

Annual Resource Planning Process Tips and Q&A

The following Tips and Q&A are provided to guide Units during the completion of their Three Year Plan Unit Profiles.

ICR TAB

- The 14/15 RF expenditures and ICR data (through December) are now available in SIRI on the Research Expenditures dashboard. Also, the following enhancements have been made:
 - All PIs with or without ICR are reported
 - The 12% Unit Return is calculated and available for reporting
 - Funding Source has been added to the ICR reports
- UBF data for 14/15 is not yet available.
- The new algorithm is now in place for 14/15 numbers, whereby credit for centers stays in the centers.

SALARY INCREASES TAB

- A new report on UUP salary increases has been added to the Resource Planning dashboard.

ENROLLMENT and TUITION REVENUE TABS

- A snapshot of Spring 2015 enrollment and tuition revenue is now available in the tuition revenue table in InfoSource, dated 1/18/15. For planning purposes, Units can compare this snapshot to the data that was provided in the Unit Profile and update the charts, if necessary. To run queries against the tuition revenue table, use the “Toolkit” Mark Molnar previously provided; to run Fall 2014, the latest snapshot is dated 9/12/14. If you have questions, please contact Lynne DePasquale.

ADJUNCT FACULTY TAB

- Projections of 2014/15 adjunct expenditures have been updated in the SIRI Resource Planning dashboard. Units may wish to compare these new projections with what was previously provided in their Unit Profile and update the chart, if necessary.

RESEARCH EXPENDITURES TAB

Q&A:

(Q) What if I prefer to correlate Research Expenditures to my Gross ICR out year projections rather than utilizing the ICR growth rate as a projection tool? Can I use an alternate method?

(A) The Gross ICR projection amounts (2014-15 thru 2017-18) are calculated using the actual Gross ICR growth rate from 2012-13 to 2013-14. Therefore, the assumption for out year projections is that your Unit's Gross ICR will continue to grow at a similar rate as it has historically. However, if you feel you can more accurately project your Unit's Gross ICR with a different method more suitable to your Unit and/or grant, please do so and indicate the method used on your ICR tab.

ENROLLMENT - HEADCOUNT TAB

- The planned headcount enrollment for 2015/16 and beyond is currently set to 2014/15 levels. To be consistent with the credit hour enrollment projection methodology, these values should equal 2013/14 levels instead. Thus, units whose credit hour enrollment is projected to remain at 2013/14 levels and who do not plan to make changes to the Enrollment-Headcount projections (2015/16 and beyond) should set the values equal to 2013/14 levels. Please contact your Resource Analyst if you have questions or would like more information.

ENROLLMENT - CREDIT HOURS TAB

- Due to improved data, more accurate figures for historical credit hours (prior to 2013/14) are available for some Units. The variances from the figures that were provided in the original 2015/16 Unit Profiles and the updated figures are very small. However, to ensure the Unit Profiles that will be used during the budget hearings reflect the most updated data, your Resource Analyst will make these revisions to your Unit Profile submission after January 30 and notify you of the change. Please contact your Resource Analyst if you have questions or would like more information.

CAPITAL / SPACE TAB

Q&A:

(Q) Should I list only those projects that would require University funding?

(A) Units should include all Capital and Space projects that are planned or in progress, regardless of funding source. If University funding is requested, the project should also be included on the Investment Proposals tab of the Unit Profile.

(Q) Do we need to list the rehab requests our Unit already submitted to the Capital Planning Group in December?

(A) Yes, include any Capital and Space projects that are planned or in progress in order to provide a comprehensive view of your Unit's current Capital and Space initiatives.

ALL FEES TAB

Q&A:

(Q) May I still submit new fees and propose new rates to existing fees even though the October 15 deadline has passed?

(A) Yes. Though we are technically past the original deadline, Financial Services is offering some leeway this year considering this is the first time we are incorporating fees into the Resource Planning process.

To propose new fees, list them in the “New Proposed Fees” section and submit the paperwork to Financial Services as soon as possible.

To propose new rates for existing fees, fill in columns E,F and G and submit the paperwork to Financial Services as soon as possible.

Note: The next time the Three Year Plan process is conducted, the Resource Planning and Fees calendars will be more closely aligned.

(Q) What value should I use for “2015-16 Projected Revenue” (column I) for my unit’s Comprehensive Fee since we do not know what this amount will be yet?

(A) Use the 2015-16 Comprehensive Fee Revenue value from the “5 Yr Plan” tab, less the GUSF assessment.

TIPS:

- For “2015-16 Projected Revenue” (column I), use net fee revenue (gross revenue less GUSF).
- Complete the “Fee Proposal Submitted” column only if you are proposing new rates to existing fees.
- Use the “Billing” section, “SUNY Approval Required” and “Effective Date” columns for new proposed fees only. If you are unsure if SUNY approval is required, leave the cell blank.
- In column AA, provide any revisions to the Account Numbers that are listed or provide the correct account number if one is not listed. Ignore the “additional account number” wording as it is not applicable.