

June 16, 2019

## **Budget Council Annual Report**

Since there were no nominees for chair who could take on the duties in the Fall semester, the previous chair, Meera Sitharam continued as chair for the fall semester. Serdar Kirli, was nominated in the September meeting and in a subsequent meeting unanimously voted in as chair starting from Spring 2019.

During the September meeting, the charge of the budget council was reviewed for new members. In order to ensure unfettered login access by faculty and staff to the financial transparency portal and related documents that the budget council, directions for Department security (IT) admin to assign the "Universal HR role" to were to be posted on the budget council website.

In the October meeting, decisions were made on various administrative officials who would be invited for a session with the budget council. Due to several questions concerning the assessment of administrative conflict of interest and accountability for resource allocation and concerning what colors of money (funds) were used to pay for faculty with different types of appointment (research, teaching, administrative, clinical), it was decided to invite the Provost. Due to a question referred to the budget council from a faculty member concerning P-card spending, the Chief Procurement Officer would be invited. Due to questions about units that rely on funding from Division of Student Affairs, as opposed to E&G funds, a spokesperson from Student Affairs would be invited. Due to questions about the relationship between the resource allocation and supervisory structure of HR-related staff in colleges and departments (as opposed to central support units), Chief of HR, would be invited. Finally, due to confusions about various types of online education modalities within UF (self-funded, Ufonline, offbook etc.), it was decided to invite someone from Ufonline.

To increase faculty awareness, the Faculty Senate Chair suggested the council chair send the portal details as outlined below to the Provost newsletter and UFHR Communication Services and WorkLife for publication in those two mediums. The UF Faculty Senate Secretary was to add this to her to-do-list every Fall.

*The University Faculty Senate Budget Council worked with the help of the University Financial Office and University Budget Office over several years to summarize unit-wise financial information. The goal was to make information (that is under sunshine) available in a faculty-friendly form. The result of this work is available on the budget council page:*

**Unit-wise E&G Budget Allocations including Direct Allocations of non-E&G revenues (REQUIRES GATORLINK LOGIN):**

- [Budget allocations to Colleges and Departments \(includes active grants\)](#)

- [Budget allocations to Central Admin support units](#) (includes active grants and other non-E&G revenues) (instant snapshots of allocations, year-to-date expenditures etc.) Unit-wise Tuition revenues (used to compute E&G revenue)

- 5 Previous years' snapshots (from the End of the year, Beginning balance, Revenues, Ending balance , starting 2018) for each of the above

- Tuition Revenues by Department (Last 5 years, starting [2015](#))

- [Tuition Revenues by College](#) (Last 5 years, starting 2015) (used for deciding allocation to colleges for subsequent AYs)

- Department-Major correspondence used to compute Tuition revenue (Last 5 years, starting [2016](#))

- Department-Course number correspondence also used to compute tuition revenues (Last 5 years, starting [2018](#))

### **Tutorials (text and video) on**

- How to use the above resources:

- \*\*\* [Video tutorial](#) to using the UF(Colleges) financial transparency portal

- \*\*\* [Text guide](#) to the UF (Colleges) Financial Transparency Portal

- Method used to compute Budget allocations to colleges based on their E&G revenues (E&G Budget allocations to departments are decided by college deans. Any documentation on such decision-making - if made available to the budget council by college deans or councils - will be linked from the budget council page)

The November meeting was primarily a discussion with the provost on the following items decided in the October meeting (1) Update on pre-eminence hires. Has hiring concluded? Have hires been generally successful in securing grants and resources to support their research and employment? (2) Update on allocation and filling of the 500 new faculty positions. (3) Decision-making related to allocation to units with no E&G revenues, including those funded by student fees etc.(4) Conflict of interest in resource allocations (or more generally - accountability of resource allocations).(5) Off-book programs / on-line course teaching rules and practices.(6) Clarifications and updates on the Platform for Life, Moonshots, etc. [See minutes](#).

The December meeting was cancelled.

During the Spring semester of 2019, Budget Council followed through with the decisions made in the fall and continued to look into how various units within the university allocate their resources as well as

budget issues that are relevant to faculty. The following guests were invited to present in Budget Council meetings:

January: Lisa Deal, Assistant VP and Chief Procurement Officer

February: Dr. Andy McCullough, Associate Provost for Teaching and Technology  
Dr. Brain Marchman, Assistant Provost and Director of Distance & Continuing Education

March: Norb Dunkel, Associate VP for Student Affairs

April: Evangeline Cummings, Assistant Provost and Director of UF Online (cancelled)

In the January meeting, the Council's focus was on the overview of procurement card (P-card) program and the recent changes to purchase limits. The discussion included the rationale for the changes as well as the methodology in determining the updated limits and the mechanism for the faculty to request an increase to their limit.

In the February meeting, our guests, Drs. McCullough and Marchman, provided insight into Online Education at UF. Clarity was provided regarding the vernacular and confusion over the definition of the terms: self-funded; off-book; unfunded; and self-supporting programs, which all refer to courses or degrees which are delivered using online modalities. Various statistics were provided regarding the Online and Self-funded programs, including enrollment trends. Financial activity in the Auxiliary Fund associated with self-funded programs was also discussed. An overview of the approval process for a self-funded program was also provided. The committee received detailed information on all the factors and consideration involving the approval of such a request.

In addition, UF policies and reporting requirements of 'above load' or 'at will' work was briefly discussed as well as how faculty workload and assignments are managed (above load, at will, etc.). Discussion was also held regarding the challenges of providing services for UF online students, who can optionally pay fees for UF services such as counseling center.

In the March meeting, the committee inquired about the budget allocation within the Division of Student Affairs. Our discussion revolved around different revenue sources and how various services are funded from these sources. The issue of a lack of revenue increase (due to a freeze in student fees) and its impact on various services provided by Student Affairs was discussed.

Our April meeting was cancelled due to a sudden schedule conflict of our guest.

[Meera Sitharam](#)

Budget Council Chair (Fall 2018)

Serdar Kirli, Ph.D.

Budget Council Chair (Spring 2019)