



Vice Chancellor for Business Affairs
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MEMORANDUM

To: UNCP Faculty and Staff

From: R. Neil Hawk, Vice Chancellor for Business Affairs *R. Hawk*

Date: September 1, 2009

Subject: Spending Guidelines for 2009 – 2010, applicable only to State Funds

As of today our 2009-10 budget reduction plan of 5.5% (\$3,709,077) has been completed and awaits approval by General Administration (GA) and the Office of Budget and Management (OSBM). This plan will be posted on the Business Affairs web page within a few days. As explained in the town hall meetings aspects of our 5.5% plan were pulled from the 10% budget reduction plan shared with GA in July 2009.

The second phase of our 2009-10 budget management process is how to accommodate the 5% reversion mandated by our Governor. We continue to work on the reversion plan and should have more news within a week or two.

In the meantime we want to assist departments with their budget needs and the operations of their units. First, let me say that Governor Purdue's Executive Order 20 was lifted. However, OSBM has provided all State Agencies with suggested operational guidance by saying, "OSBM strongly encourages your agency to continue holding positions vacant where appropriate; limiting the issuance of purchase orders for goods or services (only minimum inventories should be maintained); and restricting travel and compensations adjustments (promotions, reclassifications etc.) to the maximum extent possible. All travel and compensations adjustments must be reapproved by the agency head." Therefore, UNCP's Senior Staff developed the following spending guidelines and budget management suggestions based on OSBM's direction:

- First and foremost manage your budget wisely and prudently at all times.
- Approve request for expenditures only up to the approved budget level, or process a budget transfer request as needed
- Travel requests shall follow the following guidelines:
 - Essential in-state travel may be approved by the appropriate VC
 - Travel associated with student recruitment will be authorized

- No out-of-state travel unless first approved by the appropriate VC and authorized by the Chancellor prior to obligating funding; favorable consideration will be given to travel associated with accreditation, conferences where an employee is presenting, or when a faculty member is presenting and the travel is specifically associated with promotion and tenure consideration.
- Purchases of equipment and/or services (with budget available) that exceed \$2,500 required the approval of your VC prior to entering requisitions
- Discussions between the appropriate VC and the Chancellor will take place prior to engaging in any actions pertaining to filling of vacant positions. Written justification and the Chancellor's written approval will be required prior to advertising any vacant position.
- Personal Service Contracts, other than those for part-time faculty, must be approved at the VC level and available funds certified by the Budget Office prior to offering payment for any services.

While we would like to address all budget situations and anticipate all questions pertaining to the management of your budget, obviously we know this is not possible. Therefore, if you need additional assistance please contact the appropriate person from the list below, pending the area of your inquiry:

- Pam Barkett (ext 6279), personnel related issues
- Roger Killian/Marvin Miller (6326/6803 resp.), general budget questions
- George Guthrie/Ray Oxendine (6509/4080 resp.), accounting issues
- Denise Carroll (6337), purchasing related issues

You may also feel free to call me at extension 6209 if I can be of assistance.

Thank you for adhering to these general guidelines. Your cooperation is imperative for UNCP to continue to operate within our budget and meet the State's rules and regulations.