

**Index: A10628 Budget and Planning**

**Purpose of Area**

Preparation of University's academic operating budget including general, designated, auxiliary, and capital funds. Provides analytical support for planning and decision making. Maintains position control function. Monitors budget versus actuals for major categories. Enforces budgetary policies for the university. Processes budget amendments as well as budget transfers. Assists in general fee process. Coordinates: student fees for board of trustee approval; the hospital budget load and documents; and works with the controller's office on the quarterly financial reports.

**Tie in with Strategic Plan**

Assist the University in achieving its overarching strategic goals by helping to ensure the financial viability of the organization.

**Employees**

	Responsible for the day-to-day operations of the budget office. Provide strategic direction and guidance to budget office staff and business managers. Develop staff goals and objectives. Ensure excellent customer service and follow-up by budget office staff.
McBride, Joyce, Director	
4 budget analysts	Each analyst is assigned to a variety of areas of the university in order to perform the tasks listed above. In the "purpose of area" section.
1/2 time student worker	

**Revenue - N/A**

**Operating Budget**

**Planned Usage**

Supplies	purchases used in support of normal office activities (paper, pens, etc.)
Travel	Continued professional development
Info/Communication	Printing costs mostly associated with budget preparation

**Helpful Statistics**

Indexes monitored in FY11: 428 general fund  
 599 designated fund  
 104 auxiliaries

In FY11 budget office staff processed:  
 approx. 2500 position forms in the past year  
 208 budget amendments  
 approx. 1600 budget transfers