

Budget Manager's Meeting
Agenda
Tuesday, March 13, 2007 (10:00 AM)

----- *FY 2006-07* -----

- **Mid-Year 1-Time Allocations (Excess Receipts)**
 - VC's finalized yesterday / my 3/12/07 E-Memorandum informed campus
 - Details on Shared –Drive:
 - UNCW\Sammy\departments\University Budget\06-07 MYR Allocation
 - Need Banner fund/account codes for all funded issues – **NLT Wednesday**
 - After BD-606 approved by OSBM, Budget Office will notify divisions and prepare Budget Revisions
 - *As items are completed, divisions are required to inform Budget Office*
 - *Unused funds will be pulled back to University level*
 - Remember...if funded and cannot be completed by 6/30/07, departments are responsible for funding in future

- **2.5% SRCI Carry Forward**
 - VC's approved change in policy last week
 - Divisions/departments now authorized to carry forward 2.5% of PERMANENT operating budget into next fiscal year
 - Applies to Banner acct codes 92xxxxx – 96xxxxx
 - How do we handle departmental year-end “negatives”?
 - We promulgate memo to campus late next week

----- *FY 2007-08* -----

- **FY 2007-08 Annual Allocations**
 - Permanent (Enrollment Growth) and One-Time funds
 - Guidance Memo due out Wednesday (3/14)
 - Requests due back to my office May 14 (gives divisions 2 months)
 - Additional due dates
 - New position – input to HR by April 9
 - Facilities – inputs to Facilities by April 1
 - HR / Facilities will notify depart/Bgt Ofc NLT May 1
 - Revised template – shared drive:
 - UNCW\Sammy\departments\University Budget\07-08 Allocations
 - Submission procedure

----- **Miscellaneous** -----

- **Budget Office Personnel Changes**
 - Amy has assumed EPA responsibilities
 - New Budget Analyst position – finished interviews, hope to fill in 3 weeks

- **Training**
 - *Detailed HR Screen training (BGT 107)*
 - Scheduled April 5 (10:00AM); April 12 (2:00PM)
 - Email will go out to those employees with HR access
 - *Understanding the UNCW Budget System (BGT 106)*
 - My 3/7/07 email details the scheduled dates
 - Subcommittee formed to look at automation
 - Until then will continue to use excel spreadsheets
 - I will present to large groups if requested
 - Power Point on Budget Office website

- **Future Budget Managers' Scheduled Meetings**
 - Thursday, May 10, 2007 10:00 – 12:00 AL 215
 - Thursday, July 12, 2007 10:00 – 12:00 AL 215
 - Thursday, September 13, 2007 10:00 – 12:00 AL 215
 - Thursday, November 15, 2007 9:00 – 10:30 AL 215