



Office of Planning, Budget & Analysis

MEMORANDUM

TO: Robert G. Frank, President
Chaouki T. Abdallah, Provost/EVP for Academic Affairs
David W. Harris, EVP for Administration, COO and CFO
Henry Nemcik, President & CEO, UNM Foundation, Inc.
Gabriel Lopez, VP for Research & Economic Development
Dorothy Anderson, VP for Human Resources
Paul Krebs, VP for Athletics
Elizabeth Metzger, University Controller
Eliseo Torres, VP for Student Affairs

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

DATE: June 30, 2016

RE: Main and Branch Campus Fiscal Year 2017 UAP 7000 Policy Review

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

The Categorization of Reserves (CAR) system in Banner Self-Service allows departments and colleges to categorize their reserves as committed, dedicated, or discretionary. Branches, Colleges and Departments are required to use this system. The system will open on August 1, 2016.

Please forward this information to your AVPs, Deans, and Directors so they can communicate the essence of the UAP 7000 policy to their respective Chairs, Directors, Managers, and Faculty. Any questions or concerns can be communicated directly to OPBA. 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 UAP 7000 procedures, the CAR 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
Natalia Koup, Financial Analyst, Budget Operations, OPBA
Nicole Dopson, Financial Officer, Provost's Office
Kevin Stevenson, Strategic Planner, President's Office
Barbara West, Exec. Research Operations Officer, VP Research & Economic Development
Rodney Harder, CFO, UNM Foundation, Inc.
Kimmerly Kloepfel, Fiscal and Planning Officer, VP Student Affairs