College/unit response to reductions at various levels

- delivery of curriculum
- careful examination of arguments
- class sizes
- protection of academic programs
- preservation of enrollments
- achievement of learning outcomes
- innovative sharing of resources among college
- reconfiguration of staff
- protection of higher priorities
- highlight low priorities
BUDGET REDUCTION PRINCIPLES
ADOPTED BY SENIOR TEAM AND STRATEGIC BUDGET & PLANNING COUNCIL

- Ensure a quality education and experience for all students
- Protect our primary general revenue streams by ensuring quality in the timely delivery of the curriculum and by ensuring quality in all student services, i.e. housing, dining, bookstore
- Ensure the safety of students, staff, and faculty
- Minimize across the board reductions
- Sustain diversity initiatives, including Talent Development
- Sustain our financial aid investment as a key element of attracting students
- Invest in initiatives that enhance our ability to generate other income and resources
Chartfield String

Fund  100
Dept  XXXX  4 digit dept identifier
Program  XXXX  Is 0000 unless it is a program within a dept

Program Examples:
1000  Faculty Development
2000  Expenses related to Course Fees
1100-11XX  Start Up Funds
Identifies the category for budgets that include multiple accounts

Example:

Budget Account Codes
SUMRCNT Summer Re-contracting
  Summer Research

https://web.uri.edu/budget/resources
Scroll down to account code descriptions
ACCOUNT CODES

Identifies the type of revenue or expense

Examples:

5323  Office expenses/supplies
5276  Summer Re-contracting
5277  Summer Research

https://web.uri.edu/budget/resources

Scroll down to account code descriptions
BUDGET TRANSFERS

Departments may now submit their budget transfers by email to the Office of Budget & Financial Planning.

- Download budget transfer form (updated 7/29/2019)
- Submit form via email to budget_transfers@etal.uri.edu

Transfers only permitted within each Fund
Creating a New Chartfield

- https://web.uri.edu/budget/forms/
- https://web.uri.edu/budget/frequently-asked-questions/

The above link will take you to various forms, including the form to create a new Chartfield String; instructions are included and in addition to completion of the form, the following must be included:

1. A memo/short writeup justifying the need for the new CFS and any other pertinent backup info
2. Signature Authorization Form
3. Budget by Alpha Account
Signature Authorization Form

Required for establishing new Chartfield Strings. Updates to existing CFS Signature Authorization should be processed online using the Signature Authorization Update Form in e-Campus Financials.

Personnel whose name & signature appear on this form are authorized to approve processing, for items indicated on this Chartfield String only, by checking off the appropriate Document Code check boxes. If any designated signatories signature is missing their information will be excluded from entry and can be added by Department using online Signature Authorization update form.

Responsible Person
Employee ID #
Title:
Signature:

Contact Phone Number:
Contact Email:

Designated Signatories
Name:
Employee ID #
Title:
Signature:

* = Delegate required on all Chartfield Strings - serves as back up for Signature Authorization Update Form approval

Level 1: Designated Signatories for the checked off Document Codes; If Document Codes 1, 2, 3 or 4 are checked off it also means that the Signatory will serve as an approver

Final Review (Level 2): ChartField Strings can be assigned an optional Final Review approver(s) which adds another level of approval authority for electronic work flow routing. If Final Review is selected a backup signatory must be selected to cover when the primary Final Review approver is absent i.e. sick/vacation etc.

Document Codes:
1. Requisitions (LY, CR, IV, SC)
2. Invoice Voucher/Payment Order
3. Travel Authorization Request - TA
4. Expense Report - ER
5. Receiving Report
6. Payroll Authorization - Biweekly Time

URI Foundation (Fund 401 only)
Approved by: ___________________________ Date: ___________________________

Budget & Financial Planning Office or Office of Sponsored Projects (any CFS w/ Project #)
Entered by: ___________________________ Date: ___________________________

Revised April 2017
To add or remove individuals from having signature authorization, it may be done electronically:

- Sign into financial system and follow the path below:
  - Main Menu > URI Menu > Signature Authorization > Sign Auth Update Form
The University Budget and Planning Council shall provide a new, transparent and inclusive process for the planning, budgeting and assessment of university strategic directions, investments, and facilities. The Council shall be advisory to the President. It will ensure that the University's strategic plan and mission guide resource allocations and investments.
To obtain security access to:

Financial System:


Human Resource System:

Identify all sources designated for the dept and the purpose of each funding source and possible restrictions (e.g. Foundation funds for an endowed chair)

- Some CFS’s may have balances from prior year
- Meet with the previous chair
- Meet with your College Business Manager
- Meet with your Dean/Associate Dean
- Contact the Budget & Financial Planning Office
• March – All day meeting with Deans

Deans highlight

➢ Unit’s mission
➢ Relationship between unit’s plan and overall University priorities
➢ Summary of unit investment strategies and areas of reduction if necessary

• Ensure transparency across unit. Provide informational basis to encourage cross unit collaboration in education, research, outreach and administrative functions.

• Faculty Senate Leadership Participates
BUDGET REDUCTION PRINCIPLES
ADOPTED BY SENIOR TEAM AND STRATEGIC BUDGET & PLANNING COUNCIL

➢ Ensure a quality education and experience for all students

➢ Protect our primary general revenue streams by ensuring quality in the timely delivery of the curriculum and by ensuring quality in all student services, i.e. housing, dining, bookstore

➢ Ensure the safety of students, staff, and faculty

➢ Minimize across the board reductions

➢ Sustain diversity initiatives, including Talent Development

➢ Sustain our financial aid investment as a key element of attracting students

➢ Invest in initiatives that enhance our ability to generate other income and resources