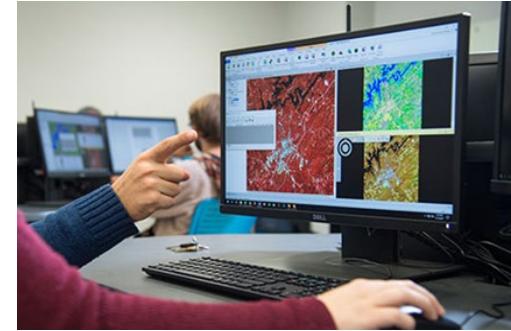


FY 24-25 Budget Development



Budget Manager Training

November 2024

JAX STATE
Jacksonville State University

Planning & Budget Development



Every year a department or unit will submit an operating budget request for the following academic year. This planning phase should reflect the overall priorities in alignment with the Strategic Plan. This phase includes an examination of prior year expenses, an analysis of changing conditions, and a review of trends.

Training

[Register for Upcoming Training Sessions](#) [Procedures and Instructions](#)

Budget development	+
Fiscal Year End Training	+
Finance Training Presentations	+

- Jax State level funded all request for FY2024-2025. Therefore, review unfunded O&M budget requests with your VP or manager to determine if the prior year request is still needed or should be updated.
- Budget Request Submission Threshold
 - de minimums level >\$1,000 or
 - 10% of overall Department Budgets < \$3000

- BUDGET DEVELOPMENT PLANNING CALENDAR**
- June/July
- President reviews and appoints new committee members to two-year term
 - Orientation Packet to New Budget Committee Members
 - Implement new or revised plans for CY budget for the beginning of Fall Term
 - Review NY Budget Worksheet/Program Review Update Forms
- August/September
- New staff contracts due to HR (prior to August payroll close date)
 - Budget Monitoring training to new Budget Managers
 - Budget development process for NY Tentative budget begins in September
 - Review Committee Charge
- October
- JSU BOT adopts Approved Budget for CY
 - Budget Managers to review budget package with appropriate Administrator(s)
 - Prepare the ACHE Budget Presentation (if required)
 - NY Budget Worksheet sent to Budget Managers after the October BOT Meeting.
 - Units submit Operational Plan reports to the Office of Institutional Research and Effectiveness (OIRE)
 - Division leaders submit Strategic Plan report to the President and OIRE.
- November
- Provide departments with information to complete the Request for Purchase Form, service, or capital projects (IT, or CP&F)
- December
- Review of budget requests
- January
- Begin compiling NY expense budget requests & priorities
 - Review PY reserves, revenue, & expenses after the audit report is issued (> January 15)
 - Begin development of the Budget Development Premise based on the Governor's January Budget (Year 3-4 of Governor Term)
- February
- Continue review of NY Tentative budget requests & compiling of data
 - New Position Requests due to PAC
 - Budget Managers make revisions-based feedback, then re-submit
 - Budget Plans Developed – Alternative Scenarios prepared for NY Tentative budget for Cabinet review
 - Begin development of the Budget Development Premise based on the Governor's January Budget (Year 2 of Governor Term)
- March
- ETF State Budget Report Issued
 - Complete NY Interim Budget
 - Sustainability Report
 - Begin development of the Budget Development Premise based on the Governor's January Budget (Year 1 of Governor's Term)
- April
- Submit NY Tuition, Fees, and Interim budget to BOT for approval¹
 - Returning Faculty Base Contracts due for position budgeting
 - Midyear CY review provided to Cabinet for review
 - Open Forum/Budget Bulletin
 - Respond to Budget Manager as to what requests will be approved
 - Faculty Senate President or Designee Appointment (annual)
 - Division leaders submit Strategic Plan status report to the President and OIRE.
- May
- Fiscal Health Check List

FY 2025-26 Budget Development Timeline

This timeline provides for position selection and budget proposal creation for the next academic year.

- **November 18, 2024** Deferred Maintenance/Renovation, Position & O&M budget development information sent to budget managers.
- **December 2, 2024** Deferred Maintenance/Renovation due to Cabinet member
- **January 7, 2025** O&M and Position Justification Request or Personnel Action Request Forms due Cabinet approval for approval
- **January 13, 2025** Divisional Budget Summary Form saved in the “*Approved*” folder (Cabinet Only) – due to Budget Committee February 3
- **January 20, 2025** Program & Course Fee Request due to Provost for approval
- **February 3, 2025** HR to communicate all approved faculty new hire and replacement positions for recruiting and personnel actions

RETURNING FACULTY

- **March 14, 2025*** Current faculty not returning for the next academic year shall submit a written resignation to his/her immediate supervisor (Full-time Faculty and Visiting Faculty: Faculty Handbook Section – TBA)
** Retiring Faculty also need to indicate if they are taking accrued leave for Fall or Spring - 12-month faculty who earns accrued leave.*
- **March 31, 2025** Departments initiate returning Faculty Contracts
- **April 4, 2025** Send out all returning Faculty Contracts and Department Head Letters (Only New or Changes)
- **April 14-15, 2025** Board of Trustees Meeting – Proposed Budget
- **April 21, 2025** All returning Faculty Contracts due to the Provost and Department Head Letters (Only New or Changes)
- **April 25, 2025** Signed returning Faculty Contracts and Department Head Letters (Only New or Changes) due to Academic Affairs/HR

New Year Faculty & Overload Salary FY 2025-26 Position Budget Timeline

The timeline below provides time for onboarding new faculty and assigning overload for the next academic term, if necessary. Adjunct contracts will have a different timeline based on course demand and full-time faculty assignments.

New Faculty	<u>FALL</u>	<u>SPRING</u>
• All new faculty contracts must be finalized by Provost*	July 31	November 20
• Any emergency new faculty contracts routed to faculty	August 8	-----
• Signed emergency contracts by faculty are due in HR	August 12	-----
• Payroll deadline for September paycheck payment	August 18	-----
• Classes begin	August 20	January 7
• Last day to register for all a class	August 26	January 13
• Submit overload contracts to Provost (after census)	TBA	TBA
• Send overload contracts to HR (after census)	September 17	TBA

* New faculty contracts received after the deadline will have the first paycheck available on October 1 (Fall) or February 1 (Spring).



Returning Adjunct Faculty

FY 2025-26 Position Budget Timeline

There are no final commitments related to adjuncts until their contract is returned for the respective semester(s) course. The below timeline provides time for advertising, application processing, selection, and onboarding new adjuncts or assigning overload for the next academic term, if required. Additional adjunct contracts can be issued based on course demand and full-time faculty assignments.

	<u>FALL/SUMMER</u>	<u>SPRING</u>
• Requests to fill anticipated adjunct needs	March 1	TBA
• Departments initiate returning Adjunct Contracts	March 31	TBA
• Begin initiating returning Adjunct Contracts	April 1	TBA
• Send returning Adjunct Contracts due to the Provost	April 18	TBA
• Signed returning Adjunct Contracts due to Academic Affairs/Human Resources	April 25	TBA
• Adjunct contracts must be finalized by Provost*	July 31	TBA

* Adjunct contracts received after the deadline will have the first paycheck available on October 1 (Fall) or February 1 (Spring).



Planning & Budget Development



Jacksonville State University's Budget is based on a fairly conservative budget approach. The budget will be developed in alignment with the Strategic Master Plan and Annual Operating Plan utilizing the Alabama Educational Trust Fund apportionment data and tuition projections.

- Guides budget allocation process in alignment with the Strategic Plan. Budget priorities aid in planning assumptions to facilitate timely decision-making.
- Expenditure planning assumptions priorities should be used with the division/department plan.



Student Success & Retention

Supporting current students to reach their educational goals.

- Student-Centric Focus
- Classroom Improvements
- Improve Student Outcomes
- Data driven

Capital Projects

Solutions to comply with regulations preserve the infrastructure's useful life

- Modernization of existing housing
- Investment in new housing
- Randy Owens Center (ROC)
- Tornado Recovery project closeout

Compensation Study

Continue achievable and fiscally responsible compensation plan

- Phase III salary adjustments
- Promotions & Supplements
- Job Families & Position Descriptions

Sustainability & Maintenance

Promote an energy-efficient campus while preserving the historic architecture

- LED Lighting
- Safety Compliance
- Preventive Maintenance

Fiscal Stewardship

Foster stewardship of facilities & financial resources

- Days cash on hand
- Reserve Restoration
- PEEHIP & RSA funding

Renovations Requests



the FRIENDLIEST CAMPUS *in the* SOUTH

FY 2025-26 Renovation Requests

Renovations commonly include infrastructure modernization, classroom improvements, conversion of classrooms to offices and vice versa, and lighting improvements. Most common requests are floor covering replacement, paint, electrical upgrades and cabinetry. Capital improvement projects are investments made to enhance the value of a property, while deferred maintenance refers to postponing necessary repairs or replacements. Deferred maintenance items are not considered renovations but repairs (filter replacements, sprinkler maintenance, etc.).

Each request will be reviewed for conformance with the State of Alabama Building Code, applicable Federal, State, and local regulations. Capital Planning & Facilities will assist the requesting department in the request process by providing estimates and technical advice on the feasibility of the project.

- **Learning Space Redesign** – The classroom renovation distributions were temporarily placed on hold in 2023-2024 to facilitate the completion of several previously funded projects. During this period, the GUF funding for classroom modernizations continued to be allocated and earmarked for future improvements.

Renovation Request Review Process: Each Division is requested to provide the following to their Cabinet Member:

1. [Form 29](#) – Due **December 2, 2024**
2. Renovation supporting documentation

** Several departments have submitted their forms, but an additional request is being made to ensure evaluation of all projects.*

O&M Requests



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FY 2025-26 Budget Development

Departmental Budget Request

• Summarize your budget request at the FOAP Level. Use the *Budget Status Query by Account Report* to populate your current budget information (See the next slide).

• Forward the Excel document (NOT pdf) to your immediate supervisor along with all request justification documentation (old Form A).

• Your Supervisor will review the form and forward to their Vice President for approval.

• Approved requests will be forwarded to the Budget Committee for consolidation and Cabinet review via the Consolidated Budget Request Form (previously Form D).

Jacksonville State University Departmental Budget Request								
Department: Budget Manager								
Fund	Org	Account	Account Title	Program	2024 - 2025 (FY 25) Budget	Adjustment Requests	1-Time Requests	Proposed Budget
		71010	Travel Employee			N/A	N/A	0.00
		72010	Office Supplies			N/A	N/A	0.00
		72011	Instructional Supplies			N/A	N/A	0.00
		72018	Software			N/A	N/A	0.00
		72020	Clothing			N/A	N/A	0.00
		72106	Maintenance Contracts			N/A	N/A	0.00
		72201	Postage			N/A	N/A	0.00
		72402	Subscriptions & Periodicals			N/A	N/A	0.00
		72501	Advertising & Promotions			N/A	N/A	0.00
		72503	Printing			N/A	N/A	0.00
		72702	Training			N/A	N/A	0.00
		72703	Contractual Services			N/A	N/A	0.00
		76005	Books			N/A	N/A	0.00
		76008	Noncapitalized Equipment			N/A	N/A	0.00
		76009	Furniture			N/A	N/A	0.00
		72103	Maintenance & Repairs Equipment			N/A	N/A	0.00
			Accreditation			N/A	N/A	0.00
			Add Other Here			N/A	N/A	0.00
			Add Other Here			N/A	N/A	0.00
			Total		0.00	0.00	0.00	0.00
			Prior FY24 Budget:		0.00			
			Total FY25 Additional Requests		0.00			
			Proposed FY25 Budget		0.00			
			Total Funded Adjustment:					
						Important: Please submit Request Justification Form for each separate augmentation or one-time request.		

Populating Departmental Budget Request Budget Information

Use this report to generate a report to complete the Departmental Budget Request (old Form B) current year budget information.

Search Query

Create New Query

Select Query Type
Budget Quick Query

Values


Enter the respective Fund, Organization, and Account - 7% (Operating Expenses)

Chart *	Index
Jacksonville State University	Choose Index
Fund	Organization *
10000 Current Unrestricted	60001 VP Finance and Administration
Account	Program
7%	Choose Program

Create New Query


Fiscal Year *	2021	Fiscal Period *	14
Comparison Fiscal Year	2022	Comparison Fiscal Period	14


Banner Finance Self Service





FINANCE SELF SERVICE

- Finance Query
- Journals
- Requisitions
- Budget Development
- View and Approve Documents

 **My Finance Query**
Create, view and share budget availability, encumbrance and payroll queries.

 **My Journals**
Create and view draft, pending and completed journals and supporting documentation.

 **Approve Documents**
View list of documents pending approval. Approve, disapprove, or deny.

 **Delete Finance Template**
Delete templates for Finance Queries, Budget Development, and Purchase Orders.

Populating Departmental Budget Request Budget Information

Download the information to complete the Department Budget Request Form (old Form B) current year budget information.

My Finance • My Finance Query • Budget Status by Account

Budget Status by Account New Query

VP Finance and Administration - 60001

Query Results

Account	Account Title	Health	FY22/PD14 Adjusted Budget	FY22/PD14 Year to Date	FY22/PD14 Commitments	FY22/PD14 Available Balance
70000	Operating Expenditure Budget Pool	●	\$452,837.13	\$0.00	\$0.00	\$452,837.13
71010	Travel Employee	▲	\$0.00	\$1,040.83	\$0.00	(\$1,040.83)
71020	Travel Employee Recruitment	▲	\$0.00	\$926.84	\$0.00	(\$926.84)
71050	Non-employee Travel	▲	\$0.00	\$219.78	\$0.00	(\$219.78)
72010	Office Supplies	▲	\$0.00	\$1,605.27	\$0.00	(\$1,605.27)
72018	Software	▲	\$0.00	\$1,900.00	\$0.00	(\$1,900.00)
72022	Departmental Supplies	▲	\$0.00	(\$1,425.00)	\$0.00	\$1,425.00
72101	Maintenance and Repairs Buildings	▲	\$0.00	\$10,255.00	\$0.00	(\$10,255.00)
72102	Maintenance and Repairs Automotive	▲	\$0.00	\$260.00	\$0.00	(\$260.00)
72106	Maintenance Contracts	▲	\$0.00	\$1,130.14	\$0.00	(\$1,130.14)
72201	Postage	▲	\$0.00	\$63.90	\$0.00	(\$63.90)
72501	Advertising and Promotions	▲	\$0.00	\$519.13	\$0.00	(\$519.13)
Report Total (of all records)			\$480,306.18	\$432,452.55	\$13,813.82	\$13,939.81

Helpful Hint: Conduct a Variance Analysis to identify the gap between the planned outcome (The Budgeted) and the actual outcome (Actuals).

FOAP Departmental Budget Analysis Tool

☰ Saved Dashboard Settings ▾
📄 JFL0320 - Operating Expense Five... ▾
⏸ Run



JFL0320 - Operating Budget/Expense Four-Year Analysis

JACKSONVILLE STATE UNIVERSITY

Connection: ODSPROD

Begin with Fiscal Year: ▾

 Org: ▾

 Fund: 10000

Acct	Acct_Desc	Prog	Budgt_1	Exp_1	Budgt_2	Exp_2	Budgt_3	Exp_3	Budgt_4	Exp_4
70000	Operating Expenditure B...	30	0	0	195000	0	120000	0	120000	0
70000	Operating Expenditure B...	70	-3500	0	277837....	0	261640....	0	439435....	0
71010	Travel Employee	70	1040.83	2532.02	0	1040.83	0	3455.18	0	30158.35
71020	Travel Employee Recruit...	70	926.84	0	0	926.84	0	1095.82	0	-109.89
71050	Non-employee Travel	70	219.78	0	0	219.78	0	0	0	0
72010	Office Supplies	70	1951.15	1844.08	0	1951.15	0	2985.57	0	3913.07
72012	Expendable Supplies	70	0	0	0	0	0	387.99	0	289.99
72018	Software	70	1900	2058	0	1900	0	0	0	100
72019	COVID-19	70	0	0	0	0	0	0	0	23.5
72020	Clothing	70	0	0	0	0	0	64.98	0	0
72021	Fixtures and Other Items	70	0	0	0	0	0	249.99	0	0
72022	Departmental Supplies	70	1000	0	0	-1425	0	1425	0	0
72101	Maintenance and Repair...	70	10255	0	0	10255	0	0	0	136.92
72102	Maintenance and Repair...	70	260	0	0	260	0	263	0	0
72103	Maintenance and Repair...	70	0	0	0	0	0	0	0	0
72106	Maintenance Contracts	70	1130.14	1243.15	0	1130.14	0	1290.8	0	934
72201	Postage	70	76.23	110.28	0	76.23	0	633.49	0	381.71
72302	Facilities Rental	70	0	0	0	0	0	0	0	1060
72401	Memberships	70	0	14352	0	0	0	7062	0	6200.5

40 items



Download to a CSV file for additional analysis.



FY 2025-26 Budget Development

**Jacksonville State University
Unit Budget Change Request**

Instructions:
 Please provide one form per request
 Copy sheet for each request as needed
 Only report O&M requests on this form
 Forward this document to your immediate supervisor along with a copy of your Operational Plan

Unit Name	
Unit Leader	
Immediate Supervisor	
Vice President	
Budget Request Year	

Requested Funds Frequency
 One Time
 Reoccurring

Requested Funds Will Support
 Unit Objective
 Strategic Plan
 Other (explain)

FOAP

Fund	Org	Account	Program
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

Amount Requested

Justification and Alignment with Strategic

Action Taken by Vice President
 Approved and Forwarded to Budget Committee
 Not Approved at this Time

Action Taken by Budget Committee
 Approved and Forwarded to President's Cabinet
 Not Approved at this Time

Unit Budget Change Request (previously FORM A)

- Please complete a form for each budget augmentation or one-time O&M requests (i.e. 70000s). Position & Capital Budget Requests have a new process (TBA).
- Complete narrative sections and select the respective check box.
- Forward the Excel file to your immediate supervisor along with a copy of your Annual Unit Operational Plan.
- Your Supervisor will review the form and forward to their Dean/Vice President for approval.
- Approved requests will be forwarded to the Budget Committee for consolidation and Cabinet review.
 - **All Forms: Due from Supervisor/Dean to Cabinet– January 7, 2025**
 - **All Forms: Due from Cabinet – January 13, 2025**
 - **Send Cabinet approved forms to Budget Committee – February 3, 2025 (Finance only)**

FY 2025-26 Budget Development

Jacksonville State University Revenue Request Summary Form C												
<small>(attach original request and supporting documentation to this summary and submit to Chair of the Revenue Subcommittee)</small>												
Academic Year 2022-2023												
Division:												
College:												
	Amount	Unit	Primary Contact	FUND	ORG	ACCOUNT	PROGRAM	Title of Request	Justification for Request	Type Code	Frequency	Priority
Tuition												
Fee												
Other												
Total	0.00											

Revenue Request Summary FORM C – ONLY Vice President Complete

Cabinet Members will attach original request for approved requests and supporting documentation to this summary and submit to Chair of the Revenue Subcommittee (Jessica Wiggins).

FY 2025-26 Budget Development

Jacksonville State University												
Expense Request Summary Form D												
(attach original request and supporting documentation to this summary and submit to Chair of the Expense Subcommittee)												
Academic Year 2022-2023												
Division:												
College:												
Amount	Unit	Primary Contact	FUND	ORG	ACCOUNT	PROGRAM	Title of Request	Justification for Request	Type Code	Frequency	Priority	
O&M												
Personnel												
Other												
Total	0.00											

Expense Request Summary FORM D ONLY Vice President Complete

Cabinet Members will attach original request for approved requests and supporting documentation to this summary and submit to Chair of the Expense Subcommittee (Josh Robinson).

FY 2025-26 Budget Expenditure Rubric

Request will be evaluated based on the expenditure rubric.



Expenditure Sub-Committee Proposal Evaluation Rubric

	Criteria	None (0)	Low (1)	Moderate (2)	Strong (3)	Score
Unit Plan	Proposal is connected to the unit's operational/assessment plans.	Does not address	Request includes some information, but the connection to the unit's plan is not clearly defined.	Request includes moderate information about the connection to the unit's plan.	Request includes significant information about the connection to the unit's plan.	
	Proposal is connected to the unit's program review.	Does not address	Request includes some information, but the connection to the unit's program review is not clearly defined.	Request includes moderate information about the connection to the unit's program review.	Request includes significant information about the connection to the unit's program review.	
	There is a defined plan to assess the success of the proposal	Does not address	Request includes some information, but there is limited information about how the request will be assessed.	Request includes moderate information about the assessment plan for the proposal.	Request includes significant information about the assessment plan for the proposal.	
Strategic Plan	Proposal is connected to JSU's strategic plan.	Does not address	Request includes some information, but the connection to the strategic plan is not clearly defined.	Request includes moderate information about the connection to the strategic plan.	Request includes significant information about the connection to the strategic plan.	
	Proposal defines how initiative will add value to the strategic plan.	Does not address	Request includes some information, but the value add is not clearly articulated.	Request includes moderate information about the value add to the strategic plan.	Request includes significant information about the value add to the strategic plan.	
Alignment with Mission	Proposal is aligned with the mission of JSU.	Does not address	Request includes some information, but the connection to the JSU mission is not clearly defined.	Request includes moderate information about the connection to the JSU mission.	Request includes significant information about the connection to the JSU mission.	
	Will the proposal positively impact the mission of JSU?	Does not address	Request includes some information, but the impact on the JSU mission is not clearly defined.	Request includes moderate information about the impact on the JSU mission is not clearly defined.	Request includes significant information about the impact on the JSU mission is not clearly defined.	
Alignment with a Master Plan (Optional)	Does the proposal align with a master plan? (Campus master plan, housing master plan, etc.)	Does not address	Request includes some information, but the connection to a master plan is not clearly defined.	Request includes moderate information about the connection to a master plan.	Request includes significant information about the connection to a master plan.	
Life & Safety (Optional)	Does this request address a life and safety concern for the University?	Does not address	Request somewhat addresses a life and safety concern.	Request moderately addresses a life and safety concern.	Request significantly addresses a life and safety concern.	

Average Score: _____

Position Planning & Salary Request



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FY 2025-26 Position Budget Development

Position management is an important process throughout the institution. Personnel costs currently represent at least 90% of JSU's annual budget. Evaluating staffing needs is a key factor in ensuring that resources are being utilized in a manner that maximizes the quality and quantity of services provided to our diverse student population.

Also, the community we serve, and our programs are constantly evolving, thus staffing needs must be reevaluated periodically to be aligned with the needs of the community served. Additionally, given limited resources, position needs must be prioritized to ensure that positions are filled based on the level of importance and in the context of honoring JSU's mission.

As a result, JSU's position prioritization process should provide a formal, transparent method to:

- Prioritize vacant positions to ensure that positions are filled based on the level of need
- Identify and prioritize new positions
- Evaluate changes in positions resulting from workload shifts (increased/decreased responsibilities, other added/eliminated positions)



FY 2025-26 Position Budget Development

Personnel Action Change and Position Justification Requests forms are required for documenting any change requests and justification to be reviewed by the President and Cabinet. All requests are routed electronically through the appropriate chain of command to the Department of Human Resources. The HR Representative will add the request to the agenda for PAC review. The approvals/denials are then communicated to the Division Vice President/Provost and to the request originator/form initiator.

Department Reorganization

*The effective date for ALL department reorganizations are October 1st of each fiscal year. **Changes cannot be made after the start of a new fiscal year.***

SPLIT: identify a single existing department and split it into one or more separate departments.

MERGE: identify multiple existing departments that will be combined into 1 single department.

Re-Organize: move a department between divisions or to another department within the same division

Personnel Action Request Form (ePARE):

- Promotion
- Title Changes (no reclassification or change of duties)
- Department Transfer (employee and position)
- Pay Adjustments
- Interim Appointment and/or stipend
- Department Requests
 - Department Name Change
 - Request for New Department

Position Justification Request Form (ePJRF):

- Reclassification of existing position
- Request for a new position / FTE
- Request for recruitment

All Personnel and Position Change Request Meetings are monthly, with dates to be determined.

<https://www.jsu.edu/hr/management-and-administration/personnel-actions.html>



FY 2025-26 Position Budget Development

General Funded Position Process

The review process begins with the identification of classified and management positions by JSU departments (Argo's Position Budget Reports). Next, the positions are prioritized. The position prioritization work results in three prioritized lists, one for management, faculty, and classified positions. The purpose of the priority lists is to determine which positions to fill first based on available resources. The position prioritization process will be performed during Personnel Action Committee meetings.

The weighting mechanism used to rank positions is the following:

- Based on department/institutional level needs:
 1. How do the duties and responsibilities of the position fulfill the following:
 - New or existing department/program needs
 - Needs of the department, identified through program and operation planning or , if applicable
 - JSU's Strategic plan
 2. Will this position contribute to meeting increased demand or growth?
 3. Can job duties be shared amongst current staff?
 4. Can the requested position be postponed?
 5. Will this reduce the need for hourly employees and offset the cost of hiring a permanent employee?
 6. Can process improvements or technology eliminate the need for this position?

Restricted Funded Position Process

As grant appropriations and restricted programs needs and funding sources are unique to each program, management and classified positions requested are determined through a separate process from the general fund process.

Restricted program funded management and classified position needs as determined by the Program Manager in consultation with the Vice President overseeing the program. The Vice President and Program Manager will work with Grant Accounting in the Controller's Office to identify an appropriate funding source and determine sustainability. Upon determination that the position can be sustained through the restricted funding source, the Vice President will submit the position request to Human Resources for discussion and as a recommendation to the President.

To ensure transparency, positions filled through this process will be reported as an informational item at the Budget Committee meetings.

FY 2025-26 Position Budget Development

- **Position Control** - Position control is JSU's process for tracking and maintaining personnel actions and budgets for State funds so that personnel budgets are monitored, and units do not overspend. It also ensures there are sufficient funds to cover employee salaries.

Open Banner Self-Service > [Click My Finance Query](#) > [Click New Query](#) >

Create New Query ✕

Select Query Type

Payroll Expense Detail ^

🔍

Budget Status by Account

Budget Status by Organizational Hierarchy

Payroll Expense Detail

Encumbrance Query

Multi Year Query

Budget Quick Query

Index

Choose Index v

Organization *

32002 Arts & Humanities Program ... x v

Grant *

Choose Grant v

Account

% x v

Program

% x v

Activity

Choose Activity v

Fiscal Year *

2023 x v

Fiscal Period *

14 x v

SUBMIT

➤ Payroll Expense Detail – gives the detail of personnel paid from the salary accounts of the budget. This will always be cumulative from the beginning of the fiscal year (October 1st).

My.Finance > My.Finance.Query > Payroll Expense Detail

Payroll Expense Detail
New Query

◀ Dean School of A&H - 32001 ✎ ➤ 📄 ⓘ

Query Results ↓

Account	Account Title	Employee	Last Name	Position	Suffix	Transaction Date	Finance Document	Rule Class
61020	Salaries	001132577	Smith	020326	00	10/09/2022	F0098315	HGNL
61020	Salaries	001132577	Smith	020326	00	10/09/2022	F0098315	HGNL
65005	FICA Match	001132577	Smith	020326	00	10/09/2022	F0098315	HGRB
65005	FICA Match	001132577	Smith	020326	00	10/09/2022	F0098315	HGRB
65005	FICA Match	001132577	Smith	020326	00	10/09/2022	F0098315	HGRB
65005	FICA Match	001132577	Smith	020326	00	10/09/2022	F0098315	HGRB
65010	TRS Match	001132577	Smith	020326	00	10/09/2022	F0098315	HGRB
65010	TRS Match	001132577	Smith	020326	00	10/09/2022	F0098315	HGRB
Report Total (of all records)								

FY 2025-26 Position Budget Development

Root > Production > Budget Manager





Ar evisions Argos

Enter Search String...

Explorer Shortcuts Recent

Parent Folder

Name ^

- ★  Active Employee Listing (Budget Manager)
- ★  Position Budget Report
- ★  Position Budget Report - Mismatched FOAPs between NBAJOBS and NBAPBUD
- ★  Working Position Budget with Current Incumbent

Saved Dashboard Settings Reports Run

JSU Position Budget Report Data Source: ODSPROD_Dashboard

Current Fiscal Year: **2023** Orgn: -- All Organizations --

ORGN	ORGN DESC	POSITION	POSN TITLE	BUDGET SALARY	EMPL SALARY	ID	NAME	EMPLOYEE_CLA	ORIG DT OF HIRE	LD FUND	LD
------	-----------	----------	------------	---------------	-------------	----	------	--------------	-----------------	---------	----

FY 2025-26 Position Budget Development



Jacksonville State University
 Department of Human Resources
 700 Pelham Rd N., 326A Angle Hall, Jacksonville, AL 36265
 Phone: (256) 782-5007
www.jsu.edu/hr

Position Replacement Request Form

This form is for replacement positions that are at the current budgeted salary or below. The following requests must be approved by the Personnel Action Committee and submitted on the Personnel Action Committee Request Form for approval at the monthly meeting.

- New positions
- Reclassification of a current position (including)
 - Non-exempt to exempt status
 - Title change
- Salary/budget increases to current position (including pay changes)
- Promotions of current employees

REPLACEMENT POSITION INFORMATION:

Department: * Division: *

Position Type: * -- Please Select -- Position Class: * -- Please Select --

Position / Line Number: *

Position Title: *

Replacement Position Title (if changing):
 (Ex: Associate Professor/ Assistant Professor)

Employee Being Replaced: * Position Reports To: (Supervisor's Name) *

Reason For Vacancy: * Date The Position Was Vacated: *

POSITION BUDGET INFORMATION:

Current budgeted salary: *

Proposed salary: *

Salary range (if applicable for recruiting):

FOAP

Fund	Organization	Account	Program
* <input type="text"/>	* <input type="text"/>	* <input type="text"/>	* <input type="text"/>

RECRUITMENT INFORMATION:

Has the position description been reviewed and revised (if necessary)? * -- Please Select --

- Edits can be made and submitted via PageUP

Updated Position Description (if necessary): Attach File

- Not applicable if updated via PageUP

Types of Recruitment

EXISTING POSITION ADJUSTMENT REQUEST FORM

- Use the [Personnel Action Request Form](#) (e-PARF)
- Requested Effective Date of Change: **on or after August 15, 2025**
- Justification: Use ORIE's Dashboards enrollment, performance evaluations, operational plans, and data qualitative information to support your requests.

JSU funds annual cost of living (COLA) salary increases that are approved by the Board of Trustees every October. A request form is required for any other additional compensation payments to a current employees for the upcoming fiscal year.

Additions to headcount, salary increases, promotions (non-academic), and position replacements which require additional funding outside of the approved fiscal year budget may need to be funded by salary savings. Salary savings from an existing position being used to permanently fund personnel requests will result in a permanent decrease in that position's budget. The final mount of salary savings available for use is determined and approved by the Office of the Provost and by the Office of Finance & Administration.

- Submit the ***Personnel Action Request Form*** for final VP approval to HR on **January 7, 2025.**



FY 2025-26 Position Budget Development



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Personnel Action Committee Request Form

The following form is used for personnel actions that require approval from the Personnel Action Committee (PAC). Once Human Resources receives the form, it will be added to the next PAC meeting agenda.

Replacement positions can be requested with the Position Replacement Request Form.

Please select the appropriate request type below:

1. Personnel Action Change Request
 - o Promotion
 - o Title Change
 - o Transfer
 - o Pay Change
2. Department/Office Change Request
 - o Department Transfer
 - o Department Name Change
 - o New Department (Enter TBD for Dept/ORG #)
3. Interim Appointment and/or Supplemental Pay Request
4. New Position Request

- * Personnel Action Change Request
 Department/Office Change Request
 Interim Appointment and/or Supplemental Pay Request
 New Position Request

Please select if this submission is an original, or revision: Submission Date:

NEW POSITION INFORMATION:

Department: Division:
 Position Title: Requested Salary:
 Position Type: Position Class:
 Position Reports To:
 (Supervisor's Position title)

New Position FOAP

Fund Org Account Program

RECRUITMENT INFORMATION:

Has the position description been created and approved?

- Position descriptions can be created and submitted via PageUP

New Position Description:

- Not applicable if uploaded via PageUP for approval

Types of Recruitment

- External (Available to anyone)
- Internal (Available to JSU employees only)

Requested Recruitment Type:

Recruitment Lengths Examples

- 5 days (minimum)
- 30 days (required for faculty recruitment)
- Open until sufficient candidate pool
- Other (please specify)

Requested Recruitment Length:

NEW POSITION OR VACANT RECRUITMENT REQUESTS

- Submit a [Position Justification Request Form](#) (PJRF)
- Anticipated Start Date: on or after August 1, 2025 or October 1, 2025 (non-academic)
- Justification: Use ORIE's Dashboards enrollment data and qualitative information to support your requests.
- Attach the New Program/Initiative Request Form – See JSU's Department Head Resources Page (add link form Kim Presson)
- Submit the **Position Justification Request Form** for final VP approval to HR on **January 7, 2025.**



Program & Course Fee Review and Request



the FRIENDLIEST CAMPUS *in the* SOUTH

Program & Course Fees Allowable Expenses

[Policy IV.13 Course and Program Fee Policy](#)

Program Fees – Graduate Assistant Labor Policy update in process

One (1) GAA per college can be funded through the Program Fees at the discretion of the Dean and Provost. The GAA must work to support a direct instructional program or to enhance the student learning experience. This GAAs is not permitted to serve as administrative office staff. Program fees can be used to pay department accreditation expenses.

Course Fees - Reminder

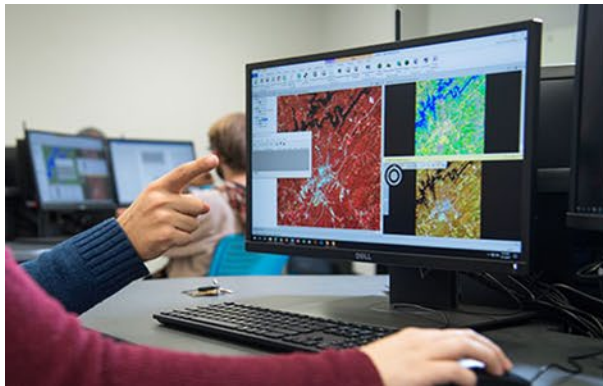
Course instructional materials are all materials that are designed for use by pupils and their teachers as a learning resource and help pupils to acquire facts, skills, or opinions or to develop cognitive processes. Technology-based materials include, but are not limited to, software programs, lesson plans, and databases. Each program has BOT approved allowable usages (ex. site licenses, maintenance of accreditation requirements, student travel, etc).

Course fees can not be used for salaries and wages for a JSU instructor, support staff, or administrative staff (includes Graduate Assistants).

FY 2025-26 Budget Development

Program & Course Fees - Part 1 (Revenue Budget)

- Departments review current Program and [Course Fees](#)
- Dean's will review prior year revenue – Run a Banner Self Service Query (must check include revenue accounts – see below)
- Discuss the new or modified proposed fees with the Provost via the Dean
- Submit the FORM 102: Program and Course Fee Request Form (if preliminary Provost approval received)



Departmental Budget Request Budget Information

Note: Use must check include revenue accounts

Search Query

Create New Query

Open Banner Self-Service > **Click My Finance Query** > **Click New Query** > *Budget Status by Account* Query

Select Query Type

Budget Quick Query

Values

Enter the respective Fund, Organization, and Account - 7% (Operating Expenses)

Chart*

Jacksonville State University

Fund

10000 Current Unrestricted

Account

7%

Index

Choose Index

Organization*

60001 VP Finance and Administration

Program

Choose Program

Create New Query

Scroll down and enter the fiscal year and fiscal period of 14 > Click SUBMIT

Fiscal Year*

2021

Fiscal Period*

14


Comparison Fiscal Year

2022

Comparison Fiscal Period


14

Banner Finance Self Service




FINANCE SELF SERVICE

- Finance Query
- Journals
- Requisitions
- Budget Development
- View and Approve Documents




My Finance Query

Create, view and share budget availability, encumbrance and payroll queries.




My Journals

Create and view draft, pending and completed journals and supporting documentation.



Approve Documents

View list of documents pending approval. Approve, disapprove, or deny.



Delete Finance Template

Delete templates for Finance Queries, Budget Development, and Purchase Orders.

Program & Course Fees Budgeting

Respective FOAP information is below. The budget is adjusted in the Dean's Budget (FOAP) to reflect the actual receipts a month after the semester start.

Program Fees

Fund	Org	Account	Prg.	Description
10003	32002	70000	40	Art/Humanities
10003	35050	70000	40	Education
10003	36002	70000	40	Business
10003	37003	70000	40	Prof Nursing
10003	37003	70000	40	Prof Nursing
10003	37006	70000	10	Prof Nurs BSN-DNP
10003	37006	70000	10	Simulation Fee
10003	37007	70000	10	Prof RT Fee
10003	41004	70000	50	International House

Program Revenue Account: 51290

Course Fees

Fund	Org	Account	Prg.	Description
10004	32002	70000	40	Art/Humanities
10004	34002	70000	40	Science
10004	35050	70000	40	Education
10004	37010	70000	40	Health/wellness
10004	38002	70000	40	Human/Socia
10004	33001	70000	10	Learning Services
10004	32105	70000	10	Honors Program

Course Revenue Account: 51291

FY 2025-26 Budget Development

FORM 102: Course Fee Request Form

FORM 102: COURSE FEE REQUEST FORM

Academic Unit _____

Course No. and Title _____

___ First Time Request	___ Proposed Fee
------------------------	------------------

___ Request for Change	___ Current Fee	___ Proposed Fee
------------------------	-----------------	------------------

Supporting Rationale: Give rationale on a **separate page**. Include detailed projections of income (average number of students x cost per student) and course costs (details of costs to be covered by these fees)

Department Head Recommendation:

___ Recommended ___ Not Recommended

Signature of Department Head Date

Dean's Recommendation:

___ Recommended ___ Not Recommended

Signature of Dean Date

Tuition and Fees Evaluation Committee Recommendation:

___ Recommended ___ Not Recommended

Provost Approval:

___ Recommended ___ Not Recommended

Signature of Provost Date

Vice President, Finance & Administration Approval:

___ Recommended ___ Not Recommended

Signature of Sr Vice President for Finance & Administration (SrVPPFA) Date

02/16/22 FORM 102

- Detail your program & course fee request on [Form 102](#)
- Forward the form to the Provost.
- Approved requests will be forwarded to the Budget Committee for consolidation and Cabinet review. **January 20, 2025**
- Submit the Project Budget Line Item Request to the [FY24 Budget Development Dropbox](#) (percentages can be used in lieu of amounts) by **January 20, 2025**
Project Budget Line-Item Request

College Name	Prepared by		Ext.					
Division Name	Department/Office							
Funding Source	Art Course Fees		Reviewed/Approved by					
Funding Period			Date					
			1/28/2024					
	Preliminary	<input type="checkbox"/>	Revised	<input type="checkbox"/>				
PROJECT BUDGET REQUEST								
	Description	Account Information						Budget
		Fund	Orgn	Acct	Prog	Actv	Loc	
1	Travel Student Groups	10004	32002	71040	40			1,614.08
2	Instructional Supplies	10004	32002	72011	40			100,764.50
3	Maintenance Electrical	10004	32002	72109	40			100.00
4	Printing	10004	32002	72503	40			831.60
5								
6								
7								
TOTAL EXPENSES		\$ 103,310.18						
		Fund	Orgn	Acct	Prog	Actv	Loc	Budget
TOTAL REVENUE		\$ 103,310.18		10004	32002	51291	40	225,425.28
NET TOTAL								\$0.00
Page Number	Jacksonville State University							
Date:			Approved By:					

College Name		Prepared by		Ext.	
Divison Name		Department/Office			
Funding Source	Art Course Fees	Reviewed/Approved by			
Funding Period		Date	1/28/2024		

Preliminary

Revised

PROJECT BUDGET REQUEST

	Description	Account Information							Budget
		Fund	Orgn	Acct	Prog	Actv	Loc	%	
1	Travel Student Groups	10004	32002	71040	40				1,614.08
2	Instructional Supplies	10004	32002	72011	40				100,764.50
3	Maintenance Electrical	10004	32002	72109	40				100.00
4	Printing	10004	32002	72503	40				831.60
5									
6		SAMPLE							
7									

TOTAL EXPENSES

\$ 103,310.18

	Fund	Orgn	Acct	Prog	Actv	Loc	
TOTAL REVENUE	10004	32002	51291	40			225,425.28

NET TOTAL

\$0.00

Page Number

Jacksonville State University

Date:

Approved By:





Discussion