

Budget Office Staff Assignments	Budget Office Staff Assignments	Budget Office Staff Assignments	Budget Office Staff Assignments	Budget Office Staff Assignments
Internal Budget Development	Internal Budget Development	Internal Budget Development	Internal Budget Development	Internal Budget Development
Leslie	Ralph	Susie	Wendy	Lori Anna
<ul style="list-style-type: none"> Fee Requests Initiative Requests User Fees Tax assessment workbooks/ allocation factors Senior administration and BOT presentation reports BOT book General Fund Unit analysis, as needed Calendar & Work Plan Develop all templates and memos Review weekly tuition reports Reconcile tuition by semester 	<ul style="list-style-type: none"> Line item base budget file creation Control sheets/ reconciliation Initial templates for BOT book Service units Base Budget BD's Auxiliary units Designated Funds System Campuses - Senior and Regional School of Medicine Reconcile tuition by semester Comparative, analytic reports, as needed 	<ul style="list-style-type: none"> Academic Units Five Year Budget Model Tuition and fees Training Selected Service Units Comparative, analytic reports, as needed Assist with campuses as needed Monthly Tax JE Direct charge JE Tax - Budget Allocation Factor, FTE Baseline Assist with School of Medicine 	<ul style="list-style-type: none"> Tuition report - weekly Line item base budget file creation Templates for BOT document Base budget BD's Pay package and fringe impact and workbooks by unit Tuition and Fee Request System with user guide Initiative Request System with user guide TERI Information and Five Year Summary Reconciliation of preliminary base budget Preparation of annual base budget Webpage updates and liaison to eBusiness Tax - Credit Hour Factor 	<ul style="list-style-type: none"> Clerical support General data entry, as needed Schedule meetings and workshops Assist in tracking legislation Prepare all department notebooks Coordinate printing of BOT book Prepare folders/files

External Budget Development	External Budget Development	External Budget Development	External Budget Development	External Budget Development
Leslie	Ralph	Susie	Wendy	Lori Anna
<ul style="list-style-type: none"> Review state line item budget Develop line item budget assumptions Below-the-Line submissions Fiscal Impact statements Governor's Budget submission (fall) Governor's Budget response (January) Monitor Appropriations Act/ Legislations MRR Needs CHE ad hoc requests Review all CHE reports Agency Activity Inventory Review Baldrige Accountability Report 	<ul style="list-style-type: none"> State budget process - Full System CHE - Academic Fee Calculation Baldrige Accountability Report Information Other CHE reports, as needed Governor's Budget submission (fall) - campuses Review monthly report on state line item budget actual Comparative, analytic reports, as needed 	<ul style="list-style-type: none"> Coordinate information about state process to units Assist with State budget process, as needed Comparative, analytic reports, as needed CHE 150 Report Governor's Budget submission (fall) - campuses 	<ul style="list-style-type: none"> State Budget Process all Crystal reports all Excel files coordinate entry into system Prepare PowerPoint presentations Routine data analysis and spreadsheet preparation Various Unit workbooks, as needed Governor's Budget submission (fall) Baldrige Accountability Report 	<ul style="list-style-type: none"> Clerical support General data entry, as needed Schedule meetings and workshops Assist in tracking legislation Prepare all department notebooks Prepare folders/files Legislative updates

Budget Execution	Budget Execution	Budget Execution	Budget Execution	Budget Execution
Leslie	Ralph	Susie	Wendy	Lori Anna
<ul style="list-style-type: none"> Monthly reconciliation of resources General Fund Review all unit fall and spring reviews Review all unit carryforward estimates Campuses mid-year review Review all unit variance analyses Coordinate state deposits with Controller's Office Meet with units as needed Administer Budget Update Group Meetings 	<ul style="list-style-type: none"> Service units Auxiliary units Monthly A fund reconciliation Fall and Spring Reviews Carryforward estimates Meet with units as needed E funds - set up, monitor and review at least 2X year Review scholarships and prepare entries IDC account 62020E100 JE for Research budget Variance Analysis BOT Quarterly Reports System Campuses - Senior and Regional School of Medicine Mid-Year Reviews - Campuses & Auxiliaries 	<ul style="list-style-type: none"> Tuition and Fee analysis Training Fall and Spring Reviews Carryforward estimates Meet with units as needed Advancement BD's Selected Service Units Variance Analysis Comparative, analytic reports, as needed Assist with campuses as needed Monthly pre-set JE Direct charge JE Assist with School of Medicine 	<ul style="list-style-type: none"> Tuition report - weekly Enrollment analysis, as needed Prepare PowerPoint presentations Various Unit workbooks, as needed Webpage Prepare and maintain databases Routine data analysis and spreadsheet preparation 	<ul style="list-style-type: none"> Clerical support General data entry, as needed Schedule meetings and workshops Special Projects Schedule meetings and workshops CHE minutes and agenda Maintain responsibility unit files

Training and Other	Training and Other	Training and Other	Training and Other	Training and Other
Leslie	Ralph	Susie	Wendy	Lori Anna
<ul style="list-style-type: none"> Brown Bag lunches - academic and service units Budget Manual oversight University-Wide Budget Development training Special Projects Tuition Model - update Budget News Evaluate format and presentation of BOT document Items currently on hold New since last update 	<ul style="list-style-type: none"> Brown Bag lunches - academic and service units E Fund Training Unit training as needed Budget Manual items, as assigned Special Projects 	<ul style="list-style-type: none"> Brown Bag lunches - academic and service units A Fund Training Academic unit meetings - Fall and Spring Unit training as needed Budget Manual items, as assigned Special projects 	<ul style="list-style-type: none"> Brown Bag lunches - academic and service units Preparation and update of training materials Budget Manual items, as assigned Special Projects Webpage Liaison to eBusiness Prepare PowerPoint presentations 	<ul style="list-style-type: none"> Coordinate workshops, meetings Other duties as assigned Maintain Budget Manual Budget News