Instructional Reserve Process

Scope/Purpose
The purpose of the Instruction Reserve process document is to establish a standardized process intended to control faculty positions and salary funding for the budget.

Overview
Beginning FY20, the Provost Office has provided a new process for maintaining control over faculty positions (salary funding) that are expected to become vacant or will be vacant at the end of the fiscal year. The vacant position and all attributes and E&G funding will be moved from the appropriate academic department cost centers to the Instructional Reserve (IR) cost center 200368 owned by the Provost. This will be done through the PBCS process or in September each year. Then, each September, 50% of the returned IR funding will be transferred to the appropriate College IR cost center and may be used on a temporary basis for adjuncts and temporary expenses until a T/TT faculty member is hired in that College.

- The faculty positions involved in this process are budgeted positions only.
- The funding is Educational and General (E&G) funds only, including the 37XXXX CC.
- This process does not apply to faculty positions funded by other sources.

Notification of Approved Faculty Hires
Each year, the Provost will provide the colleges with a letter stating their approved hiring requests with details on the funding source for each hire. In most cases, the new T/TT faculty positions will be supported first by the 50% salary funds remaining in the college and then either by the Provost from IR or from Growth funds within the college/department.

Reporting Faculty Terminations
Departments/colleges will communicate with the Academic Resource Planning department (Holly Niemann) known faculty terminations whose salaries are supported by cost centers subject to instructional reserve funds. Academic Resource Planning (Holly Niemann) will maintain a spreadsheet of all notifications. The spreadsheet will be sent to the Budget Office (Adriana Martin) at the end of the PBCS Budget working time. Holly will be responsible for managing the A1000 and A2000 budget account lines in the IR cost center 200368 and also transferring positions to IR within PBCS.

The Budget Office will update the state appropriated funds between the academic cost center and the IR cost center.

Annual Budget Process - Vacant Faculty Positions
During the annual budget process and throughout the year, vacant faculty positions are communicated by the colleges directly to the Provost’s Office (Julie Shaw) and the Academic Resource Planning Office (Holly Niemann).

For T/TT faculty member who leave sometime on or before August 31.
• During the PBCS budget process for those T/TT faculty who we know are leaving by August 31, and have a resignation or retirement letter in hand, Holly Niemann will transfer the positions from the academic departments to the IR cost center in the Provost Office using PBCS. In addition, 100% of the IR funds in the departments (from both the regular E&G cost centers and the research E&G cost centers) will be returned to the Provost’s IR cost center. This will be done by Holly Niemann working with Adriana Martin in the Budget Office to adjust the state appropriation dollars in the cost centers affected. Actions taken by the Budget Office will be done from the communication received from Holly through spreadsheet. Adriana will reduce the departments E&G cost center appropriation and the E&G research cost center appropriation amount and will increase the Provost IR appropriation amount in PBCS. The budget loaded into UT Share will reflect these changes.

• For those T/TT faculty who, after the PBCS budget process is over, we find out are leaving by August 31, 100% of the IR funds in the departments (from both the regular E&G cost centers and the research E&G cost centers) are returned to the Provost’s IR cost center. This is done by the ARP Office in September as a permanent budget transfer effective September 1. Holly will work directly with Adriana as she (Holly) submits these budgets transfers in UT Share that will be processed after 9/1. Adriana is the Budget Office resource contact for this project.

• In September each year, the ARP Office, as a permanent transfer effective September 1, will return 50% of the IR funds from the Provost’s IR cost center to the Dean’s IR cost center. Those IR funds will remain with the Dean for temporary usage until the Provost determines that the funds will be used to cover the cost of a new T/TT faculty member in that college.

• In order to maintain the research commitment in each college, colleges need to make sure that their departments are assigning 40% (or whatever is applicable) of T/TT research active faculty workload to the E&G research cost center. The 40% (or whatever is applicable) funding must come from E&G. In order to do this, a budget transfer will need to be processed by the department to move funds from the appropriate E&G cost center to their research cost center at the time the position funding form is completed.

Annual Budget Process – New T/TT Positions Filled:

During the annual budget process, newly hired positions for which Holly Niemann has received from the department/college a signed offer letter, are added in PBCS by each academic department using the “New Positions“ form.

For T/TT faculty members who are hired on or after September 1

• Provost will determine funding source(s) of new hires.

• For those who will be paid from Provost IR and/or College IR funds, and who were not included in the PBCS process, if the new T/TT faculty is beginning September 1, then in September the
ARP Office and College Dean’s Office will transfer the funds to the department’s regular E&G cost centers and the new research E&G cost centers as permanent transfers in the amounts determined by the Provost.

- For those who will be paid from Provost IR and/or College IR funds, if the new T/TT faculty is beginning after September 1, the ARP Office and College Dean’s Office will transfer the prorated funds to the department’s regular E&G cost centers and the new research E&G cost centers as temporary transfers at the prorated amounts determined by the Provost. Then the total funds will be transferred on a permanent basis for the following year during the PBCS budget process in the spring.

**Annual IR Tracking Spreadsheet**

At the end of the annual operating budget cycle, a copy of the excel spreadsheet will be saved to PBCS for historical reference.

**eForms**

All changes related to this process require the completion of eForms in UTShare. The changes processed in PBCS do not change the position data in UTShare.

**Staff**

Currently the staff involved in this process are Adriana Martin, Budgets, Planning & Analysis and Holly Niemann, Academic Resource Planning.

**Questions**

All questions are to be directed to the Academic Resource Planning department (Holly Niemann). Budget Resources will not be responding to questions about this process.