UNIVERSITY OF HOUSTON

FY 2010

PLANNING AND BUDGETING GUIDE

March 2009
Table of Contents

1. Planning and Budgeting Memorandums
   President’s Memorandum FY2010 Planning & Budgeting Guidelines ............ 7
   Provost Memorandum: Academic Affairs FY2010 Guidelines .................... 9

2. Formula Funding from the State of Texas
   Appropriations FY2010/11 compared to 2008/09 ...................................... 17
   Elements of Formula Funding ................................................................. 18
   Base Period Semester Credit Hour Trends ............................................... 19

3. Budget Development Process
   Flowchart .................................................................................................. 27
   Calendar ...................................................................................................... 28
   Executive Overview ..................................................................................... 29
   Budget Guidelines ....................................................................................... 30
   Budget Principles ......................................................................................... 33
   Salary Increase Guidelines for Staff Employees ......................................... 34
   ATB Guidelines for Staff Employees ......................................................... 36

4. Budget Training
   Budget Training Memo ............................................................................... 41
   Budget Training web links to Budget Overview and Training Guide ............. 42

5. Appendices
   University of Houston Mission and Goals ............................................... 47
   Glossary of Budgeting Terms ..................................................................... 48
   Full-Time Equivalent Position Definitions ............................................... 51
   Standard Work Hours/week for Part-time Faculty ..................................... 52
   Employer Matching Rate for Estimate of Benefit Costs ............................. 53
   SKIP Health Premium Rates and Contributions ......................................... 54
   FY2009 Non-Health Insurance Rates ....................................................... 55
   FY2010 Health Insurance Rates .................................................................. 56
   FY2010 Endowment Income ....................................................................... 59
   FY2010 Tech Fee Allocations ..................................................................... 85
   FY2010 Research Allocations ..................................................................... 86
   FY2010 IDC Allocations .............................................................................. 87
   FY2010 SSF Allocations .............................................................................. 89
   Contact List ................................................................................................. 90
Planning and Budgeting Memorandums
MEMORANDUM

DATE: December 01, 2008

TO: UH Vice Presidents

FROM: Renu Khator, President

RE: University of Houston FY 2010 Planning & Budgeting Process

This past summer six new goals for the University of Houston were approved by the Board of Regents: student success, national competitiveness (top-tier status), community advancement, athletic competitiveness, local and national recognition, and finally resource competitiveness. Making progress on all of these goals is essential if UH is to become one of the premier research universities in the nation — an institution that draws top faculty and students not only from the city and state, but from the nation and around the world. This fall I established a steering group of nine distinguished faculty, administrators, staff and students (Strategic Action Group) to design a process that will engage the campus community and identify strategies to ensure our progress toward these goals. You may learn more about the group and its work by going to http://www.uhsa.uh.edu/uhstrategic/.

As we begin the planning process for next year, we face significant challenges to funding initiatives in support of our new goals. The legislative session will begin in January, but the drumbeat of support for eliminating deregulated tuition has already started, including the filing of a bill that will freeze tuition for two years. Add to this the fragile state of the economy and the projections that the economic downturn will make its way to Texas in the early part of the new year. However, there are some positive developments, as well. The support for funding more tier one universities in Texas is stronger than ever in the halls of the state capitol. While the outcome of the session and our capacity to secure new resources remain uncertain, our resolve to move the university toward excellence must remain strong and sincere. The first step toward the pursuit of excellence must come from within.

It is within this context that I ask you to undertake this year’s budget planning process. The first step is to generate a pool of sufficient funds for initiatives and priorities that will be identified both by you through this planning process and the Strategic Action Group to propel us toward our goals. While there are six sources of revenue to generate this pool (state appropriations, tuition and fees, sponsored research, private donations, auxiliaries and internal reallocation), only three are available to us — state appropriations, tuition and fees, and internal reallocation. Sponsored
research funds are mandated to support research projects; private donations are restricted based on donor preferences; and auxiliary income is aimed at bringing self-sufficiency to auxiliary functions so they are not subsidized by state funds. With regard to the three available sources, we foresee several scenarios:

1. **Tuition and Fee Increases** – Three likely scenarios include:
   a. 6% increase for undergraduates, the cap as agreed upon last year
   b. 0% increase
   c. 3% increase as a mid-course

2. **New State Funding** – Three scenarios include:
   a. Increased formula funding
   b. Increased funding for tier one (e.g., Research Development Fund, Competitive Knowledge Fund, Texas Research Incentive Program)
   c. No new funding

3. **Internal Reallocation** – Two scenarios include:
   a. 5% reallocation this year
   b. 3% reallocation per year for the next 3 years

Our worst case scenario is to have no tuition and fee increases and no new state funding, while the best case scenario is to have a 6% increase in tuition and fees and significant increases in state funding. In either case, we need to include internal reallocation in our planning. Under the worst case scenario, the reallocated funds will be the only means of funding strategic initiatives, and under the best case scenario, they will bring internal efficiencies while increasing the size of the available pool.

Your working assumption for this year’s planning process is a 5% internal budget reallocation (which will be used to create a pool of central resources for investment in new initiatives). You are asked to develop a plan that includes the following elements:

1. A plan for a 5% budget reallocation.
2. A narrative describing the 1-3 year strategic direction of your division as it relates to accomplishing the university’s goals.
3. Funding requests for new initiatives with justifications for how they will help the university achieve its goals.
4. Recent accomplishments in your division, tied to performance measures where possible, that justify your planned new initiatives and requests for resources in FY10.
5. Identification of major renovation and construction needs within your division.

I have asked Provost Strickland and Executive Vice President Carlucci to take the lead in implementing this planning process. They will distribute a follow-up memo providing more specific guidelines for the process. I appreciate your commitment to making UH a stronger, better university.

cc: President’s Cabinet
DATE: December 16, 2008

TO: University of Houston Deans

FROM: Jerald Strickland, Interim Senior Vice President for Academic Affairs and Provost

RE: University of Houston FY 2010 Planning & Budgeting Guidelines

Planning Assumptions

This past summer six new goals for the University of Houston were approved by the Board of Regents. They include national competitiveness, student success, community advancement, athletic competitiveness, local and national recognition, and competitive resources. Accomplishment of all of these goals is essential if UH is to become one of the premier research universities in the nation – an institution that draws top faculty and students not only from the city and state, but from the nation and around the world. Currently, the UH Strategic Action Group (a committee of faculty, staff and students that President Khator appointed this fall) is examining how we might move forward on these goals. The university’s goals plus the findings of the Strategic Action Group will guide our planning activities in FY 2010 and beyond.

As we begin the planning process for next year, we face significant challenges to funding new initiatives in support of our goals. With regard to tuition and fees, we have a ceiling on rate increases at the undergraduate level of 6% (as a result of an agreement struck last year with the Student Government Association and Board of Regents). The extent to which we can approach this ceiling will depend upon the deliberations of the tuition and fee committee and the Board of Regents. Given the impact the economic downturn is having on families, there will be significant pressure not to increase tuition and fees next year. However, we have some flexibility: First, we anticipate increased tuition and fee revenues next year as a result of projected enrollment increases (even if there are no rate increases). If they materialize we will be able to invest these resources in a broad range of initiatives that move us closer to achieving the university’s goals. Second, there is no rate increase ceiling on graduate and professional tuition and fees, which will enable us to make progress in master’s, doctoral and professional programs, including through the use of differential designated tuition (DDT).

Similarly, with regard to new state funding, it would be unwise to predict anything more than a flat appropriation considering the state of the economy. However, it must be said that support for funding more tier-one universities in the state is increasing, which may translate into new resources for UH. Also, the university’s enrollment growth during the fall may position us to garner a larger share of the formula funding pie – even if total state funding remains flat.
Nevertheless, if we are to ensure that the University of Houston moves forward next year, we cannot count on the prospect of new state resources and tuition and fees. Budget reallocation must be part of our planning process. To that end, President Khator is requiring each of the divisions and colleges to identify in their FY10 plans reallocations of 5% from their administrative budgets. These funds will be combined with existing reserves, as well as the potentially modest additional resources we receive through tuition and fee rate increases, new state funding, and enrollment growth, to create a pool of central resources for investment in new initiatives. In your FY 2010 plans you are invited to make requests for new funding from this pool of resources. However, competition will be intense, and proposed initiatives will receive serious consideration only if they allow us to make significant progress on the university’s goals.

With respect to faculty and staff salary increases, decisions will be made separately from the planning process this year, once we have a clearer picture of the resources available to us in FY10. Be assured, however, that faculty and staff constitute the university’s most valuable asset, and ensuring competitive compensation is among our highest priorities.

With respect to endowment earnings, the Board of Regents is considering a reduction to the pay-out next year, since commitments have exceeded generated income due to recent declines in the stock market. In developing a strategy for managing a lower pay-out, it is our intention to protect student scholarships to the greatest extent possible. Nevertheless, you should be aware that this is taking place.

Finally, in developing your plan we ask that you take the steps necessary to ensure broad participation in your college. Your planning process should extend down to the departmental level to facilitate meaningful shared governance on behalf of faculty. You should also create opportunities for students to participate, since they will ultimately pay for any tuition and fee increases.

Components of College Plans

The components of your college plans will be somewhat different this year than they have been in the past. First, the format will be more standardized, with the expectation that this will reduce the time you spend preparing these documents while at the same time providing us with more concise information that will facilitates the review and decision-making process. (We are also standardizing the format with an eye toward web-based submission of your plans next year.) Second, you will be asked to describe your plans specifically within the context of the university’s new goals and establish a progress card for your college in relation to these goals. In future years, the performance measures you select for your progress cards will be used to evaluate how successful you have been in moving the university forward in accomplishing its goals. Also, for the first time this year, your plans will be posted on the university’s web site (not including information that must be kept confidential). In the interest of transparency it is important that faculty, students, staff and the community have knowledge of your plans for your college.

College Progress Cards

This past summer, when President Khator and the Board of Regents established the university’s new goals, they also established a progress card with related performance measures (attached). Upon the President’s direction, the divisions and colleges must now create progress cards, as well. Like the university’s progress card, yours should include quantifiable performance
measures that relate directly to the university's goals. We recognize that this will be a challenging process, so we have asked Ed Hughetz to assist you. Mr. Hughetz was instrumental in developing the university's progress card and will be able to guide you through the process.

Once established, your progress cards, along with the university's goals, will serve as the basis on which you will identify new initiatives and request new resources in your annual plans and budgets. And, as indicated above, they will also be the means through which the colleges are evaluated with respect to how successful your plans have been in accomplishing the goals of the institution.

Three-Year Strategic Direction

The body of your FY 2010 plan will include two major components: a narrative describing the three-year strategic direction of your college followed by a set of forms requesting resources for new initiatives in FY10 (described in the following section). The purpose of the three-year strategic direction is to provide an overarching rationale for your proposed FY10 investments, by placing them within the context of your near-term efforts to move your college forward in accomplishing the goals of the university. The narrative should not exceed five single spaced pages. In it you should include the following sections:

- Faculty Hiring Plan
  In the faculty hiring plan you should discuss your needs for both tenure-track and non-tenure-track faculty, as well as the facilities and infrastructure needed to support them (i.e., start-up). New positions should be justified in terms of the expansion of an existing program, or the creation of a new one, in a high-demand discipline or a discipline that will move us closer to becoming a tier-one research university — in other words, programs that will enable us to increase enrollment, particularly at the graduate and professional levels, or that will increase our research funding, scholarship and other measures of excellence. President Khator has identified the following priorities that bear directly on faculty hiring:
  - Building programs in energy, the health sciences, and the arts
  - Hiring faculty stars — scientists and scholars (and their teams of faculty and graduate students) who can make an immediate impact on the reputation of UH through their research funding and publications
  - Hiring instructional faculty to meet educational needs at off-campus centers

To the extent that these priorities are applicable to your college, you should include them in your faculty hiring plan. In addition to discussing your faculty hiring plan in your three-year strategic direction narrative, we ask that you complete a Three-Year Faculty Hiring Plan form (attached) on which you should identify proposed faculty lines, salaries and start-up for FY10 through FY12.

- Plan for Student Enrollment, Persistence and Learning
  This plan should include initiatives designed to increase the number and quality of students at both the undergraduate and graduate levels, as well as enhance student persistence and graduation. Examples include student advising, undergraduate scholarships, retention programs, and graduate stipends. You should also include in this plan initiatives designed to improve and assess student learning, as they are critical to retention and graduation. President Khator has identified the following priorities with respect to student enrollment:
→ Increase total enrollment by 2% per year for the next several years
→ Improve the academic qualifications of FTIC freshmen
→ Increase the percentage of graduate and professional students within the total student population (from 20% to 25%)

To the extent that your college can help the university achieve these goals you should discuss them in your plan.

- **Plan for Administrative Support and Infrastructure**

  We understand that having adequate administrative support and infrastructure is essential to the achievement of your goals and the effective operation of your college, especially since we are looking to increase the number of students and faculty on campus. Therefore, you should include in your plans your expanding needs for M&O, academic support staff, IT resources, facilities, etc.

In writing your three-year strategic direction, you should discuss your initiatives within the context of the university’s new goals, especially national competitiveness, student success, and community advancement, since they are the most directly applicable to your operations. You should also relate your initiatives to the performance measures on the university’s progress card. Student enrollment, research and scholarship productivity, and retention and graduation rates, for example, are in large part the responsibility of the colleges and Academic Affairs. Demonstrating past success in these areas, and identifying goals for future performance, will make your plans more compelling and better justify an investment of central resources.

Finally, in order for us to assess our investments for the current fiscal year, please include with your strategic direction narrative brief updates on the status of each new faculty line created in FY08, as well as other college initiatives planned for FY08 and funded through central resources. Also, please include a brief description of the process through which your plan was developed.

**FY 2010 Funding Requests**

There are two forms to be completed in order to request new resources for FY10:

- **Fiscal Year 2010 Faculty Hiring Plan**

  This form is to be completed for each new and vacant faculty position you are proposing to search for in FY10. Requests to fill vacant positions are new to the planning process this year and have been added for the following reasons: (1) to ensure that these positions are being filled in accordance with your college’s plan, and (2) to help us meet your needs through a combination of both new and vacant lines. Resources at the university are scarce, and only so many faculty searches can take place in a year. Therefore, to the greatest extent possible we want the colleges to fill vacant lines first, before resources are allocated to new lines. We have also asked you to identify your start-up needs for each position, since salary is only part of the funding requirement (and sometimes not the largest part).

- **Fiscal Year 2010 Initiatives Request**

  This form is to be completed for each new initiative, other than faculty lines, for which you are requesting new funding in FY10. These initiatives should constitute the first-year investments for the activities described in your Plan for Student Enrollment, Persistence and
Learning and your Plan for Administrative Support and Infrastructure in your three-year strategic direction.

On both the faculty hiring and new initiative request forms you are asked to provide a position/initiative description, demonstrate how the proposed investment advances the university’s goals, and identify anticipated outcomes. How compellingly you make the case for your proposed investments on these forms will be a major determining factor in whether you receive central resources. We urge you to be concise in providing this information – using the three-year strategic direction to set the context for the proposed investments should enable you to do so (this is part of its intended purpose). However, the cells on the Excel spreadsheet will expand to facilitate a longer response if necessary. You will also notice that there is space on these forms to identify your college’s funding contribution. Because resources are so limited, a college match will be looked upon favorably when considering which initiatives to fund centrally.

Other Forms to Be Completed:

- **Summary of Fiscal Year 2010 Needs and Initiatives** to include all initiatives for which you completed an FY10 Faculty Hiring Plan form or FY10 Initiatives Request.

- **Fiscal Year 2010 Proposed Adjustments to College Based Tuition and Fees** to include all initiatives for which you completed an FY10 Faculty Hiring Plan form or FY10 Initiatives Request and that you are proposing to fund through an increase to college-based tuition and fees.

- **College Enrollment Projections for FY 2010**

- **Three Year Faculty Hiring Plan** to include proposed faculty hires in FY10, FY11 and FY12. Your requested positions for FY10 in this plan should match those for which you completed an FY10 Faculty Hiring Plan form.

- **Funding for Reallocation in Fiscal Year 2010** to include the uses and dollar value of resources that will constitute your 5% budget reallocation. Resources cannot be taken from instructional budgets. Craig Ness will forward to you the amount of resources to be reallocated by your college.

**Submission and Review of Plans**

Your plans are due to Ed Hugetz on or before **February 2**. Your progress cards are due on or before **March 2**. In the interim, Mr. Hugetz and Craig Ness will be available to guide you in the preparation of these materials. Plan and budget hearings will be scheduled for the week of February 9. Holding the hearings at this time will provide us with a forum to discuss your requests for new resources and weigh them against other institutional priorities as we develop the university’s tuition and fee plan.
## University of Houston Progress Card

### 1. Nationally Competitive Research University

<table>
<thead>
<tr>
<th>Source</th>
<th>2008 Source, Period, June-08</th>
<th>2009 Source, Period, June-09</th>
<th>2010 Source, Period, June-10</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>1.a.</strong> Total Research Expenditures</td>
<td>NSF Fiscal year 73,542,000.00</td>
<td>NSF Fiscal year 40,116,000.00</td>
<td></td>
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<tr>
<td><strong>1.d.</strong> Number of Citations</td>
<td>UH IRISI, Rolling 5 year, 20828</td>
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<tr>
<td><strong>1.e.</strong> Number of Doctorates Awarded</td>
<td>IPEDS Fiscal year, 209</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>1.f.</strong> Number of Postdoctoral Appointees</td>
<td>NSF Fall 158</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

### 2. A. UH System: Student Success

<table>
<thead>
<tr>
<th>Source</th>
<th>2008 Source, Period, June-08</th>
<th>2009 Source, Period, June-09</th>
<th>2010 Source, Period, June-10</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total Enrollment</td>
<td>IPEDS Fall 34663</td>
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<td></td>
</tr>
<tr>
<td>Transfer Retention Rate (First Year)</td>
<td>UH IR Fall, 77%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Transfer Graduation Rate (4 Year)</td>
<td>LBE Fall, 58%</td>
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<tr>
<td>Total Degrees Awarded</td>
<td>IPEDS Fiscal year, 6361</td>
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<tr>
<td>Student Satisfaction (Entering Seniors)</td>
<td>NSSE Spring, 77% (2001)</td>
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</table>

### 2. B. UH: Student Success

<table>
<thead>
<tr>
<th>Source</th>
<th>2008 Source, Period, June-08</th>
<th>2009 Source, Period, June-09</th>
<th>2010 Source, Period, June-10</th>
</tr>
</thead>
<tbody>
<tr>
<td>FTIC Retention Rate (First Year)</td>
<td>IPEDS Fall, 77%</td>
<td></td>
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<tr>
<td>FTIC Graduation Rate (6 Year)</td>
<td>IPEDS Fall, 63%</td>
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<td></td>
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<tr>
<td>Percentage of Graduates/Professional Students</td>
<td>IPEDS Fall, 20%</td>
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<tr>
<td>Freshmen Acceptance Rate</td>
<td>IPEDS Fall, 77%</td>
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<tr>
<td>Freshman Average SAT</td>
<td>IPEDS Fall, 1055</td>
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<tr>
<td>Course Completion Rate</td>
<td>THECB Fall, 94.4%</td>
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</tr>
<tr>
<td>Student Satisfaction (All Students)</td>
<td>UH SA</td>
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### 3. Community Advancement

<table>
<thead>
<tr>
<th>Source</th>
<th>2008 Source, Period, June-08</th>
<th>2009 Source, Period, June-09</th>
<th>2010 Source, Period, June-10</th>
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<tbody>
<tr>
<td>Percent Baccalaureate Graduates Enrolled or Employed within One Year</td>
<td>THECB Fiscal Year, 83%</td>
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<td>Number of Courses with Community Engagement Activities Offered</td>
<td>UH IR Fiscal Year, 537</td>
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<td>Research Awards with Community Emphasis</td>
<td>UH Research Fiscal Year, 121</td>
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### 4. Athletics Competitiveness

<table>
<thead>
<tr>
<th>Source</th>
<th>2008 Source, Period, June-08</th>
<th>2009 Source, Period, June-09</th>
<th>2010 Source, Period, June-10</th>
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<tbody>
<tr>
<td>University Athletics Overall Academic Progress Rate</td>
<td>NCAA Fiscal Year, 944</td>
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<tr>
<td>Total team Sports Wins</td>
<td>NCAA Fiscal Year, 185</td>
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<tr>
<td>C-USA Championships (Individual/Team)</td>
<td>UH Athletics Fiscal Year, 10.14</td>
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<tr>
<td>NCAA Post Season Qualifiers (Individual/Team)</td>
<td>UH Athletics Fiscal Year, 3675</td>
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<td>Attendance (Average) Football/Men's Basketball</td>
<td>UH Athletics Fiscal Year, 106274342</td>
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</table>

### 5. Local and National Recognition

**Measures under development**

### 6. Competitive Resources

<table>
<thead>
<tr>
<th>Source</th>
<th>2008 Source, Period, June-08</th>
<th>2009 Source, Period, June-09</th>
<th>2010 Source, Period, June-10</th>
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<tbody>
<tr>
<td>Total State Appropriations per FTE Student</td>
<td>THECB Fiscal Year, 6,695,00</td>
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<td>Total Expenditures per FTE Student</td>
<td>THECB Fiscal Year, 19,143,00</td>
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<tr>
<td>Endowment</td>
<td>UH A&amp;F Fiscal Year, 402,000,000.00</td>
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<tr>
<td>Total Annual Giving</td>
<td>YSE Fiscal Year, 48,800,000.00</td>
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<tr>
<td>Alumni Giving Rate</td>
<td>US News Fiscal Year, 5.3</td>
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Formula Funding from the State of Texas
### Conference Committee vs FY08-FY09 Base

#### University of Houston

<table>
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<tr>
<td>Operations Support</td>
<td>$129,351,823</td>
<td>$129,351,823</td>
<td>$258,703,646</td>
<td>$140,017,254</td>
<td>$140,017,254</td>
<td>$280,034,508</td>
<td>$21,330,862</td>
<td>8.2%</td>
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<tr>
<td>Teaching Experience</td>
<td>2,913,226</td>
<td>2,913,226</td>
<td>5,826,452</td>
<td>2,730,905</td>
<td>2,730,905</td>
<td>5,461,810</td>
<td>(364,642)</td>
<td>-6.3%</td>
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<td>E&amp;G Space Support</td>
<td>26,398,470</td>
<td>26,398,470</td>
<td>52,796,940</td>
<td>31,523,918</td>
<td>31,523,918</td>
<td>63,047,836</td>
<td>10,250,896</td>
<td>19.4%</td>
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<tr>
<td>Excellence Formula Funding</td>
<td>3,999,193</td>
<td>3,999,193</td>
<td>7,998,386</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>(7,998,386)</td>
<td>-100.0%</td>
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<tr>
<td><strong>SUBTOTAL</strong></td>
<td>162,662,712</td>
<td>162,662,712</td>
<td>325,352,424</td>
<td>174,272,077</td>
<td>174,272,077</td>
<td>348,544,154</td>
<td>23,218,730</td>
<td>7.1%</td>
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#### Special Items

- **Texas Center for Superconductivity**
- **Small Business Development Center**
- **Houston Partnership for Space Exploration**
- **Health Law and Policy Institute**
- **Center for Public Policy**
- **Partnerships-Support Publ. Schools**
- **Commercial Development of Space**
- **Learning and Computation Center**
- **Energy Research**
- **Texas Competitive Knowledge Fund**
- **Institutional Enhancement**

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<tr>
<th>Special Items</th>
<th>3,607,624</th>
<th>3,607,624</th>
<th>7,215,250</th>
<th>3,607,625</th>
<th>3,607,625</th>
<th>7,215,250</th>
<th>-</th>
<th>0.0%</th>
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<td><strong>SUBTOTAL</strong></td>
<td>23,139,123</td>
<td>18,319,130</td>
<td>41,638,253</td>
<td>23,063,750</td>
<td>23,063,750</td>
<td>46,127,500</td>
<td>4,489,247</td>
<td>10.8%</td>
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#### Other Items

- **Tuition Revenue Bonds**
- **Organized Activities**
- **Skiles Act Revenue Bond Retirement**
- **Texas Public Education Grant**
- **Worker' Compensation Insurance**
- **Staff Group Insurance Premiums**
- **Research Development Fund**

<table>
<thead>
<tr>
<th>Other Items</th>
<th>11,879,624</th>
<th>11,875,874</th>
<th>23,755,498</th>
<th>11,652,230</th>
<th>11,642,262</th>
<th>23,294,492</th>
<th>(461,006)</th>
<th>-1.9%</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>SUBTOTAL</strong></td>
<td>32,426,249</td>
<td>32,426,256</td>
<td>64,918,505</td>
<td>32,234,840</td>
<td>32,631,975</td>
<td>64,866,815</td>
<td>(5,690)</td>
<td>-0.1%</td>
</tr>
</tbody>
</table>

#### Method of Finance

- **Net General Revenue**
- **GENERAL REVENUE SUBTOTAL**
- **Board Authorized Tuition Increases**
- **Estimated E&G Income**
- **GR DEDICATED SUBTOTAL**

<table>
<thead>
<tr>
<th>Method of Finance</th>
<th>$ 159,275,465</th>
<th>$ 154,134,306</th>
<th>$ 313,409,771</th>
<th>$ 167,082,499</th>
<th>$ 167,341,715</th>
<th>$ 334,424,214</th>
<th>$ 21,014,443</th>
<th>6.7%</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>TO TAL</strong></td>
<td>$ 218,408,084</td>
<td>$ 213,474,098</td>
<td>$ 431,882,182</td>
<td>$ 229,570,667</td>
<td>$ 229,967,802</td>
<td>$ 459,538,469</td>
<td>$ 27,656,287</td>
<td>6.4%</td>
</tr>
</tbody>
</table>

#### FTE Positions

- **Authorized**
- **Actual**

<table>
<thead>
<tr>
<th>FTE Positions</th>
<th>3,052.6</th>
<th>3,052.6</th>
<th>2,839.3</th>
<th>2,839.3</th>
</tr>
</thead>
<tbody>
<tr>
<td>Authorized</td>
<td>2,866.0</td>
<td>2,866.0</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

#### Additional One-time Funding

- **Energy Research (one-time ARRA funds)**
- **Wind Energy re-appropriated (pending in HB 4586)**

<table>
<thead>
<tr>
<th>Additional One-time Funding</th>
<th>$ 3,000,000</th>
<th>$ 4,245,244</th>
</tr>
</thead>
<tbody>
<tr>
<td>For &quot;the purpose of developing and constructing the National Large Wind Turbine Research and Testing Facility&quot;</td>
<td>$ 236,815,911</td>
<td></td>
</tr>
</tbody>
</table>

| r:\app\09\appn bills\3.0 Appropriations |
Elements of Formula Funding
FY2010-11 Biennium

1. Instruction and Operations Formula (about 81% of total formula)
   (Funding for Faculty Salaries, DOE, Instructional Administration, Library, Research Enhancement, Student Services, Institutional Support)
   Funding equals semester credit hours times 62.19 times rate below:

<table>
<thead>
<tr>
<th></th>
<th>Lower Division</th>
<th>Upper Division</th>
<th>Masters</th>
<th>Doctoral</th>
<th>Special Professional</th>
</tr>
</thead>
<tbody>
<tr>
<td>Liberal Arts</td>
<td>1.00</td>
<td>1.72</td>
<td>4.18</td>
<td>9.29</td>
<td></td>
</tr>
<tr>
<td>Science</td>
<td>1.71</td>
<td>2.97</td>
<td>8.09</td>
<td>20.52</td>
<td></td>
</tr>
<tr>
<td>Fine Arts</td>
<td>1.39</td>
<td>2.32</td>
<td>5.43</td>
<td>7.19</td>
<td></td>
</tr>
<tr>
<td>Teacher Ed</td>
<td>1.42</td>
<td>1.74</td>
<td>2.48</td>
<td>7.64</td>
<td></td>
</tr>
<tr>
<td>Agriculture</td>
<td>1.87</td>
<td>2.52</td>
<td>7.07</td>
<td>9.91</td>
<td></td>
</tr>
<tr>
<td>Engineering</td>
<td>2.41</td>
<td>3.87</td>
<td>7.63</td>
<td>15.96</td>
<td></td>
</tr>
<tr>
<td>Home Economics</td>
<td>1.06</td>
<td>1.70</td>
<td>2.66</td>
<td>6.62</td>
<td></td>
</tr>
<tr>
<td>Law</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>3.85</td>
</tr>
<tr>
<td>Social Services</td>
<td>1.94</td>
<td>2.05</td>
<td>2.97</td>
<td>13.84</td>
<td></td>
</tr>
<tr>
<td>Library Science</td>
<td>1.14</td>
<td>1.09</td>
<td>2.63</td>
<td>6.65</td>
<td></td>
</tr>
<tr>
<td>Vocational Training</td>
<td>1.66</td>
<td>1.97</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Physical Training</td>
<td>1.29</td>
<td>1.28</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Health Services</td>
<td>1.24</td>
<td>1.98</td>
<td>3.21</td>
<td>8.49</td>
<td>8.49</td>
</tr>
<tr>
<td>Pharmacy</td>
<td>0.71</td>
<td>4.24</td>
<td>19.87</td>
<td>29.55</td>
<td>3.79</td>
</tr>
<tr>
<td>Business Admin.</td>
<td>1.11</td>
<td>1.73</td>
<td>3.42</td>
<td>24.27</td>
<td></td>
</tr>
<tr>
<td>Optometry</td>
<td></td>
<td>5.46</td>
<td></td>
<td>19.12</td>
<td>7.00</td>
</tr>
<tr>
<td>Teacher Ed Practice</td>
<td>1.30</td>
<td>1.78</td>
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<tr>
<td>Technology</td>
<td>1.90</td>
<td>2.38</td>
<td>4.41</td>
<td>3.37</td>
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<tr>
<td>Nursing</td>
<td>1.94</td>
<td>2.45</td>
<td>4.73</td>
<td>10.64</td>
<td></td>
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<tr>
<td>Developmental Ed</td>
<td>1.00</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Veterinary Medicine</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>16.53</td>
</tr>
</tbody>
</table>

2. Teaching Experience Supplement (about 3% of total formula)
   Annual funding equals 10 percent of funds generated above from undergraduate hours taught by tenured or tenure track faculty.

3. E&G Space Support (about 16% of total formula)
   (Funding for Physical Plant and Utilities)
   Annual funding equals the Coordinating Board’s space standard in E&G square feet times $6.21/square foot
University of Houston Base Period Semester Credit Hour Trends

<table>
<thead>
<tr>
<th>Year</th>
<th>2000-01</th>
<th>2002-03</th>
<th>2004-05</th>
<th>2006-07</th>
<th>2008-09</th>
<th>Eight-year Change 00-01 to 08-09</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>University of Houston Total</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Lower Division</td>
<td>370,011</td>
<td>398,242</td>
<td>388,791</td>
<td>378,689</td>
<td>410,699</td>
<td>8%     -2%   -3%   3%   11%</td>
</tr>
<tr>
<td>Upper Division</td>
<td>257,830</td>
<td>277,026</td>
<td>284,825</td>
<td>289,120</td>
<td>291,226</td>
<td>7%     3%     2%    16%  13%</td>
</tr>
<tr>
<td>Masters</td>
<td>81,576</td>
<td>84,365</td>
<td>78,095</td>
<td>72,011</td>
<td>85,139</td>
<td>3%     -7%    -8%   -18%  4%</td>
</tr>
<tr>
<td>Doctoral</td>
<td>19,677</td>
<td>20,105</td>
<td>22,989</td>
<td>21,532</td>
<td>18,880</td>
<td>2%     14%    -6%   14%  -4%</td>
</tr>
<tr>
<td>Special Profesn'l</td>
<td>47,967</td>
<td>60,619</td>
<td>61,895</td>
<td>60,773</td>
<td>60,610</td>
<td>26%    2%     -2%   32%  26%</td>
</tr>
<tr>
<td><strong>Total SCH</strong></td>
<td>777,061</td>
<td>840,357</td>
<td>836,595</td>
<td>822,125</td>
<td>866,554</td>
<td>8%     0%     -2%   7%   12%</td>
</tr>
</tbody>
</table>

Trends from 2000-01 through 2008-09

[Graph showing trends for different divisions and totals over the years]
<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>00-01 to</td>
<td>02-03 to</td>
<td>04-05 to</td>
</tr>
<tr>
<td>Architecture</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Lower Division</td>
<td>5,392</td>
<td>5,707</td>
<td>6,251</td>
<td>5,978</td>
<td>6,164</td>
<td>6%</td>
<td>10%</td>
<td>-4%</td>
</tr>
<tr>
<td>Upper Division</td>
<td>6,895</td>
<td>7,683</td>
<td>8,089</td>
<td>7,741</td>
<td>7,187</td>
<td>11%</td>
<td>5%</td>
<td>-4%</td>
</tr>
<tr>
<td>Masters</td>
<td>1,240</td>
<td>1,560</td>
<td>2,088</td>
<td>1,841</td>
<td>1,586</td>
<td>26%</td>
<td>34%</td>
<td>-12%</td>
</tr>
<tr>
<td>Doctoral</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Special Profesn’l</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Total SCH</td>
<td>13,527</td>
<td>14,950</td>
<td>16,428</td>
<td>15,560</td>
<td>14,937</td>
<td>11%</td>
<td>10%</td>
<td>-5%</td>
</tr>
<tr>
<td>Business Administration</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Lower Division</td>
<td>19,137</td>
<td>20,511</td>
<td>18,712</td>
<td>18,236</td>
<td>26,114</td>
<td>7%</td>
<td>-9%</td>
<td>-3%</td>
</tr>
<tr>
<td>Upper Division</td>
<td>63,213</td>
<td>73,996</td>
<td>72,308</td>
<td>78,275</td>
<td>83,438</td>
<td>17%</td>
<td>-2%</td>
<td>8%</td>
</tr>
<tr>
<td>Masters</td>
<td>21,408</td>
<td>20,294</td>
<td>19,295</td>
<td>17,382</td>
<td>24,058</td>
<td>-5%</td>
<td>-5%</td>
<td>-10%</td>
</tr>
<tr>
<td>Doctoral</td>
<td>927</td>
<td>909</td>
<td>1,149</td>
<td>1,185</td>
<td>1,101</td>
<td>-2%</td>
<td>26%</td>
<td>3%</td>
</tr>
<tr>
<td>Special Profesn’l</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Total SCH</td>
<td>104,685</td>
<td>115,710</td>
<td>111,464</td>
<td>115,078</td>
<td>134,711</td>
<td>11%</td>
<td>-4%</td>
<td>3%</td>
</tr>
<tr>
<td>Education</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Lower Division</td>
<td>9,615</td>
<td>11,864</td>
<td>15,847</td>
<td>16,623</td>
<td>23,068</td>
<td>23%</td>
<td>34%</td>
<td>5%</td>
</tr>
<tr>
<td>Upper Division</td>
<td>21,766</td>
<td>26,507</td>
<td>31,315</td>
<td>35,947</td>
<td>42,365</td>
<td>22%</td>
<td>18%</td>
<td>15%</td>
</tr>
<tr>
<td>Masters</td>
<td>20,190</td>
<td>19,617</td>
<td>15,540</td>
<td>11,638</td>
<td>10,165</td>
<td>-3%</td>
<td>-21%</td>
<td>-25%</td>
</tr>
<tr>
<td>Doctoral</td>
<td>6,008</td>
<td>5,009</td>
<td>5,491</td>
<td>5,047</td>
<td>3,647</td>
<td>-17%</td>
<td>10%</td>
<td>-8%</td>
</tr>
<tr>
<td>Special Profesn’l</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Total SCH</td>
<td>57,579</td>
<td>62,997</td>
<td>68,193</td>
<td>69,255</td>
<td>79,245</td>
<td>9%</td>
<td>8%</td>
<td>2%</td>
</tr>
</tbody>
</table>

University of Houston Base Period Semester Credit Hour Trends

Trends from 2000-01 through 2008-09
### University of Houston Base Period Semester Credit Hour Trends

#### Engineering

<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Lower Division</td>
<td>8,419</td>
<td>9,450</td>
<td>8,633</td>
<td>7,393</td>
<td>9,879</td>
</tr>
<tr>
<td>Upper Division</td>
<td>13,627</td>
<td>14,594</td>
<td>15,060</td>
<td>13,243</td>
<td>12,855</td>
</tr>
<tr>
<td>Masters</td>
<td>6,839</td>
<td>10,257</td>
<td>8,077</td>
<td>6,204</td>
<td>10,738</td>
</tr>
<tr>
<td>Doctoral</td>
<td>2,325</td>
<td>3,202</td>
<td>3,862</td>
<td>3,202</td>
<td>2,751</td>
</tr>
<tr>
<td>Special Profesn’1</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Total SCH</td>
<td>31,210</td>
<td>37,503</td>
<td>35,632</td>
<td>30,042</td>
<td>36,223</td>
</tr>
</tbody>
</table>

#### Biennial Percent Change

<table>
<thead>
<tr>
<th>Period</th>
<th>Lower Division</th>
<th>Upper Division</th>
<th>Masters</th>
<th>Doctoral</th>
<th>Special Profesn’1</th>
<th>Total SCH</th>
</tr>
</thead>
<tbody>
<tr>
<td>00-01 to 02-03</td>
<td>12%</td>
<td>7%</td>
<td>50%</td>
<td>38%</td>
<td></td>
<td>20%</td>
</tr>
<tr>
<td>02-03 to 04-05</td>
<td>-9%</td>
<td>3%</td>
<td>-21%</td>
<td>21%</td>
<td></td>
<td>-5%</td>
</tr>
<tr>
<td>04-05 to 06-07</td>
<td>-14%</td>
<td>-12%</td>
<td>-23%</td>
<td>-17%</td>
<td></td>
<td>-16%</td>
</tr>
<tr>
<td>06-07 to 08-09</td>
<td>34%</td>
<td>-3%</td>
<td>73%</td>
<td>-14%</td>
<td></td>
<td>21%</td>
</tr>
</tbody>
</table>

#### Hotel & Restaurant Management

<table>
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<tr>
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<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Lower Division</td>
<td>6,617</td>
<td>5,812</td>
<td>8,009</td>
<td>10,754</td>
<td>11,486</td>
</tr>
<tr>
<td>Upper Division</td>
<td>7,067</td>
<td>7,950</td>
<td>8,453</td>
<td>9,543</td>
<td>9,953</td>
</tr>
<tr>
<td>Masters</td>
<td>1,143</td>
<td>1,218</td>
<td>1,257</td>
<td>850</td>
<td>1,020</td>
</tr>
<tr>
<td>Doctoral</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Special Profesn’1</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Total SCH</td>
<td>14,827</td>
<td>14,980</td>
<td>17,719</td>
<td>21,147</td>
<td>22,459</td>
</tr>
</tbody>
</table>

#### Biennial Percent Change

<table>
<thead>
<tr>
<th>Period</th>
<th>Lower Division</th>
<th>Upper Division</th>
<th>Masters</th>
<th>Doctoral</th>
<th>Special Profesn’1</th>
<th>Total SCH</th>
</tr>
</thead>
<tbody>
<tr>
<td>00-01 to 02-03</td>
<td>-12%</td>
<td>12%</td>
<td>38%</td>
<td>7%</td>
<td></td>
<td>1%</td>
</tr>
<tr>
<td>02-03 to 04-05</td>
<td>38%</td>
<td>6%</td>
<td>13%</td>
<td>3%</td>
<td></td>
<td>18%</td>
</tr>
<tr>
<td>04-05 to 06-07</td>
<td>34%</td>
<td>-3%</td>
<td>-12%</td>
<td>-32%</td>
<td></td>
<td>-3%</td>
</tr>
<tr>
<td>06-07 to 08-09</td>
<td>7%</td>
<td>4%</td>
<td>4%</td>
<td>20%</td>
<td>-11%</td>
<td>51%</td>
</tr>
</tbody>
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#### College of Liberal Arts and Social Sciences

<table>
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<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Lower Division</td>
<td>192,011</td>
<td>209,992</td>
<td>199,728</td>
<td>185,178</td>
<td>187,813</td>
</tr>
<tr>
<td>Upper Division</td>
<td>86,147</td>
<td>94,321</td>
<td>99,151</td>
<td>92,167</td>
<td>80,117</td>
</tr>
<tr>
<td>Masters</td>
<td>10,452</td>
<td>12,723</td>
<td>12,311</td>
<td>13,326</td>
<td>12,005</td>
</tr>
<tr>
<td>Doctoral</td>
<td>4,863</td>
<td>4,794</td>
<td>4,829</td>
<td>4,406</td>
<td>4,970</td>
</tr>
<tr>
<td>Special Profesn’1</td>
<td></td>
<td></td>
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#### Biennial Percent Change

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<tr>
<td>04-05 to 06-07</td>
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### University of Houston Base Period Semester Credit Hour Trends

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<td>31,774</td>
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<td>1,544</td>
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**Biennial Percent Change**

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University of Houston Base Period Semester Credit Hour Trends

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<th>2002-03</th>
<th>2004-05</th>
<th>2006-07</th>
<th>2008-09</th>
<th>00-01 to 02-03</th>
<th>02-03 to 04-05</th>
<th>04-05 to 06-07</th>
<th>06-07 to 08-09</th>
<th>Eight-year Change 00-01 to 08-09</th>
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<tr>
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<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>00-01 to</td>
<td>02-03 to</td>
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<td>02-03 to</td>
<td>04-05 to</td>
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<tr>
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<td>7,842</td>
<td>8,414</td>
<td>8,748</td>
<td>9,229</td>
<td>00-01 to</td>
<td>02-03 to</td>
<td>04-05 to</td>
<td>06-07 to</td>
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<td></td>
<td></td>
<td></td>
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<td>02-03 to</td>
<td>04-05 to</td>
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<tr>
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<td>1,630</td>
<td>1,316</td>
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<td>3,526</td>
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<td>02-03 to</td>
<td>04-05 to</td>
<td>06-07 to</td>
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<td>02-03 to</td>
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---Biennial Percent Change---

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<th>04-05 to 06-07</th>
<th>06-07 to 08-09</th>
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<th>04-05 to 06-07</th>
<th>06-07 to 08-09</th>
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<th>04-05 to 06-07</th>
<th>06-07 to 08-09</th>
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<tr>
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Trends from 2000-01 through 2008-09

Adjustments made by: 6-0 UH Base Period SCH Trends FY09-10
Budget Development Process
University of Houston
FY2010 Operating Budget Process Flowchart

Budget Process Begins
with Campus-wide Budget Guidelines

Colleges
Prepare Budget Requests

Non-Academic Departments
Prepare Budget Requests

Provost hears requests from
College Deans and prepares
academic Recommendations

VP’s hear requests from
Departments and prepare
Recommendations

Budget Hearings
President, Provost, CFO,
hear requests from
Vice President and Provost

Board Approves
New Tuition & Fee Rates

President determines
Salary Increases and
Final Allocations

Complete Budget with
Final Allocations

Budget Office
produces
budget documents

Regents
Review and approve budget

r:\planbudg\bud10\planning & budgeting guide\6.0 Budget flowchart
## Date

<table>
<thead>
<tr>
<th>Date</th>
<th>Event</th>
<th>Responsible Party</th>
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<td>Final day of 81st Legislature</td>
<td>Legislature</td>
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<tr>
<td>6/1/2009</td>
<td>Discuss Tuition and Fee plans based on Legislative Appropriations. (UH)</td>
<td>Provost, CFO</td>
</tr>
<tr>
<td>6/5&amp;6/2009</td>
<td>BOR Retreat</td>
<td>Chancellor</td>
</tr>
<tr>
<td>6/9/2009</td>
<td>Brief President Khator on UH FY2010 Plan &amp; Budget</td>
<td>Provost, CFO</td>
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<td>Salary increase decision (UH)</td>
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<td>6/10/2009</td>
<td>UH, UHCL, UHD, UHV for BOR Tuition &amp; Fees due</td>
<td>Campuses</td>
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<td>6/15/2009</td>
<td>Agenda signing &amp; distribution to BOR - FY2010 Tuition and Fees</td>
<td>Chancellor, Provost, CFO</td>
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<td>6/21/2009</td>
<td>Final day for Governor's Veto Proclamation</td>
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<td><strong>BOR Meeting for Tuition and Fee Approval</strong></td>
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<td>7/1/2009</td>
<td>UH, UHCL, UHD, UHV plan and bridge tables due for hearings</td>
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<td>Brief Chancellor Khator on FY2010 Plan &amp; Budget for all campuses</td>
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<td>Executive summary materials due to UHSA Budget Office</td>
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<td>Distribution of BOR committee meeting materials</td>
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r:\bud10\calendars\UHS Calendar FY10 d
The University of Houston  
Operating Budget for the Fiscal Year 2010

Executive Overview

The annual budget preparation process includes estimating revenues and expenditures. This includes all Educational and General Funds (Group 1), Designated Funds (Group 2), Auxiliary Funds (Group 3), and Restricted Funds (Group 4 and 5). Budgets are developed at the detail (cost center) level for all funds, except Sponsored Programs (Group 5). Sponsored Program cost centers are estimated by the Research Division and reported at the college level.

The final product of this process will convey: How much money we have to spend; where we got the money; what we plan to do with it; and why we plan to spend it in the way we are proposing.

Each operating unit is responsible for developing its own budget request. The dean or vice president of each operating unit will prepare a budget request in accordance with these guidelines. This request will be presented to the provost (in the case of a college) or the vice president (in the case of an administrative unit). The provost and vice presidents will then present the budget request for their respective divisions to the president. Requests should be justified within the context of the institutional goals as articulated by the president. After all the requests have been presented, the president will determine the final allocation of funds for the budget, within the context of the university goals.

Units are responsible for entering their budget requests directly into the Budget Development Module (BDM). After the final allocations have been communicated to the colleges and divisions, adjustments will be made to BDM.

Other highlights of the FY10 Operating Budget are:

State mandated statutory tuition rates will be at $50 per semester credit hour (SCH) for undergraduate resident students. Nonresident tuition will be $327 per SCH. Tuition and fee increases for FY2010 will be submitted at the June 23rd 2009 Board of Regents meeting.

Requests for new positions may be included in the material provided to the Provost or President.

All budgets from non-central sources must include projections for revenue. This should be based on historical data with adjustments for new activities in the coming year. Be prepared to explain significant variances from this year’s budget.

Do not budget large amounts in unallocated cost centers. Funds should be allocated within the specific colleges or divisions where they will be used. Prudent contingencies, where appropriate, are allowed but should be justifiable.
The University of Houston
Operating Budget for the Fiscal Year 2010

Budget Guidelines

Positions

All continuing positions should be included in the budget. Dollars budgeted for operating expenses should not normally be converted to positions during the course of the fiscal year. Likewise, positions should not be budgeted with a plan to lapse significant unused funds for other purposes.

It is not normally appropriate to fund continuing positions with temporary or one-time dollars.

Deans and vice presidents are encouraged to lapse unspent salary dollars at regular intervals throughout the year. These lapse funds should be reallocated to areas of the college or division to gain maximum benefit.

A. Positions not Filled

Budget dollars and FTE for positions not filled will be budgeted at the pool (node) level, not individual positions.

B. New Positions

Requests for new positions must be adequately justified and approved by the president. Only new positions approved through this process may be included in the budget.

Benefits

A. E&G Funds (Group 1) (with the exception of HEAF) - Benefits for E&G state cost centers will be budgeted centrally, not at the college/division level.

B. Local Funds and Sponsored Programs (Groups 2-5) – As a general rule, the benefit rate should be 32% of employees salaries. Specific calculations can be made based on benefit rates located in the appendices section.

E&G Fund Budgets

A. Budgeting Prior Year Balances

Unexpended balances in most state cost centers will be carried forward as fund equity at the beginning of the fiscal year. It is necessary for each college or division to budget the portion of this equity which will be necessary to fund the operations of the unit in the new fiscal year.

At the beginning of the fiscal year, carryforward budgets will be adjusted down if budgeted equity amount is greater than the equity balance available at the beginning of the fiscal year. Carryforward dollars should be requested for new program start-up costs, equipment, professional development and other one-time uses. **Carryforward dollars cannot be used to fund core operations or continuing positions.**

B. Premium Tuition

Estimates for Premium Tuition— for the colleges of Law, Optometry, and Pharmacy— will be based on enrollment projections from Enrollment Services. Premium tuition revenue and expenditure is budgeted in the respective colleges during the budget process. **Premium tuition designated fund code is 2160.**
It is the responsibility of the college to monitor the revenue realized in the cost center throughout the year. If necessary, a modification to the premium tuition should be submitted to the budget office in the form of a budget journal so actuals are more closely match to the realized revenue.

**Local Funds Budget**

The total budget, including the number of staff positions and the size of the maintenance and operation budgets, will be based on need, current projected income, and fund balance available at the start of the fiscal year.

A. Fund Equity

Fund equity balances remain in their respective cost centers. Year-end budget balances available (BBA’s) in non-state cost centers are **not** brought forward at the beginning of the fiscal year. It will be necessary to budget the portion of the unbudgeted fund equity if it will be relied upon to fund the operations of the unit.

At the beginning of the fiscal year, carryforward budgets will be adjusted down if budgeted equity amount is greater than the equity balance available at the beginning of the fiscal year.

B. Revenue

Each Designated and Auxiliary Enterprise unit is responsible for providing revenue estimates based on program activity and rate structure. At the end of the fiscal year, actual expenses may not exceed actual revenue plus fund balance. Each college is responsible for monitoring the revenue realized in their cost centers throughout the year. The budgets should be reduced by the department at any point during the year at which the full recognition of the revenue is doubtful.

The use of Technology Fee revenue is split between Information Technology and the academic units. Information Technology provides revenue estimates and expenditure allocations each year. These allocations are communicated through the budget office. The departments are responsible for budgeting their allocated technology fee.

The use of Indirect Cost (IDC) recovery revenues is split between Research and the academic units. Revenue estimates and expenditure allocations are provided each year by Research. These allocations are communicated through the budget office. The departments are responsible for budgeting their allocated IDC.

Estimated endowment income distribution is calculated by Treasury and is located in the appendices section of this book. It is the responsibility of the college/division to budget this investment income from column labeled “Est. FY09 income”.

C. Course-Based Funding (Fees and Differential Designated Tuition)

**Incidental fees, Laboratory fees and Differential Designated Tuition** are estimated by colleges and departments, and budgeted during the budget process by the department. Revenues will be monitored by the budget office, but it is the responsibility of the college or department to adjust revenue and expense budgets in the event that the full estimated amount will not be realized or if additional revenue is generated. These fees are approved by the Board of Regents and are intended to support specific courses or activities. Incidental Fee Revenue must not be combined with revenue from other cost centers.
Reminder - any salaries paid from incidental fees must also have employee benefits budgeted (see benefits section above).

D. Encumbrances

Encumbrances and their budgets, if available, will be carried forward automatically at the beginning of the fiscal year.

E. Utilities

Budget an amount for utility costs based on anticipated usage and rate estimates that reflect the projected utility cost increases.

F. Auxiliary Administrative Charges

The activities classified as auxiliary are self-supporting. As such, the price of goods and services are set at a level to cover ordinary operating expenses.

Auxiliary activities consume certain services that are provided by the administrative areas. Therefore it is appropriate that auxiliary activities share a proportional amount of the administrative costs. This proportional cost is assessed based on actual expenditures less the cost of goods sold. The charge applies to all auxiliary cost centers and is assessed at the end of each month throughout the year.

The FY10 budget should be based on the rate of 3.7 percent (which is a decrease of 0.1% from FY09 budget) with an estimate included in the expenditure budgets for all auxiliary cost centers.

Sponsored Programs

Units supported by these funds are allowed to spend as revenue is recorded. Sponsored Project cost centers are budgeted for the life of the award and do not necessarily coincide with the University fiscal year. Operating units are responsible for cost centers within their areas and will ensure spending within estimated revenue.

The Research Division will assist in estimating the expenditures and balances available for FY10.
The University of Houston  
Operating Budget for the Fiscal year 2010  

Budget Principles  

The development of the Fiscal year 2010 (FY10) operating budget will be based on the following budget principles:

**Planning Driven Budgeting.** The allocation of resources is driven by the priorities and initiatives defined in the planning process.

**Realism.** Recommended budgets for ongoing operations reflect current levels of actual income and expenditures. Budgets should accurately reflect the pool from which the expenditures are expected to occur. Recommended budgets are developed from base budgets with a check on current performance.

**Unbiased Forecasts.** Income projections are maximum likelihood estimates. They reflect neither an upward nor downward bias.

**Full Disclosure.** All revenue sources are budgeted. Prior year balances in support of current year expenditures are budgeted. All sources of funds supporting expenditures are included in budgeted income estimates.

Uses of available funds include all budgeted expenditures and transfers. Expense budgets should be established for those funds that are expected to be used. Conversely, funds cannot be spent or transferred unless they are budgeted.

**Balance.** Budgeted sources of funds available are equal to budgeted uses of funds.

**Prudent Fund Balances.** Prudent and reasonable fund balances remain unbudgeted.

**Year to Year Comparability.** Changes in income and expenditures from one fiscal year to another reflect only substantive changes in funds available and expenditures. Year to year changes in income and expenditures do not result from changes in accounting conventions, organizational changes, creation or consolidation of cost centers, or shifts in income and expenditure classifications.

**Compatibility.** Budget reporting practices and conventions agree with generally accepted accounting principles. Budgeted income and expenditures are reported to correspond with actual income and expenditures.
University of Houston
Merit Increase Guidelines for Staff Employees

General

Should the University receive sufficient appropriations to allow for merit salary increases to staff employees, the following guidelines will be implemented:

To be eligible for a merit increase, the staff employee must be classified as benefits-eligible and have a current staff performance appraisal on file establishing a record of job performance.

Additional merit guidelines and information will be distributed once the criteria have been finalized.

The institution may establish a merit increase budget (pool) based on the availability of funds. Information on the merit pool, if any, will be provided to college and division administrators during the annual budget cycle.

Staff merit increases will be effective September 1.

Definitions

Benefits-eligible staff employee: An employee who is hired to work at least 20 hours per week for a period of at least four and one-half months. Excluded from this definition are students employed in positions that require student status as a condition of employment (both monthly and hourly paid students) and individuals employed in faculty (both teaching and research) positions. Teaching Fellows, Teaching Assistants, Graduate Assistants and Research Assistants are not considered benefits-eligible staff employees.

Merit increase: A pay increase granted in recognition of an employee’s individual performance level and based upon documented performance criteria.

Merit increase budget: The budget amount, determined by the administration that is authorized for merit increases during the budget preparation.

Basic Eligibility Criteria

Individuals must be benefits-eligible staff and must have been hired at least six (6) months prior to the effective date of the merit increase program, or on or before March 1. Non-benefits eligible staff are not eligible to receive a merit increase.

Employees must have a current PCD (within the current fiscal year) on file in Human Resources with a rating of “Generally Meets Expectations,” “Fully Meets Expectations” or “Exceeds Expectations.”
Employees must have completed the mandatory training required for state and federal compliance by the deadline in accordance with SAM 02.A.11.

Employees with current pay rates over their respective pay range maximums are not eligible for merit pay increases to base pay. Likewise, no merit increase will be approved that results in an employee’s new pay rate exceeding the pay range maximum.

Employees who have received a pay adjustment equal to or greater than 15% within six (6) months of the effective date of the merit increase program, on or after March 1, are not eligible to receive a merit increase.

No merit increase will be approved if the employee is indebted to the University under MAPP 5.03.01 Employee Financial Responsibility. Employees who clear their debt within 90 days of the official merit program date (September 1 to December 1), will be eligible for the increase on the first day of the next pay period following the date Human Resources is notified of the payment. This increase will not be retroactive. Employees who do not clear their debt by December 1 will not receive an increase this fiscal year.

Additional merit guidelines and information will be distributed once the criteria have been finalized.

Final merit increase guidelines for staff employees are subject to revision by Human Resources and/or the University President.

Responsibilities

The President, Provost, Vice Presidents, Deans, Chairs, Principal Investigators or Directors may recommend merit increases for benefits-eligible staff employees consistent with these merit increase guidelines.

The Research Division will review individual recommendations for ledger 5 and ledger 1 project accounts to ensure availability of funding that will allow pay adjustment by the sponsoring agency. Research Division approval must be obtained before forwarding recommendations to the Division Vice President for approval.

Following approval by the Division Vice President, Human Resources will review the merit increase recommendations for compliance with merit increase guidelines, and ensure that equity across the university is preserved.

Proposed merit increases should not be communicated to staff employees until all appropriate approvals have been obtained and reviewed by Human Resources.

Questions concerning budget issues should be directed to the Budget Office (Margie Hattenbach 3-0655) or to the appropriate college or division business administrator. Compensation related questions should be directed to the compensation section of Human Resources (Sara Chelette 3-5769).
University of Houston  
Across the Board Increase Guidelines for Staff Employees

General

Should the University receive sufficient appropriations to allow for across the board or cost of living salary increases to staff employees, the following guidelines will be implemented:

To be eligible for an across the board increase, the staff employee must be classified as benefits-eligible and have a current staff performance appraisal on file establishing a record of job performance.

The institution may establish an across the board increase budget (pool) based on the availability of funds. Information on the across the board pool, if any, will be provided to college and division administrators during the annual budget cycle.

Staff across the board increases will be effective September 1.

Definitions

Benefits-eligible staff employee: An employee who is hired to work at least 20 hours per week for a period of at least four and one-half months. Excluded from this definition are students employed in positions that require student status as a condition of employment (both monthly and hourly paid students) and individuals employed in faculty (both teaching and research) positions. Teaching Fellows, Teaching Assistants, Graduate Assistants and Research Assistants are not considered benefits-eligible staff employees.

Across-the-board increase: A certain percentage or amount of pay increase designated to all employees or classifications of employees on the same date.

Basic Eligibility Criteria

Individuals must be continuously employed in a benefits-eligible staff position for at least six (6) months prior to the effective date of the across the board increase, or on or before March 1. Non-benefits eligible staff are not eligible to receive an across the board increase.

Employees must have a current PCD (within the current fiscal year) on file in Human Resources.

No increase will be approved if the employee is indebted to the University under MAPP 5.03.01 Employee Financial Responsibility. Employees who clear their debt within 90 days of the official merit program date (September 1 to December 1), will be eligible for the increase on the first day of the next pay period following the date Human Resources is notified of the payment. This increase will not be retroactive.
Employees who do not clear their debt by December 1 will not receive an increase this fiscal year.

**Responsibilities**

Human Resources will identify the eligible employees and coordinate with the college and division administrators to ensure compliance with the guidelines.

Across the board increases should not be communicated to staff employees until reviewed by Human Resources.

Questions concerning budget issues should be directed to the Budget Office (Margie Hattenbach 3-0655) or to the appropriate college or division business administrator. Compensation related questions should be directed to the compensation section of Human Resources (Sara Chelette 3-5769).
Budget Training
Memorandum

TO: Division/College Administrators
FROM: Martha Tamez
DATE: March 23, 2009
SUBJECT: Training Schedule for Budget Development

BDM data entry and report generating functions are unchanged from FY09 budget development. Therefore training classes are recommended only for those staff who are new to the BDM system operations.

The training manual is currently available on-line at http://www.uh.edu/finance/Departments/Budget/BDM%20Training%20book.doc Print copies for each BDM user to review and take to training.

A list of users attending training with training day preference must be provided and include Name, Empl ID, responsible departments and security level (view or update). Excel spreadsheets or word documents will be accepted. Every effort will be made to accommodate requested training dates. Send list to Martha Tamez at metamez@central.uh.edu by Wednesday, March 25, 2009.

- BDM training will be held at University Business Park, Building 2, lab room 224.
- Morning classes will be from 9:00 – 12:00 and afternoon classes from 1:00-4:00.

BDM Training Schedule

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Training
- Training materials and schedules

Forms
- Budget related forms

FY2009 Plan & Budget
- Executive Plan & Budget

Prior Year Plan & Budget
- Executive Plan & Budget

FY 2009 Planning & Budgeting Guide
- Budget related documents and various references

Prior Year Planning & Budgeting Guide
- Budget related documents and various references

Helpful Hints
- Budget related Hints

Contact List
- Budget Office contacts

Glossary
- Glossary of commonly used budget terms
Training

Budget Development Module

Budget Development Module Overview

Frequently Asked Questions

Budget Module Training Guide

BUDGET

Budget Journal Training

Class Schedule

Last updated on 02/16/06
Comments to: METamez@central.uh.edu
Training:

- Budget Module Overview
  - Budget Inquiry
  - Search by Revenue and Expense
  - Unit Screen
  - Search by Priority
  - Cost Center Summary
  - Position and Funding
  - Job Inquiry
  - Position Maintenance

Last updated on 02/09/06
Comments to: METamez@central.uh.edu
Appendices
University of Houston Mission and Goals

UH Mission
The mission of the University of Houston is to discover and disseminate knowledge through the education of a diverse population of traditional and non-traditional students, and through research, artistic and scholarly endeavors, as it becomes the nation’s premier public university in an urban setting. In this role, the University of Houston applies its expertise to the challenges facing the local, state, national, and international communities, and it establishes and nurtures relationships with community organizations, government agencies, public schools, and the private sector to enhance the educational, economic, and cultural vitality of Houston and Texas.

UH Goals

- **National Competitiveness**
  UH will become a nationally competitive public research university as measured by the Top American Public Research University analysis and/or Carnegie Foundation for the Advancement of Teaching.

- **Student Success**
  UH will have a student profile consistent with a nationally competitive public research university by creating an environment in which student success can be ensured.

- **Community Advancement**
  UH will commit to fulfilling regional and state workforce needs while becoming the primary engine of social, economic, and intellectual development.

- **Athletic Competitiveness**
  UH will provide a comprehensive educational experience to its students and within this context, it will seek to build the strongest athletic program possible.

- **Local and National Recognition**
  UH will be known for its accomplishments locally and nationally.

- **Competitive Resources**
  UH will build a resource base that enables it to accomplish its mission and realize its vision.
## GLOSSARY OF TERMS FOR THE OPERATING BUDGET

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<th>Term</th>
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<tr>
<td>Academic Year</td>
<td>A nine-month period within a fiscal year beginning in September and ending in August and containing the academic sessions held during consecutive Fall and Spring terms.</td>
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<td>Appropriation</td>
<td>Operating and capital outlay funds provided to the University of Houston for a fiscal year as appropriated by the State Legislature and signed by the Governor.</td>
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<td>Approved Positions</td>
<td>The maximum annualized FTE that can be filled during the fiscal year. Positions are approved through the Legislative Appropriation Request process.</td>
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<td>Auxiliary Enterprises</td>
<td>An activity that furnishes a service to students, faculty, or staff and charges a fee directly related to, but not necessarily equal to the cost of the service. They are essential elements in support of the educational program, and conceptually should be regarded as self-supporting.</td>
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</tbody>
</table>
| Budget                        | Original Budget loaded: The original amount of budget approved during the budget development and allocation process.  
                              | Original/Base Budget: The original budget plus or minus any permanent transfers or adjustments.  
<pre><code>                          | Adjustment/Current Budget: The original budget plus or minus any temporary or one-time adjustments. |
</code></pre>
<p>| Budget Development Module     | (BDM) Web-based budgeting tool.                                                                                                           |
| Budget Journal                | The document used to establish or modify the spending authority in a cost center.                                                           |
| Budget Balance Available (BBA)| The amount of budget that has not been spent or is not committed.                                                                          |
| Budget Principles             | The philosophy within which the operating and capital budgets are developed.                                                                |
| Budget Process                | The activity that encompasses the submission of the biennial Legislative Appropriation Request, the Appropriations Act, the allocations of funds at the University level by the President, and the University Operating Budget. Allocations are determined by the university mission, size, organization, economic factors and Texas law. |
| Budgeted                      | Refers to planned level of expenditures, performance, or number of positions for a particular fiscal year.                                 |
| Biennium                      | A two-year period. In Texas, as used in fiscal terms, this is the two-year period beginning on September 1 and ending on August 31 of odd-numbered years, for which general state Appropriations are made. A biennium is identified by the two-fiscal years of which it consists, e.g., 2010-2011 biennium. |
| Capital Budget                | That portion of the budget that is expended for capital construction projects or capital acquisitions.                                      |
| Capital Equipment             | A basic expenditure category represented in the university operating budget, which details the cost of equipment with a life expectancy of more than one year and a cost of $5,000 or more. |
| Cost Center Budget            | The spending authority established for an activity. The budget does not affect fund equity or cash. A cost center may have a budget balance available (BBA) but be considered in deficit, if actual expenditures exceed realized revenue. A BBA is only meaningful if the revenue budget is fully supported by cash in the general ledger. |</p>
<table>
<thead>
<tr>
<th>Term</th>
<th>Definition</th>
</tr>
</thead>
<tbody>
<tr>
<td>Education and General (E&amp;G) Funds</td>
<td>The general activities supported primarily by State Funds to provide services and programs throughout the University, including instructional programs leading to formal degrees, research and public service.</td>
</tr>
<tr>
<td>Encumbrance</td>
<td>A financial transaction which reserves funds for a specific purpose.</td>
</tr>
<tr>
<td>Estimated</td>
<td>Refers to estimated revenues and expenditures for the current fiscal year. Because these numbers are developed later in the fiscal year, they are considered to be more accurate than budgeted numbers.</td>
</tr>
<tr>
<td>Expended</td>
<td>Refers to actual dollars or positions utilized during a completed fiscal year.</td>
</tr>
<tr>
<td>Expenditure</td>
<td>A financial transaction which records the cost of operations.  Adam conspiracy.</td>
</tr>
<tr>
<td>Fiscal Year</td>
<td>A twelve-month period of time beginning in September of one calendar year and ending August 31 of the next calendar year, and specified by the calendar year in which the fiscal year ends, e.g. September 2009 through August 2010 is fiscal year 2010.</td>
</tr>
<tr>
<td>Full Time Equivalent (FTE) Positions</td>
<td>A unit of measure that represents the average number of state personnel working 40 hours a week. A nine-month faculty position (the academic year) is equal to an annual .75 FTE. A University Support Personnel or Administrative and Professional position for twelve months equal is to 1.0 FTE. Includes all faculty positions, full time exempt positions, full time classified positions, and full time hourly and seasonal positions. In addition, it includes those positions which are not full-time regular positions, but are converted to full-time equivalents.</td>
</tr>
<tr>
<td>Term FTE</td>
<td>The Full Time equivalent which should be reported on the Personnel Action Request (PAR) for the duration of the assignment. It is equal to the standard hours per week divided by forty.</td>
</tr>
<tr>
<td>Annualized FTE</td>
<td>Equal to the Term FTE times the duration of the assignment. The duration of the Fall or Spring semester is 4.5 months/12 months which equals 0.375. The duration of the three month summer is 3 months/12 months which equals 0.25. The Annualized FTE is the calculated amount which is reported to the State on a quarterly basis.</td>
</tr>
<tr>
<td>Full Time Equivalent (FTE) Students</td>
<td>A workload measure based on credit hours generated for each term divided by the appropriate undergraduate or graduate divisor. The divisor (one FTE) is equivalent to 15 credit hours at the undergraduate level or to 12 credit hours at the masters level or special professional level, and to 9 credit hours at the doctoral level.</td>
</tr>
<tr>
<td>Fund Equity</td>
<td>The difference between realized revenue and actual expenditures, net of any other fund additions or deductions. The fund equity is not affected by the budget or encumbrances.</td>
</tr>
<tr>
<td>General Revenue Funds</td>
<td>State funds appropriated to the University and which are used for operating funds.</td>
</tr>
<tr>
<td>Higher Education Assistance Funds</td>
<td>Special appropriations for eligible institutions of higher education to be used (HEAF) for acquisition of land, permanent improvements, construction and equipping of buildings, major repair or rehabilitation of buildings, and the acquisition of capital equipment, library books and library material.</td>
</tr>
<tr>
<td>Legislative Appropriation Request (LAR)</td>
<td>The method of submission by each state agency as a biennial budget request to the Legislative Budget Board in the year preceding the convening of the Legislature.</td>
</tr>
<tr>
<td>Legislative Budget Board (LBB)</td>
<td>The Texas Legislative Budget Board (LBB) is a permanent, joint committee of the Texas Legislature that develops recommendations for legislative appropriations for all agencies of state government.</td>
</tr>
</tbody>
</table>
### Local E &G Funds
Dollars collected from students by the University, remitted to the state treasury and then reallocated to the University for expenditures on Education and General activities. Students’ tuition and matriculation fees make up the largest portion of these funds.

### Local Funds / Institutional Funds
Funds that belong to entities of the University that are maintained in local banks rather than the State Treasury. Some student fees, Designated Tuition, time deposits, sales and services make up the largest portion of these funds.

### Maintenance and Operations
A basic expenditure category represented in the university operating budget, which details the cost of postage, telephones, travel, consumable supplies, and non-capital equipment.

### Operating Budget
An expenditure plan developed by a university for each fiscal year. The plan must conform to the annual allocation/appropriation and indicate estimated expenditures for the year by expenditure category.

### Personnel Action Request (PAR)
The form used to initiate an employee change usually resulting in a payroll action.

### Position Request (PR)
The form used to create a new position or change an existing one, frequently resulting in a budget action.

### Project Year
A twelve-month period beginning in the first month a project cost center is established. A project year may not coincide with the university’s fiscal year.

### Recommended Budget
Refers to dollar amount or number of FTE positions recommended by the institution for the subsequent fiscal year.

### Requested
Refers to the dollar amount or number of FTE positions sought by a college or division for use during the subsequent fiscal year.

### Revenue
Financial transaction, which records new funds received by the institution.

### Salaries & Benefits
A basic expenditure category represented in the university operating budget, which details funds to pay faculty and salaried employees.

### Salary Rate
An individual’s total annual rate of pay, excluding benefits.

### Wages
A basic expenditure category represented in the university organizational budget, which details the cost of temporary employment such as Student Assistants, Graduate Assistants, Consultants, and Faculty Adjuncts.

### Workflow
Order in which specific work is performed; in PeopleSoft, a background process that creates a list of administrative actions based on the user's criteria and specifies the procedure associated with each action.

For additional terms and definitions please visit: [http://www.uh.edu/finance/Glossary.htm](http://www.uh.edu/finance/Glossary.htm)
Full-Time Equivalent Analysis and Definitions

Full-Time Positions
With regard to full-time position, FTE should exceed 1.0 only when the additional responsibilities represent a true overload and not simply a reassignment. Chair responsibilities, for example, do not constitute an overload; neither do additional teaching responsibilities or special awards faculty. FTE overloads will be assigned only when a 1.0 FTE employee accepts additional responsibilities in another division.

Part-Time Positions
In general, all FTE will be assigned according to hours worked per week, with 40 hours equal to 1.0 FTE (the state standard). Below are definitions to be followed regarding temporary faculty positions:

Lecturer (Category I)
Lecturers whose responsibilities are primarily instructional are assigned 0.20 FTE per 3 credit hour course (or eight hours per week).

Lecturer (Category II)
Lecturers whose responsibilities include instruction plus additional responsibilities are assigned 0.25 FTE per 3 credit hour course (or 10 hours per week).

Teaching Assistant/Teaching Fellow/Research Assistant
The standard assignment for these positions is 0.5 FTE (for 20 hours per week). This assignment will not be exceeded. The teaching fellows classification must be used for teachers of record.

Faculty Retiree
In accordance with the state’s Voluntary Modification Plan, these positions are assigned 0.49 FTE.

Summer Instruction
Benefits-eligible faculty are assigned 0.5 FTE per 3 credit hour course (or 20 hours per week over a three-month period). Non-benefits-eligible faculty are assigned 0.2 FTE per 3 credit hour course (or eight hours per week over a three-month period).

Summer Research Faculty
Summer research faculty are assigned 1.0 FTE (for 40 hours per week over a three month period).
### University of Houston

#### Standard Work hours per Week for Part-time Faculty

<table>
<thead>
<tr>
<th>Semester Credit Hour Value of Courses Taught</th>
<th>Fall or Spring Semester</th>
<th>Summer (three months)</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Standard Work Hours Per week</td>
<td>Term FTE*</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Lecturer (Category I)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>1</td>
<td>2.7</td>
<td>0.07</td>
</tr>
<tr>
<td>2</td>
<td>5.3</td>
<td>0.13</td>
</tr>
<tr>
<td>3</td>
<td>8.0</td>
<td>0.20</td>
</tr>
<tr>
<td>4</td>
<td>10.7</td>
<td>0.27</td>
</tr>
<tr>
<td>5</td>
<td>13.3</td>
<td>0.33</td>
</tr>
<tr>
<td>6</td>
<td>16.0</td>
<td>0.40</td>
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<tr>
<td>7</td>
<td>18.7</td>
<td>0.47</td>
</tr>
<tr>
<td>8</td>
<td>21.3</td>
<td>0.53</td>
</tr>
<tr>
<td>9</td>
<td>24.0</td>
<td>0.60</td>
</tr>
<tr>
<td>10</td>
<td>26.7</td>
<td>0.67</td>
</tr>
<tr>
<td>11</td>
<td>29.3</td>
<td>0.73</td>
</tr>
<tr>
<td>12</td>
<td>32.0</td>
<td>0.80</td>
</tr>
<tr>
<td>Lecturer (Category II)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>1</td>
<td>3.3</td>
<td>0.08</td>
</tr>
<tr>
<td>2</td>
<td>6.7</td>
<td>0.17</td>
</tr>
<tr>
<td>3</td>
<td>10.0</td>
<td>0.25</td>
</tr>
<tr>
<td>4</td>
<td>13.3</td>
<td>0.33</td>
</tr>
<tr>
<td>5</td>
<td>16.7</td>
<td>0.42</td>
</tr>
<tr>
<td>6</td>
<td>20.0</td>
<td>0.50</td>
</tr>
<tr>
<td>7</td>
<td>23.3</td>
<td>0.58</td>
</tr>
<tr>
<td>8</td>
<td>26.7</td>
<td>0.67</td>
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<tr>
<td>9</td>
<td>30.0</td>
<td>0.75</td>
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<td>10</td>
<td>33.3</td>
<td>0.83</td>
</tr>
<tr>
<td>11</td>
<td>39.7</td>
<td>0.92</td>
</tr>
<tr>
<td>12</td>
<td>40.0</td>
<td>1.00</td>
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<tr>
<td>Regular 9 Month Faculty</td>
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</tr>
<tr>
<td>1</td>
<td>6.7</td>
<td>0.17</td>
</tr>
<tr>
<td>2</td>
<td>13.3</td>
<td>0.33</td>
</tr>
<tr>
<td>3</td>
<td>20.0</td>
<td>0.50</td>
</tr>
<tr>
<td>4</td>
<td>26.7</td>
<td>0.67</td>
</tr>
<tr>
<td>5</td>
<td>33.3</td>
<td>0.83</td>
</tr>
<tr>
<td>6</td>
<td>40.0</td>
<td>1.00</td>
</tr>
<tr>
<td>Lecturer (Category I)</td>
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<td></td>
</tr>
<tr>
<td>2</td>
<td>5.3</td>
<td>0.13</td>
</tr>
<tr>
<td>3</td>
<td>8.0</td>
<td>0.20</td>
</tr>
<tr>
<td>4</td>
<td>10.7</td>
<td>0.27</td>
</tr>
<tr>
<td>5</td>
<td>13.3</td>
<td>0.33</td>
</tr>
<tr>
<td>6</td>
<td>16.0</td>
<td>0.40</td>
</tr>
<tr>
<td>Lecturer (Category II)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>1</td>
<td>3.3</td>
<td>0.08</td>
</tr>
<tr>
<td>2</td>
<td>6.7</td>
<td>0.17</td>
</tr>
<tr>
<td>3</td>
<td>10.0</td>
<td>0.25</td>
</tr>
<tr>
<td>4</td>
<td>13.3</td>
<td>0.33</td>
</tr>
<tr>
<td>5</td>
<td>16.7</td>
<td>0.42</td>
</tr>
<tr>
<td>6</td>
<td>20.0</td>
<td>0.50</td>
</tr>
<tr>
<td>Summer Research Faculty</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>40.0</td>
<td>1.00</td>
</tr>
<tr>
<td></td>
<td>20.0</td>
<td>0.50</td>
</tr>
</tbody>
</table>

*Term FTE is the Full Time Equivalent which should be reported on the personnel Action Request (PAR) for the duration of the assignment. It is equal to the standard hours per week divided by forty.

**The annualized FTE is equal to the Term FTE times the duration of the assignment. The duration of the Fall or Spring semester is 4.5 months/12 months which equals 0.375. The duration of the three month summer is 3 months/12 months which equals 0.25. The Annualized FTE is the calculated amount which is reported to the State on a quarterly basis.
University of Houston
Employer Matching Rate for Estimated Benefit Cost

Fiscal Year 2010 Retirement Plans:

TRS – 6.4% Employer Contribution
ORP – 6.4% Employer Contribution (if hired after 9/1/1995)
ORP – 8.5% Employer Contribution (if hired prior to 9/1/1995)

Fiscal Year 2008 and 2009 Retirement Plans:

TRS – 6.58% Employer Contribution
ORP – 6.58% Employer Contribution (if hired after 9/1/1995)
ORP – 8.5% Employer Contribution (if hired prior to 9/1/1995)

Calendar Year 2009 Wage Base for FICA:

Social Security Tax – 6.2% up to $106,800 maximum wage
Medicare Tax – 1.45% no wage maximum

Calendar Year 2008 Wage Base for FICA:

Social Security Tax – 6.2% up to $102,000 maximum wage
Medicare Tax – 1.45% no wage maximum
### SKIP Health Premium Rates and Contributions
#### Full-Time HealthSelect of Texas
**FY 2010**

<table>
<thead>
<tr>
<th>Coverage</th>
<th>Premium</th>
<th>State Pays</th>
<th>SKIP Pays</th>
<th>Member Pays</th>
</tr>
</thead>
<tbody>
<tr>
<td>Group 1 Member &amp; Child</td>
<td>$680.42</td>
<td>$532.90</td>
<td>$132.52</td>
<td>$15.00</td>
</tr>
<tr>
<td>Group 1 Family</td>
<td>$1,121.06</td>
<td>$753.22</td>
<td>$132.52</td>
<td>$235.32</td>
</tr>
<tr>
<td>Group 2 Member &amp; Child</td>
<td>$680.42</td>
<td>$532.90</td>
<td>$122.52</td>
<td>$25.00</td>
</tr>
<tr>
<td>Group 2 Family</td>
<td>$1,121.06</td>
<td>$753.22</td>
<td>$122.52</td>
<td>$245.32</td>
</tr>
</tbody>
</table>

### SKIP Health Premium Rates and Contributions
#### Part-Time HealthSelect of Texas
**FY2010**

<table>
<thead>
<tr>
<th>Coverage</th>
<th>Premium</th>
<th>State Pays</th>
<th>SKIP Pays</th>
<th>Member Pays</th>
</tr>
</thead>
<tbody>
<tr>
<td>Group 1 Member &amp; Child</td>
<td>$680.42</td>
<td>$266.45</td>
<td>$206.28</td>
<td>$207.69</td>
</tr>
<tr>
<td>Group 1 Family</td>
<td>$1,121.06</td>
<td>$376.61</td>
<td>$206.28</td>
<td>$538.17</td>
</tr>
<tr>
<td>Group 2 Member &amp; Child</td>
<td>$680.42</td>
<td>$266.45</td>
<td>$196.28</td>
<td>$217.69</td>
</tr>
<tr>
<td>Group 2 Family</td>
<td>$1,121.06</td>
<td>$376.61</td>
<td>$196.28</td>
<td>$548.17</td>
</tr>
</tbody>
</table>

### Health Premium Rates with State Contribution for Full-Time Employees
**HealthSelect of Texas – Full Time**
**FY 2010**

<table>
<thead>
<tr>
<th>Coverage</th>
<th>Premium</th>
<th>State Pays</th>
<th>Member Pays</th>
</tr>
</thead>
<tbody>
<tr>
<td>Member Only</td>
<td>$385.38</td>
<td>$385.38</td>
<td>$0.00</td>
</tr>
<tr>
<td>Member &amp; Spouse</td>
<td>$826.02</td>
<td>$605.70</td>
<td>$220.32</td>
</tr>
<tr>
<td>Member &amp; Children</td>
<td>$680.42</td>
<td>$532.90</td>
<td>$147.52</td>
</tr>
<tr>
<td>Family</td>
<td>$1,121.06</td>
<td>$753.22</td>
<td>$367.84</td>
</tr>
</tbody>
</table>

### Health Premium Rates with State Contribution for Part-Time Employees
**HealthSelect of Texas – Part Time**
**FY2010**

<table>
<thead>
<tr>
<th>Coverage</th>
<th>Premium</th>
<th>State Pays</th>
<th>Member Pays</th>
</tr>
</thead>
<tbody>
<tr>
<td>Member Only</td>
<td>$385.38</td>
<td>$192.69</td>
<td>$192.69</td>
</tr>
<tr>
<td>Member &amp; Spouse</td>
<td>$826.02</td>
<td>$302.85</td>
<td>$523.17</td>
</tr>
<tr>
<td>Member &amp; Children</td>
<td>$680.42</td>
<td>$266.45</td>
<td>$413.97</td>
</tr>
<tr>
<td>Family</td>
<td>$1,121.06</td>
<td>$376.61</td>
<td>$744.45</td>
</tr>
</tbody>
</table>
### University of Houston System

#### Non-Health Insurance

**Policy Year 2009**

<table>
<thead>
<tr>
<th>Component</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>Attendant Care Liability</td>
<td>$1,443.07</td>
</tr>
<tr>
<td>Automobile</td>
<td>$101,378.52</td>
</tr>
<tr>
<td>Blanket Accident</td>
<td>$2,840.00</td>
</tr>
<tr>
<td>Bond</td>
<td>$100.00</td>
</tr>
<tr>
<td>Broadcasters / Publishers Liability</td>
<td>$7,102.12</td>
</tr>
<tr>
<td>Business Travel Accident</td>
<td>$21,000.00</td>
</tr>
<tr>
<td>Crime (Systems)</td>
<td>$11,000.00</td>
</tr>
<tr>
<td>Directors &amp; Officers Liability</td>
<td>$187,697.82</td>
</tr>
<tr>
<td>Fee</td>
<td>$145,714.19</td>
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<tr>
<td>Fine Arts</td>
<td>$375.50</td>
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<tr>
<td>Foreign Package</td>
<td>$6,600.00</td>
</tr>
<tr>
<td>General Liability</td>
<td>$26,250.00</td>
</tr>
<tr>
<td>Hull &amp; Protection and Indemnity</td>
<td>$4,425.00</td>
</tr>
<tr>
<td>Intercollegiate Sports - UH</td>
<td>$543,500.00</td>
</tr>
<tr>
<td>Lawyers Professional Liability</td>
<td>$8,510.00</td>
</tr>
<tr>
<td>Medical Professional</td>
<td>$100,000.00</td>
</tr>
<tr>
<td>Special Crime</td>
<td>$4,097.61</td>
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<tr>
<td>Special Events</td>
<td>$72,000.00</td>
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<tr>
<td>Student Professional</td>
<td>$11,100.00</td>
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<tr>
<td>Property Primary</td>
<td>$1,393,854.67</td>
</tr>
<tr>
<td>Property Excess</td>
<td>$129,690.00</td>
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<tr>
<td>NFIP</td>
<td>$257,659.00</td>
</tr>
<tr>
<td>Blanket Accident - Design Build</td>
<td>$200.00</td>
</tr>
<tr>
<td>Outdoor Adventure</td>
<td>$1,726.00</td>
</tr>
</tbody>
</table>

**University of Houston Central Total** $3,038,263.50

<table>
<thead>
<tr>
<th>Component</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>Automobile</td>
<td>$3,665.18</td>
</tr>
<tr>
<td>Crime (Systems)</td>
<td>$100.00</td>
</tr>
<tr>
<td>Directors &amp; Officers Liability</td>
<td>$2,056.06</td>
</tr>
<tr>
<td>Fee</td>
<td>$2,569.86</td>
</tr>
<tr>
<td>Special Crime</td>
<td>$72.27</td>
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<tr>
<td>Property Primary</td>
<td>$49,653.86</td>
</tr>
<tr>
<td>Property Excess</td>
<td>$4,620.00</td>
</tr>
<tr>
<td>NFIP</td>
<td>$34,227.00</td>
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</table>

**University of Houston System Total** $96,964.23
## University of Houston
### Premium Allocation FY09

<table>
<thead>
<tr>
<th>Row Labels</th>
<th>Sum of Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Accident/Sickness - Bio medical</strong></td>
<td>$23,125.00</td>
</tr>
<tr>
<td>Academic Affairs</td>
<td>23,125.00</td>
</tr>
<tr>
<td><strong>Accident-Blanket</strong></td>
<td>$3,499.78</td>
</tr>
<tr>
<td>Architecture</td>
<td>149.63</td>
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<tr>
<td>Campus rec</td>
<td>1,726.00</td>
</tr>
<tr>
<td>Charter School</td>
<td>377.55</td>
</tr>
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<td><strong>Grand Total</strong></td>
<td><strong>$6,903,397.21</strong></td>
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# UNIVERSITY OF HOUSTON SYSTEM ENDOWMENT FUND

**ESTIMATED FY09 INCOME DISTRIBUTION FOR FY2010 BUDGET DEVELOPMENT**

<table>
<thead>
<tr>
<th>UNIVERSITY OF HOUSTON</th>
<th>3 Year Average Market Value</th>
<th>Est. FY09 Income</th>
<th>FY08 Actual Income</th>
<th>FY09-FY08 Income Change</th>
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<tr>
<td>ADMINISTRATION &amp; FINANCE</td>
<td>67,362</td>
<td>2,694</td>
<td>3,366</td>
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<td>72,137,847</td>
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<td>3,598,910</td>
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<td>408,288</td>
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<td>ATHLETICS</td>
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<td>213,956</td>
<td>281,560</td>
<td>(67,604)</td>
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<td>958,839</td>
<td>3,133,443</td>
<td>(2,537,504)</td>
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<td>595,919</td>
<td>3,133,426</td>
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<td>303,496</td>
<td>596,607</td>
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<td>33,157</td>
<td>321,449</td>
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<td>47,374</td>
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<td>168,424</td>
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<td>PHARMACY</td>
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<td>83,233</td>
<td>93,039</td>
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<td>21,843</td>
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<td>22,973</td>
<td>33,893</td>
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<tr>
<th>SYSTEM ADMINISTRATION</th>
<th>3 Year Average Market Value</th>
<th>Est. FY09 Income</th>
<th>FY08 Actual Income</th>
<th>FY09-FY08 Income Change</th>
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<tr>
<td>ACADEMIC AFFAIRS</td>
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### University of Houston System

#### Estimated FY09 Endowment Income

For FY2010 Budget Development

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<th>FY09</th>
<th>FY08</th>
<th>Income Change</th>
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<td>FY08</td>
<td>Actual Income</td>
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<td>Dept</td>
<td>Prog</td>
<td>Value</td>
<td>Income</td>
<td>Change</td>
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| Honors Program Quasi                                                     | 4079 |        | 200,541  | 8,022  |
| Dyer, Everett                                                           | 1658 |        | 82,672   | 3,307  |
| Cooper Industries                                                       | 1415 |        | 89,650   | 3,586  |
| Temple Honors Coll                                                      | 1657 |        | 438,587  | 17,543 |
| Coastal Security - Honors                                               | 4079 |        | 12,908   | 4,713  |
| Hearst, William Randolph                                               | 4079 |        | 30,260   | 15,905 |
| Cizik, Jane Morn Chair                                                  | 3616 |        | 618,706  | 30,915 |
| Honors Fellows                                                          | 4286 |        | 812,460  | 40,596 |
| Carolyn Grant Fay                                                       | 1221 |        | 1,911,154| 90,497 |
| Monsanto End/Honor                                                      | 1656 |        | 15,404   | 616    |
| McMillaun/Gerstacker Sch                                                | 1664 |        | 14,951   | 747    |
| Honors Undergrad Research                                               | 4079 |        | 98,846   | 4,917  |
| Honors Study Abroad End                                                 | 4079 |        | 98,846   | 4,917  |
| Jane Blaffer Owen School End                                            | 1659 |        | 45,612   | 1,942  |

R:\PLANBUDG\Bud10\Planning & Budgeting Guide (Redbook)\26.0 Endowment Income
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**SUBTOTAL HONORS**

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<td>54,112</td>
<td>67,594</td>
<td>(13,482)</td>
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<tr>
<td>Cullen Roy &amp; Lillie</td>
<td></td>
<td></td>
<td></td>
<td>58,279,525</td>
<td>2,331,181</td>
<td>2,912,023</td>
<td>(580,842)</td>
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<tr>
<td>System Core Pool Quasi Endowment</td>
<td></td>
<td></td>
<td></td>
<td>55,281,799</td>
<td></td>
<td>2,067,934</td>
<td>(2,722,546)</td>
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<tr>
<td>TOTAL UHS ALOCATIONS</td>
<td></td>
<td></td>
<td></td>
<td>121,465,921</td>
<td>2,647,365</td>
<td>5,369,911</td>
<td>(2,722,546)</td>
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<tr>
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<td>12542</td>
<td></td>
<td>4023</td>
<td>13,428</td>
<td>*</td>
<td>501</td>
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<tr>
<td>System Matching</td>
<td>10575</td>
<td></td>
<td>4023</td>
<td>3,936,535</td>
<td>*</td>
<td>196,412</td>
<td>(196,412)</td>
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<td>10579</td>
<td></td>
<td>4023</td>
<td>5,762,460</td>
<td>230,498</td>
<td>287,516</td>
<td>(57,018)</td>
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<td>Farfel Lecture</td>
<td>10586</td>
<td></td>
<td>4023</td>
<td>414,478</td>
<td>16,579</td>
<td>20,710</td>
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<td>General Endowment</td>
<td>10589</td>
<td></td>
<td>4023</td>
<td>31,046,638</td>
<td>1,241,866</td>
<td>1,549,000</td>
<td>(307,134)</td>
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<td>Farfel Quasi</td>
<td>10586</td>
<td></td>
<td>4023</td>
<td>92,908</td>
<td>3,716</td>
<td>4,642</td>
<td>(926)</td>
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<td>General Purpose</td>
<td>10050</td>
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<td>4023</td>
<td>1,088,874</td>
<td>43,555</td>
<td>54,329</td>
<td>(10,774)</td>
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<tr>
<td>Dist Service Fellow</td>
<td>10320</td>
<td></td>
<td>4023</td>
<td>264,845</td>
<td>10,594</td>
<td>13,214</td>
<td>(2,620)</td>
</tr>
<tr>
<td>Energy Alumni Assoc. Schol.</td>
<td>10581</td>
<td></td>
<td>4023</td>
<td>127,218</td>
<td>5,089</td>
<td>6,357</td>
<td>(1,268)</td>
</tr>
<tr>
<td>Melrose Thompson</td>
<td>10454</td>
<td></td>
<td>4023</td>
<td>9,816,604</td>
<td>*</td>
<td>475,213</td>
<td>(475,213)</td>
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<td></td>
<td>4023</td>
<td>423,376</td>
<td>*</td>
<td>21,134</td>
<td>(21,134)</td>
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<td>Houston Jr C Of C</td>
<td>10028</td>
<td></td>
<td>4023</td>
<td>238,891</td>
<td>*</td>
<td>12,022</td>
<td>(12,022)</td>
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<td>New Century Success</td>
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<td>4023</td>
<td>37,392</td>
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<td>1,860</td>
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<td>816,639</td>
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<td>40,805</td>
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<td>Subtotal INSTITUTIONAL</td>
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<td></td>
<td>54,080,575</td>
<td>1,551,897</td>
<td>2,683,715</td>
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<td></td>
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<td>176,911,107</td>
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<td>8,121,804</td>
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## UHS Endowment Fund

### Estimated FY09 Allocation of Income Among Beneficiary Accounts

#### For FY2010 Budget Development

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<thead>
<tr>
<th>Account Details</th>
<th>Estimated FY09</th>
<th>Actual FY08</th>
<th>% Change</th>
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<td>5,305.00</td>
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<td>1-0-66118</td>
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<tr>
<td>Werlin, Joseph</td>
<td>00730-6065-H0650-H9030-NA</td>
<td>00730-4028-H0126-H1695-NA 16522</td>
<td>500.00</td>
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<td></td>
<td>00730-4042-H0126-D1501-NA 12200</td>
<td>3,809.00</td>
<td>4,805.00</td>
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<td><strong>Total</strong></td>
<td>4,309.00</td>
<td>5,305.00</td>
<td>-18.8%</td>
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<tr>
<td>1-0-66125</td>
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<td>Prudential</td>
<td>00730-6051-H0650-H9037-NA</td>
<td>00730-4028-H0485-H1012-NA 40169</td>
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<tr>
<td></td>
<td>00730-4028-H0041-H1026-NA 16896</td>
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<td>2,068.00</td>
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<td>00730-4028-H0086-H1028-NA 16897</td>
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<td>2,068.00</td>
</tr>
<tr>
<td></td>
<td>00730-4042-H0013-C0459-NA 17523</td>
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<td>2,068.00</td>
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<td><strong>Total</strong></td>
<td>8,272.00</td>
<td>10,333.00</td>
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<tr>
<td>1-0-66603</td>
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<tr>
<td>Gordon, Aron</td>
<td>00730-6045-H0650-P9004-NA</td>
<td>00730-4028-H0041-H1072-NA 13063</td>
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<tr>
<td></td>
<td>00730-4028-H0090-H1232-NA 16671</td>
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<td><strong>Total</strong></td>
<td>11,596.00</td>
<td>14,485.00</td>
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<tr>
<td>1-0-66671</td>
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<tr>
<td>Melcher, Leroy &amp; Lucille</td>
<td>00730-6045-H0650-H9088-NA</td>
<td>00730-4028-H0041-A1418-NA 12322</td>
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<tr>
<td></td>
<td>00730-4028-H0041-A1416-NA 17672</td>
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<td>00730-4028-H0041-H0572-NA 17144</td>
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<td><strong>Total</strong></td>
<td>325,192.00</td>
<td>406,218.00</td>
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<td>1-0-66908</td>
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<tr>
<td>Bohner, Roswell</td>
<td>00730-6045-H0650-H9199-NA</td>
<td>00730-4028-H0213-H1614-NA 16365</td>
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<td></td>
<td>00730-4028-H0224-E9199-NA 42569</td>
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<td>704.50</td>
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<td><strong>Total</strong></td>
<td>1,409.00</td>
<td>1,760.00</td>
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<td>Moores Univ Priority</td>
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<td>Income</td>
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<td>00730-6062-H0650-P9023-NA 20832</td>
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<td>1,211,003.00</td>
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<td><strong>Total</strong></td>
<td>-</td>
<td>2,308,000.00</td>
<td>-100.0%</td>
</tr>
<tr>
<td>1-0-66944</td>
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<td></td>
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</tr>
<tr>
<td>Doss, R.P.</td>
<td>00730-6045-H0650-H9219-NA</td>
<td>00730-4028-H0066-H1162-NA 16676</td>
<td>50%</td>
</tr>
<tr>
<td></td>
<td>00730-4028-H0136-H1508-NA 16654</td>
<td>50%</td>
<td>848.00</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td>1,696.00</td>
<td>2,070.00</td>
<td>-18.1%</td>
</tr>
<tr>
<td>1-0-67265</td>
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<tr>
<td>Dodds Family</td>
<td>00730-6045-H0650-H9392-NA</td>
<td>00730-4028-H0058-H2397-NA 16609</td>
<td>48%</td>
</tr>
<tr>
<td></td>
<td>00730-4027-H0109-H2616-NA 31308</td>
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<td>-</td>
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<tr>
<td></td>
<td>00730-4042-H0058-D3113-NA 40869</td>
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<tr>
<td><strong>Total</strong></td>
<td>-</td>
<td>5,245.00</td>
<td>-100.0%</td>
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University of Houston System  
Estimated FY09 System Endowment Income Distribution Among Campuses  
For FY2010 Budget Development  

<table>
<thead>
<tr>
<th>FY09 distribution based on 4.0% payout</th>
<th>Autrey (1)</th>
<th>Cullen L'ship</th>
<th>Cullinan (2)</th>
<th>Int'l Paper (3)</th>
<th>Mitchell (4)</th>
<th>R&amp;L Cullen (5)</th>
<th>Core Pool (6)</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Distribution</td>
<td>21,919.00</td>
<td>54,112.00</td>
<td>18,430.00</td>
<td>19,279.00</td>
<td>202,444.00</td>
<td>2,331,181.00</td>
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<td></td>
</tr>
<tr>
<td>UH</td>
<td>12,786.08</td>
<td>32,992.09</td>
<td>11,236.77</td>
<td>16,384.28</td>
<td>40,000.00</td>
<td>2,098,062.90</td>
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<tr>
<td>UHCL</td>
<td>3,653.17</td>
<td>6,996.68</td>
<td>2,383.00</td>
<td>2,045.29</td>
<td></td>
<td>-</td>
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<td>-</td>
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<tr>
<td>UHD</td>
<td>3,653.17</td>
<td>11,222.83</td>
<td>3,822.38</td>
<td></td>
<td>-</td>
<td>233,118.10</td>
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<td>-</td>
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<tr>
<td>UHS</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>UHV</td>
<td>1,826.58</td>
<td>2,900.40</td>
<td>987.85</td>
<td>35,000.00</td>
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<td>-</td>
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<tr>
<td>System Total</td>
<td>21,919.00</td>
<td>54,112.00</td>
<td>18,430.00</td>
<td>19,279.00</td>
<td>75,000.00</td>
<td>2,331,181.00</td>
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</tbody>
</table>

Notes: basis for distribution:

(1) Autrey: UH - 7/12, UHCL - 2/12, UHD - 2/12, UHV - 1/12  
(2) Cullinan and Cullen Leadership Endowments are to be based on proportion of total headcount enrollment  
Headcount Enrollment September 2008  

<table>
<thead>
<tr>
<th>Total</th>
<th>% of System</th>
<th>% of Total</th>
<th>Total from</th>
<th>% of System</th>
</tr>
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<tbody>
<tr>
<td>Headcount</td>
<td></td>
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<td>From Texas</td>
<td>Texas</td>
</tr>
<tr>
<td>UH</td>
<td>36,104</td>
<td>60.97%</td>
<td>60.00%</td>
<td>21,661</td>
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<tr>
<td>UHCL</td>
<td>7,658</td>
<td>12.93%</td>
<td>12.30%</td>
<td>942</td>
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<tr>
<td>UHD</td>
<td>12,283</td>
<td>20.74%</td>
<td>22.02%</td>
<td>2,704</td>
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<tr>
<td>UHV</td>
<td>3,174</td>
<td>5.36%</td>
<td>5.69%</td>
<td>181</td>
</tr>
<tr>
<td>System Total</td>
<td>59,219</td>
<td>100.00%</td>
<td>100.00%</td>
<td>25,488</td>
</tr>
</tbody>
</table>

(3) International Paper Endowment are to be based on proportion of total Texas resident enrollment  
(4) Mitchell Endowment is to be distributed to UH and UHV per the amount indicated in the endowment agreement. The remaining balance is to be distributed at the Chancellor’s discretion.  
(5) Roy & Lillie Cullen 00783-6061-S0651-F9100-NA 4-0-66843 Total 2,331,181.00  
From: 00783-4040-S0015-D0205-NA 12398 to:  
| UH    | 00730-4040-H0005-F0751-NA 34244 | 89.1% | 2,077,082.27 |
|       | 00730-5022-H0089-A0001-G004545-10609 | 0.9% | 20,980.63 |
|       |                                          | 90.0% | 2,098,062.90 |
| UHD   | 00784-4040-D0004-D0422-NA 13983 | 10.0% | 233,118.10 |
|       |                                          | 100.0% | 2,331,181.00 |

(6) System Core Pool Quasi End. 00783-6065-S0651-F9968-NA Total -  
From: 00783-2077-S0027-F3481-NA 12839 to:  
| UH    | 00730-2077-H0264-F3681-NA 43693 | 67.2% | - |
|       | 00759-2077-C0069-F0725-NA 10637 | 11.7% | - |
| UHD   | 00784-2077-D0036-F0482-NA 10570 | 10.4% | - |
| UHS   | 00783-2077-S0027-F3480-NA 12840 | 7.3% | - |
| UHV   | 00765-2077-V0010-F0938-NA 12177 | 3.5% | - |
# University of Houston Division of Academic Affairs
## FY2010 Technology Fee Allocations

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<thead>
<tr>
<th>College / Division</th>
<th>Computer Use Fee</th>
<th>Distributed Support</th>
<th>Other Non-College</th>
<th>Total Allocations</th>
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<td>22,500</td>
<td>726,166</td>
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<td>748,666</td>
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<td>Academic Technology Support Center</td>
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<td>-</td>
<td>844,413</td>
<td>844,413</td>
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<tr>
<td>Architecture</td>
<td>33,849</td>
<td>45,877</td>
<td>-</td>
<td>79,726</td>
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<td>Business Administration</td>
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<td>157,924</td>
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<td>418,657</td>
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<td>Education</td>
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<td>150,472</td>
<td>-</td>
<td>300,646</td>
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<td>Educational Technology and University Outreach</td>
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<td>-</td>
<td>271,115</td>
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<td>Engineering</td>
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<td>Honors</td>
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<td>161,061</td>
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<td>52,636</td>
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<td>Liberal Arts &amp; Sciences</td>
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<td>397,752</td>
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<td>877,236</td>
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<td>Library</td>
<td>492,694</td>
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<td>492,694</td>
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<td>NSM</td>
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<td>499,342</td>
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<td>762,081</td>
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<td>Pharmacy</td>
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<td>Student Affairs</td>
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<td>329,046</td>
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<td>TcSAM</td>
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<td>56,641</td>
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<tr>
<td><strong>Total</strong></td>
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<td><strong>$3,460,126</strong></td>
<td><strong>$4,561,801</strong></td>
<td><strong>$11,610,682</strong></td>
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### FY 2010 Projected Expenditures by Revenue Source

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<th></th>
<th>FY 2008 Actual</th>
<th>FY 2009 Budget</th>
<th>FY 2010 Budget</th>
<th>FY 2010 inc./decrease</th>
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<td>$42,000,000</td>
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<td>State</td>
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<td>$8,500,000</td>
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<tr>
<td>Local</td>
<td>$799,019</td>
<td>$900,000</td>
<td>$350,000</td>
<td>($550,000)</td>
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<td>Private</td>
<td>$12,833,516</td>
<td>$14,000,000</td>
<td>$16,000,000</td>
<td>$2,000,000</td>
</tr>
<tr>
<td>Other</td>
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<td><strong>$79,049,326</strong></td>
<td><strong>$75,900,000</strong></td>
<td><strong>$88,350,000</strong></td>
<td><strong>$12,450,000</strong></td>
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<td><strong>$400,000</strong></td>
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<tr>
<td><strong>Total Sponsored Project Expenditures</strong></td>
<td><strong>$79,875,972</strong></td>
<td><strong>$76,300,000</strong></td>
<td><strong>$89,000,000</strong></td>
<td><strong>$12,700,000</strong></td>
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### FY 2010 Projected Expenditures by College/Division

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# Indirect Cost Return – Estimated FY 2010 Returns

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<td><strong>TOTAL IDC RECOVERY</strong></td>
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# University of Houston

## Table 7 - Allocation of Student Service Fees

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<td>$565,678</td>
<td>3.9%</td>
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* Formerly "Urban Experience Program – Ctr. Mexican-American Studies
UNIVERSITY OF HOUSTON
FY2010 Plan and Budget

Contact List

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<th>Name, Position Title</th>
<th>Extension</th>
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