

NC STATE UNIVERSITY


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June 9, 2009

MEMORANDUM

TO: Executive Officers and Deans

FROM: Charles D. Leffler 
Vice Chancellor for Finance and Business

SUBJECT: Revised Budget Planning Guidelines for Presentations

We are planning for the series of meetings on 2009-10 budget reductions, which begin in approximately two weeks. We want to make the best use of the time we will have together, so we have modified the guidelines for the document you are preparing (revised attachment 2 enclosed) and offer a suggestion for our meeting.

The revised instructions call for more contextual information and an impact statement. This information will be very helpful to our team, especially to our new interim provost and interim chancellor. The materials will be reviewed prior to the meeting to make the best use of the limited time.

Please send the documents to Barbara Moses by noon Monday, June 15, 2009. Submission should include no more than two pieces: an MS-Word document containing the narrative and an Excel spreadsheet (attachment 3) containing the budget information.

During the meeting, please plan to spend no more than half of the allotted time to present an overview of your budget reduction proposals. This will allow sufficient time for discussion. You are welcome, but not required, to bring your budget officer and one or two other individuals. Warwick, Terri, and I will be supported by several staff members: Barbara Moses, Vicki Pennington, Betsy Brown, Steve Keto, and Karen Helm.

Please do not hesitate to direct questions to any of us, especially if it will help focus the meetings productively. If follow-up meetings are necessary for a fuller understanding of strategies and proposals, we expect to schedule them in early July. You might also receive questions to clarify points that would not require a meeting.

The May 28 memo and attachments are posted at Budget Central (http://www.fis.ncsu.edu/rm/budget_central/).

cc: Interim Chancellor James H. Woodward, Jr.
Interim Provost Warwick A. Arden

Attachment 2: Guidelines for Preparing the Narrative
Revised June 9, 2009

Prepare a set of proposals that address the points below. Submit a focused narrative – including Context, Other Shortfalls, and Proposed Actions – with the budget template described in Attachment 3 via email to Barbara Moses no later than noon, Monday, June 15.

1. Context

a. Unit Overview

Provide a brief overview of your unit by identifying the most critical functions or programs that are central to its mission. In broad terms describe your strategy for developing your reduction proposals. Briefly describe how you involved faculty and/or staff in developing your proposals.

b. Unit Profile – Colleges Only

University Planning and Analysis will send you a profile of your college or division by June 10. In two pages or less, please comment on your Unit Profile. Direct attention to special qualities you want to emphasize, and explain any anomalous trends or measures. If you like, feel free to add additional measures and trend data that you find useful for managing your resources and tracking performance; please include them *only* if you also provide the data.

2. Other Shortfalls

Describe any shortfalls you anticipate next year in addition to the reduction in state appropriation, such as endowment earnings, F&A receipts, or critical trust funds. Explain how you will accommodate the loss to your working budget.

3. Proposed Actions

- a. Given this background, what activities will you reinvent, reorganize, consolidate, eliminate, or reduce to achieve your assigned planning target? Describe your proposed actions, limiting your narrative to one page or less per activity. Avoid shifting costs from state appropriated budgets to non-appropriated funds.
- b. Summarize your budget reductions using the template in Attachment 3, listing the activities in priority order (#1 is the first to implement) and identify the recurring and/or non-recurring dollar savings in each of the next two years (Fiscal Years 2009-10 and 2010-11). Note that the permanent savings goal should be reached by June 30, 2011.
- c. If implemented, what would be the impact of these proposals, individually and cumulatively, on your ability to achieve your mission?