

BUSINESS MANAGERS & HUMAN RESOURCE MANAGERS RETREAT

August 18, 2010

*Together we are building the future of
Carolina.*



Think of the possibilities.

Vision

The College of Arts and Sciences transforms the lives of our students and improves the world by creating and sharing knowledge at the frontiers of the fundamental fields of inquiry.

Agenda

- ❖ Introductions and Announcements
- ❖ FY11 Budget Execution
- ❖ FY12 Budget Development
- ❖ Q & A

BREAK

- ❖ Fiscal Overview
- ❖ Q & A



INTRODUCTIONS

(Dean's Staff)



ADMINISTRATIVE CHANGES

Reorganization of Academic and Fiscal Planning

- ❖ **Dr. Sonya Brown, Dean of Academic & Fiscal Planning**
 - Strategic and Fiscal Planning
 - Budget Development and Execution
 - Enrollment Management
 - Space and Facilities
- ❖ **Linda Mabry, Budget Manager**
- ❖ **Timmy Anne Ferguson, Budget Analyst**
- ❖ **Academic Planner (*search in progress*)**
- ❖ **John Moring, Coordinator for Space Planning**

ADMINISTRATIVE CHANGES

Reorganization of Human Resources

- ❖ **Charmane Daugherty, Director**
 - Directs and coordinates all HR and administrative operations in the College
 - Directs and coordinates the Tenure and Promotion process within the College
- ❖ **Susan Illingworth, Staff Human Resource Manager**
- ❖ **Penney Bell, Faculty Human Resource Assistant**

**FORMATION OF THE
DEAN'S CLASSIFIED
STAFF ADVISORY
COMMITTEE**



INTRODUCTIONS (Participants)

**Name,
Department,
Favorite Leisure Activity**



Announcements

- ❖ ***Hiring Freeze***
 - ❖ ***Student Positions***
 - ❖ ***TFAC Positions***
 - ❖ ***FTE Positions***

- ❖ ***Procedural Consistency***

- ❖ ***We need your help!***



FY11 Budget Execution

- ❖ ***Final Post-close for FY10 – July 31***
- ❖ ***Budget Loaded to USC Accounting System – August 1***
- ❖ ***Ability to post BD transactions – Begins again Mid-August***
- ❖ ***Start of the Fiscal Year Clean-Up – Mid Fall***
 - ❖ ***Calculation and posting of Carry Forward***
 - ❖ ***Addition of New Hires***
 - ❖ ***Salary Adjustments for promotions***
 - ❖ ***Funding Adjustments for Instructional Staffing***
- ❖ ***Personnel and salary review – October and March***
 - ❖ ***Please review your rosters very carefully***

FY11 Budget Execution

- ❖ *Quarterly E Fund review – months ending September, December, March, & June*
- ❖ *Quarterly restricted fund review – months ending October, January, April, & July*
- ❖ *Semi-annual A Fund budget review – months ending October & March*
- ❖ *Semi-annual A Fund FT salary review – months ending September & February*
- ❖ *Semi-annual Educational Foundation review – conducted in July (scholarships) & January (all other accounts)*

FY11 Budget Execution

- ❖ *Semester credit hour review – after final drop/add date*
- ❖ *All Funds Budgeting Exercise – Request for information in September, due in October*
- ❖ *Undergraduate Lab account reviews – course listings, enrollments, spending – March*
- ❖ *Time & Effort Reporting – call issued by grant account in mid-August & mid-February*



FY12 Budget Development

❖ **Graduate Assistantships**

- ❖ *Call for Information – Sept 24*
- ❖ *Submissions Due – Oct 22*
- ❖ *Allocations Made – Nov 17*

❖ **Summer School**

- ❖ *Call for Information – Nov 24*
- ❖ *Submissions Due – Jan 7*
- ❖ *Allocations Made – Jan 14*

❖ **Non-Tenure Track Positions**

- ❖ *Call for Information – Nov 30*
- ❖ *Submissions Due – Jan 12*
- ❖ *Allocations Made – Jan 26*

❖ **TFAC**

- ❖ *Call for Information – Nov 30*
- ❖ *Submissions Due – Jan 14*
- ❖ *Allocations Made – Jan 26*

FY12 Budget Development

❖ ***Faculty and Staff Salary Review***

- ❖ *Call for Information – Oct 25 / Mar 2*
- ❖ *Submissions Due – Nov 12 / Mar 25*

❖ ***Operating Budget Review***

- ❖ *Call for Information – Mar 2*
- ❖ *Submissions Due – Mar 25*

❖ ***Lab Fee Review***

- ❖ *Call for Information – Mar 2*
- ❖ *Submissions Due – Mar 25*



Who Does What?

- ❖ ***Linda Mabry***
 - ❖ ***Carry Forward***
 - ❖ ***All-Funds Budgeting***
 - ❖ ***Financial Reviews***
 - ❖ ***Risk Account Liaison***
 - ❖ ***Request Departments to Budget IITs and Revenue***

- ❖ ***Timmy Anne Ferguson***
 - ❖ ***Commitments***
 - ❖ ***Lab Fees***
 - ❖ ***Process BDs and JEs***

- ❖ ***Sonya Brown***
 - ❖ ***Budget Development***
 - ❖ ***Coordinate Response for University Calls for New Fees and Initiatives***
 - ❖ ***Faculty Workloads and Curricular Plans***

Who Does What?

- ❖ ***John Moring***
 - ❖ ***Space and Facilities Management***

- ❖ ***Academic Planner (search in progress)***
 - ❖ ***Graduate Assistants***
 - ❖ ***TFAC***
 - ❖ ***Non-Tenure Track***
 - ❖ ***Summer School***
 - ❖ ***Track Credit Hour Production***

- ❖ ***Charmane Daugherty***
 - ❖ ***All HR Actions***
 - ❖ ***NOTE – Continue to send materials to Susie Illingworth and Penney Bell as you have in the past.***

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ARTS & SCIENCES

Q & A



COFFEE BREAK!

15 Minutes



THE NEW NORMAL:

Opportunities in Times of Great Risk

Mary Anne Fitzpatrick, Dean



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IMPACT ON OUR COLLEGE



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WHAT'S THE IMPLICATION?



RECESSION CONTINUES TO BATTER STATES

The recession has caused a state fiscal crisis of unprecedented severity.

In the early 2000s, state fiscal problems lasted for several years after the recession ended.

The current recession is more severe — deeper and longer — than the last one.

The 2011-2012 University budget will – in all probability – be cut as severely this year.

WHAT ARE THE REALITIES?

- ❖ **The College's ability to come up with ½ of the cut is eroding.**
- ❖ **All College units are involved in the next exercise.**
- ❖ **The previous cuts were very painful.**
- ❖ **Unfortunately, the next cuts will affect the core of our mission.**

*“Great difficulties may be surmounted
by patience and perseverance.”*

-- Abigail Adams (1744-1818), U.S.
First Lady



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Q & A

