



Budget Broadcast

with the

University Budget Office

November 2024

Agenda



- Budget Transformation Update
- Legislative and Executive Branch Update
- HEF Balances and Future Factors
- Unaudited Fiscal Year 2024 Results
- Facilities-Billing Updates FY25
- Power BI Reports, Updates and Training
- Announcements & Reminders

Budget Transformation Update

Budget Transformation Update

- Financial models generated by Technical Committee for review by Steering Committee
- Nov 18 decision on recommendation
 - Recommendation write up in process
 - Subject to Executive Committee acceptance/ rejection
- 5 informational Town Halls conducted; roughly 330 participants
- Consultant Input
- For FY26 budgeting:
 - 5 year template will be provided for input
 - If merit budgeted, will be at a unit level – not centrally
 - Budget Office to revise timeline & instructions due to new model

Legislative/ Executive Branch Update

Legislative Update – Formula Funding (1)

1. Recommended changes to expenditure study methodology

The 2026-27 Formula Advisory Committee recommended that the matrix weights be calculated compared to a base expenditure per SCH rate rather than compared to the cost of a Lower Level Liberal (LLLA) SCH. The methodology sets the base rate at the average expenditure per SCH for the LLLA from FY 2018-FY2022. By comparing expenditure levels for each program/level to a set base expenditure rate, the LLLA weight will be able to increase (or decrease) from 1.0 depending on the actual change in expenditures (unlike the previous methodology, that always maintain the rate at 1.0).

[Formula Funding Recommendations for the 2026-27 Biennium - April 2024](#)

[FY 2026-2027 GAI Initial Formula Funding Run 10.28.2024_Final.xlsx](#)

Legislative Update – Formula Funding (2)

2. Recommended changes to formula; the model includes:

- Certified semester credit hour data for the spring and summer of 2024 and error free data for the fall of 2024;
- Expenditure study weights run according to the recommended methodology;
- Three-year average at-risk degrees awarded at Comprehensive Regional Universities;
- Three-year average total research expenditures for the Texas Research University Fund;
- Three-year average federal and private research expenditures and three-year average research doctorates for the National Research Support Fund;
- Three-year average federal and private research expenditures for the Comprehensive Research Fund;
- Predicted square feet from the FY 2023 Space Model;
- Utility adjustment factors;
- Texas A&M University at Galveston shipboard operations inventory;
- Fall 2024 preliminary headcount;
- Veterinary medicine and law tuition data; and
- Disaggregated total semester credit hours between resident and nonresident students based on tuition status from Fall 2023 to Fall 2024 for LBB tuition estimating.

Legislative Update – HEF (1)



Table 1. History of HEF Review and Legislation

Legislative Session	Annual Appropriation	Action
69 th Legislative Session (1985)	\$100.0 million	Introduced
74 th Legislative Session (1995)	\$175.0 million	House Bill (HB) 2462 increased allocation and provided for a \$50 million annual
79 th Legislative Session (2005)	\$262.50 million (in 2008)	HB 3001 reallocated the formula and increased allocation starting in FY 2008
81 st Legislative Session (2009)	\$262.50 million	HB 51 reallocated the formula and eliminated the HEF Trust Fund
84 th Legislative Session (2015)	\$393.75 million (in 2017)	SB 1194 reallocated the formula and increased the allocation starting in FY 2017
86 th Legislative Session (2019)	\$393.75 million	SB 709 reallocated the formula starting in FY 2021
88 th Legislative Session (2023)	\$393.75 million	SB 1055 removed Stephen F. Austin State University from the HEF and reallocated funds among remaining eligible institutions

[Higher Education Fund Recommendations for Fiscal Years 2026-2035](#)

Legislative Update – HEF (2)

- Additionally, the group considered that if there are no changes to the HEF formula or amount, 20 of the 31 HEF institutions would lose funding compared to current levels. This is a result of certain institutions' increased enrollment driving increases in the metrics used for the allocations, coupled with declines seen at smaller, primarily rural institutions in the state, plus the addition of two new institutions of higher education becoming eligible for HEF appropriations, thereby splitting the funds across a larger base.

Stephen F. Austin State University moves to join the University of Texas System

Regents said they chose the UT System because of its access to the Permanent University Fund, which consists of oil and gas assets.

BY KATE MCGEE NOV. 29, 2022 UPDATED: 4 PM CENTRAL

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The campus of Stephen F. Austin University in Nacodoches on Oct. 3. © Mark Felix for The Texas Tribune

Executive Branch Update



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2024 Election Results

Republican Strength

Latino Voters

Dems Underperform

Texans and

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A dark blue banner for TSTC (Texas State Technical College). On the left is a photograph of a woman with her arms crossed. The text in the center reads '100% OUTCOMES-BASED FUNDING' in large white letters, with 'WE DON'T GET PAID UNLESS OUR GRADUATES DO.' in smaller white letters below it. On the right is the TSTC logo, which consists of a stylized white bird icon and the letters 'TSTC' in white. Below the logo is a small red button with the text 'Learn More' in white.

Gov. Greg Abbott wants to freeze tuition at Texas colleges and universities for another two years

The governor's directive extends a tuition freeze for Texas' public universities that was approved in the last legislative session.

BY KATE MCGEE NOV. 13, 2024 UPDATED: 16 HOURS AGO

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HEF Balances and Future Factors

Aug 31 v Nov 12, 2024 HEF Comparison



	Unassigned	w Purpose code	w Project code	Total
Aug 31, 2024 bal	19,543,549	19,309,107	41,765,060	80,617,716
Nov 12, 2024 bal	24,764,854	24,782,210	45,107,725	94,654,788
Increase (decrease)	5,221,305	5,473,103	3,342,665	14,037,072

- Please review if ‘unassigned’ – make/ have a plan
 - Indicate a plan by assigning purpose or project code
- Please review for completed/ abandoned projects – reassign if needed
- Please review for balances assigned to people no longer with UNT

Anecdotal Compilation



DALLAS - FORT WORTH / LEWISVILLE - COPPELL / EDUCATION

Coppell ISD anticipates enrollment decline amid discussions on school closures



By Jonathan Perriello | 5:21 PM Sep 25, 2024 CDT
Updated 12:38 PM Sep 27, 2024 CDT



Lewisville ISD considers closing, consolidating 20 campuses due to budget woes

By Bill Zeeble KERA News | Oct 14, 2024 Updated Oct 16, 2024

DALLAS - FORT WORTH / RICHARDSON / EDUCATION

School consolidation: Closures could save Richardson ISD nearly half of expected \$28M shortfall



By Kevin Cummings | 8:41 AM Apr 26, 2024 CDT
Updated 8:41 AM Apr 26, 2024 CDT



EDUCATION | NEWS | POLITICS

North Texas School Districts, Facing Low Enrollment and Budget Shortfalls, Close Campuses

Some school districts, including in Richardson, Irving, Plano and Fort Worth, lack millions of dollars and need higher enrollment, leaving difficult decisions to be made.

By Jacob Vaughn | March 26, 2024

Education

FWISD trustees grapple with school closures as enrollment dwindles, achievement idles

KERA | By Jacob Sanchez | Fort Worth Report
Published August 8, 2024 at 9:28 AM CDT



EDUCATION

Some of FWISD's middle schools consolidated this year. Here's how one campus is faring.

BY LINA RUIZ
SEPTEMBER 16, 2024 5:30 AM |

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2025 Legislative Session

School Vouchers

Ted Cruz

College Tuition

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UT System will expand free tuition and fees to all undergraduates whose families make \$100,000 or less

The Board of Regents is lifting the income threshold to expand eligibility across all nine of its UT System campuses.

BY KATE MCGEE NOV. 20, 2024 16 HOURS AGO

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FY24 Results (Unaudited)

Unaudited Fiscal Year 2024 Results



Summary Report of Revenue, Expenses & Transfers (Current Funds) for Fiscal Year ending August 31, 2024

Category	FY24 Budget	FY24 Actuals	Variance
Revenues			
Net Tuition and Fees	\$457,816,578	\$451,007,517	(\$6,809,061)
Sales of Goods and Services	106,829,372	119,686,462	12,857,090
Grants and Contracts	128,630,055	179,870,992	51,240,937
State Appropriations	182,881,014	179,159,290	(3,721,724)
All Other Revenue	68,569,405	71,920,178	3,350,773
Total: Revenues	944,726,424	1,001,644,439	56,918,015
Expenses			
Personnel Costs	499,836,336	511,647,820	(\$11,811,485)
Maintenance & Operation Costs	168,106,974	176,384,397	(8,277,422)
Scholarships, Exemptions, and Financial Aid	116,168,622	127,262,451	(11,093,829)
All Other Expenses	28,035,677	27,191,957	843,720
Total: Expenses	812,147,609	842,486,626	(30,339,017)
Transfers			
Transfers	130,267,609	108,563,873	21,703,736
Total: Transfers	130,267,609	108,563,873	21,703,736
Impact on Fund Balance	\$2,311,206	\$50,593,940	\$48,282,734

Year End Highlights

UNT closed fiscal year 2024 with a \$50.5M favorable impact to fund balance, which is \$48.2M greater than budgeted

- **Total revenues exceeded budget by \$57M**
- Net Tuition & Fees and State Appropriations were \$6.8M and \$3.7M lower than budgeted, respectively
- Sales of Goods & Services, Grants & Contracts, and All Other Revenue exceeded budget by a combined \$67.4M
- **Total expenses exceeded budget by \$30M**
- Personnel Costs (\$11.8M), Maintenance & Operations Costs (\$8.3M) & Scholarships, Exemptions & Financial Aid (\$11.1M) all exceeded budget
- All Other Expenses came in \$840K under budget
- **Total transfers came in \$21M under budget**

Facilities – Billing Updates FY25

Utilities -Work Orders - Sales Orders – Vehicle Rentals

FY 25 Billing Updates

•November Billing Schedule

- **11/25 - 11/27**: Work Orders, Sales Orders, and Vehicle Rentals-
- **12/01 - 12/03**: Utilities for October (Pending receipt from all utility companies; possible delays due to the holidays)
- [Facilities Billing Calendar](#) - Now available on our website!

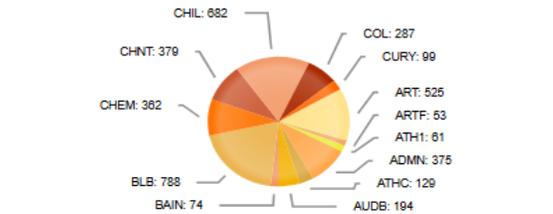
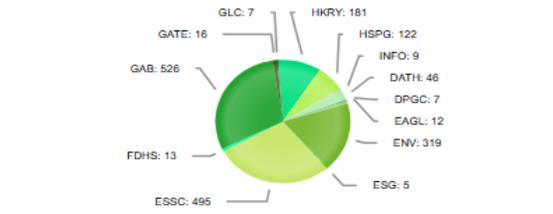
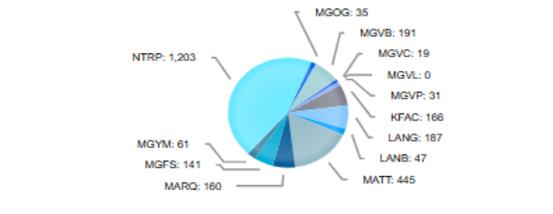
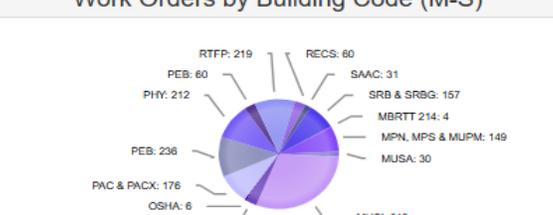
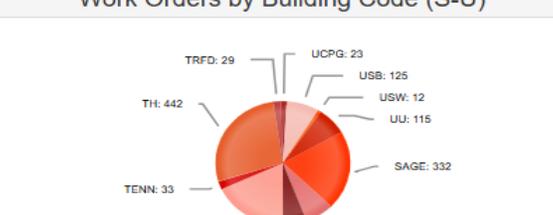
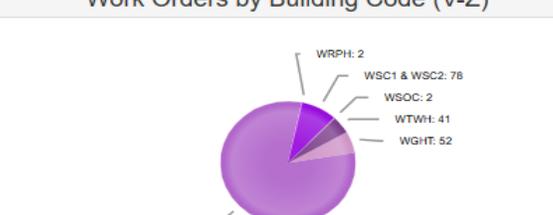
Important Notes:

- If a bill for a specific account has not been received, billing will proceed as scheduled. The customer will be notified, and the account will be processed later.

***Utilities billing is subject to change.** Please check periodically for updates.

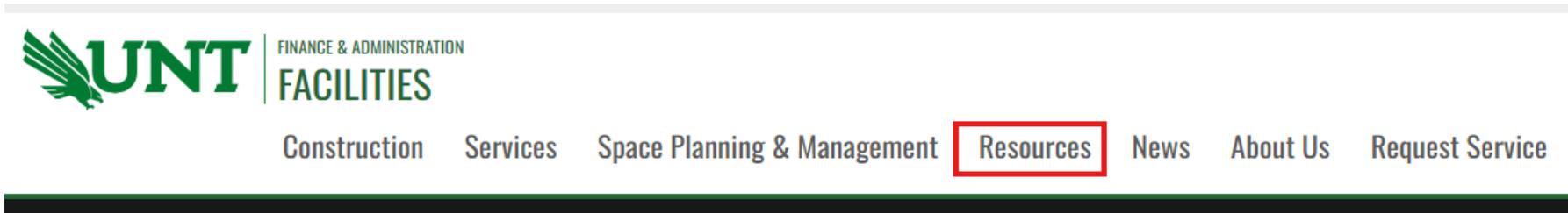
Work Order Search & Budget Tracking

Budget Officers and Building Reps will now be able to search work orders by building, work order number, or account in our maintenance system, WebTMA

Work Orders by Building Code (A-C)	Work Orders by Building Code (D-I)	Work Orders by Building Code (J-L)
 <p>CHIL: 682, COL: 287, CURY: 99, ART: 525, ARTF: 63, ATH1: 61, ADMN: 375, ATHC: 129, AUCB: 194, BAIN: 74, CHEM: 382, CHNT: 379</p> <p>ART, ARTF, ATH1, ADMN, ATHC, AUCB, BAIN, BLB, CHEM, CHNT, CHIL, COL, CURY</p>	 <p>GLC: 7, HKRY: 181, HSPG: 122, INFO: 9, DATH: 46, DPGC: 7, EAGL: 12, ENV: 319, ESG: 5, FDHS: 13, GAB: 526, GATE: 16</p> <p>DATH, DPGC, EAGL, ENV, ESG, ESSC, FDHS, GAB, GATE, GLC, HKRY, HSPG, INFO</p>	 <p>MGOG: 35, MGVB: 191, MGVC: 19, MGVL: 0, MGVP: 31, KFAC: 166, LANG: 187, LANB: 47, MATT: 445, NTRP: 1,203, MGVM: 61, MGFS: 141, MARQ: 160</p> <p>KFAC, LANG, LANB, MATT, MARQ, MGFS, MGVM, NTRP, MGOG, MGVB, MGVC, MGVL</p>
 <p>RTFP: 219, RECS: 60, SAAC: 31, SRB & SRBG: 157, MBRTT 214: 4, MPN, MPS & MUPM: 149, MUSA: 30, MUSA: 612, MHA: 64, OSHA: 6, PAC & PACX: 176, PEB: 236, PHY: 212, PEB: 60</p> <p>MBRTT 214, MPN, MPS & MUPM, MUSA, MUSI, MHA, OSHA, PAC & PACX, PEB, PHY, RECS, SAAC, SRB & SRBG</p>	 <p>TRFD: 29, UCPG: 23, USB: 125, USW: 12, UU: 115, SAGE: 332, SPHS: 111, SSB: 91, SYMR: 290, TENN: 33, TH: 442</p> <p>SAGE, SPHS, SSB, SYMR, TENN, TH, TRFD, UCPG, USB, USW, UU</p>	 <p>WRPH: 2, WSC1 & WSC2: 78, WSOC: 2, WTWH: 41, WGHT: 52, WH: 740</p> <p>WGHT, WH, WRPH, WSC1 & WSC2, WSOC, WTWH</p>
Building Information	Contact Information	Report List
https://facilities.unt.edu/resources/building-information.html	https://budget.unt.edu/all-budget-user-contacts.html https://facilities.unt.edu/resources/building-representative-program.html	<ul style="list-style-type: none"> Work Order Charges by Dept ID - Breakdown Charges Work Order Charges by Dept ID - Multiple Departments

Work Order Search & Budget Tracking

- For access to be granted you must fill out the [Work Order Tracking Request Form](#)



- Schedule online training and Q&A session via TEAMS as need
-Detail coming soon
- DEMO link: <https://uhttpsnt.webtma.com/app/login?returnUrl=%2F>

How To Contact Us

Utility Accounts, Consumption Data, and Cost:

- Utilities Billing: utilities.billing@unt.edu
- Alicia Anthony: Alicia.Anthony@unt.edu
- Mohit Patel: mohit.patel@unt.edu

Work Orders, Sales Orders, and WebTMA:

- Work Control: work.control@unt.edu
- Kathy Neira: oxsormira.neira@unt.edu

Billing Transaction and Accounting:

- Joyce Courtney: joyce.courtney@unt.edu

Power BI Reports, Updates and Training

Power BI Reports Update

11/21/2024

Total Power BI Reports: Production 114, UAT 16, In-Progress 21

Cognos will run in parallel until 12/20

Power BI Trainings

11/21/2024

In Person and Online trainings– All on Bridge
Not Granting any more Cognos Access

Announcements & Reminders

Announcements & Reminders

- **Upcoming University Budget Office Open Lab Dates:**

- Wednesday, December 11, 2024
- Tuesday, January 7, 2025



- **Upcoming Payroll Dates:**

- Thursday, December 19, 2024
- Thursday, January 9, 2025

- **Next Budget Broadcast will be held in the BLB 055 on Thursday
December 19, 2024**

Questions?