




Department of Planning, Budget & Analysis

MEMORANDUM

TO: David J. Schmidly, President
Chaouki T. Abdallah, Interim Provost/EVP for Academic Affairs
David W. Harris, EVP for Administration, COO and CFO
Henry Nemcik, President & CEO, UNM Foundation
Julia Fulghum, VP for Research & Economic Development
Helen Gonzales, VP for Human Resources
Paul Krebs, VP for Athletics
Ava Lovell, VP for HSC/UNM Finance/University Controller
Eliseo Torres, VP for Student Affairs

DATE: July 1, 2011

FROM: Andrew Cullen, AVP Office of Planning, Budget and Analysis 

RE: **Main and Branch Campus Fiscal Year 2012 UBPP 7000 Policy Review**

Each year Main Campus departments prepare a UBPP 7000 report, in accordance with Regent policy, that is then summarized by each VP unit and forwarded to the Office of Planning, Budget and Analysis (OPBA) for presentation at the November Regents' meeting.

The Categorization of Fund Balance (CAFB) system in Banner Self-Service allows departments and colleges to categorize their fund balances. Branches, Colleges and Departments will be required to use this system. The system will open on August 1.

Please forward this information to your AVPs, Deans and Directors so they can in turn communicate the essence of the UBPP 7000 policy to their respective Chairs, Directors, Managers and Faculty. Any questions or concerns can be communicated directly to the Office of Planning, Budget & Analysis. We will be sending out another memo to each VP fiscal representative copied on this email. The memo will include detailed instructions and information about UBPP 7000 procedures, the Fund Balance Categorization application, calendar dates and deadlines, the overview presentation, working sessions, and resources available to support the process. We appreciate your assistance.

cc: Norma Allen, Assoc. Director, University Budget Operations, OPBA
Regina Dominguez, Financial Analyst, Budget Operations, OPBA
Nicole Dopson, Accountant 3, Provost Office
Kate Green, Financial Officer, VP Research and Economic Development
Rodney Harder, CFO, UNM Foundation
Kim Kloeppe, Manager, Div. Support Services, VP Student Affairs
Kate Moore, Financial Officer, Provost Office
Curtis Porter, Associate VP for Budget, Planning and Analysis, Provost Office