

May 01, 2018

Memorandum

To: Division Budget Managers

From: Deborah S. Adishian-Astone
Vice President for Administration and Interim Chief Financial Officer

Pamela Lewis
Budget & Resource Planning Manager

Subject: 2018/2019 Phase I Budget Allocation Process

The Phase I Budget is necessary for all divisions to update *how* you wish to budget your salary and wage resources for the coming year. To complete the Phase I Budget process, a current Budget/Expenditure report will need to be printed for all of the departments in your divisions. This will become your working copy to be used for final submission. An additional column will need to be inserted with the heading, "Requested Change". All other columns can be deleted or hidden for this process. Please complete the column with the heading "Requested Change" with any corrections you would like to make to the current Budget Levels. This information pertains to all funds. Some funds may be missing because they were not budgeted for last year. If this is the case, please insert a row(s) or worksheet(s) and add the information required.

If you are budgeting at the Appointment Level and you have an employee(s) who is not listed on the spreadsheet, please insert a row and specify the Budget Level information required. This is also the time to request that an employee who has been terminated or retired be removed from the report. If a position has been eliminated due to a budget or workload reduction, please indicate as such on the spreadsheet.

If you are budgeting at the Pool Level, please make sure that you have a Pool Level Budget set up for each category of employee (i.e. Temporary Help, Management, Staff) and fund, (i.e. General Fund, Trust Fund) in your division/department.

Once you have established a budgeting level (i.e. Appointment, Pool, etc.) this level of budgeting will remain for the entire year. Remember this is just to identify the level budget detail you will be monitoring, *actual* Budgets will be requested at a later date.

Please complete all worksheets and submit them to the University Budget Office by June 8, 2018. If you have any questions, please feel free to call the Office of Budget and Resource Planning.

Office of Budget & Resource Planning

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