MEMO TO: State and IFR Account Managers  
FROM: Clark M. Foster, Budget Officer  
CC: John A. Ettling, President  
John R. Homburger, Vice-President Business Affairs  
Robert E. Golden, Provost and Vice-President for Academic Affairs  
William D. Laundry, Interim Vice-President for Student Affairs  
E. Thomas Moran, Interim Vice-President for Institutional Advancement  
DATE: February 24, 2006  
SUBJECT: 2006-07 Budget Call Letter  

My how time flies! It is time once again to begin our budget process for another year, 2006-07. We have made great strides in recent years creating an inclusive budget process. We are committed to continuing this trend by asking you to focus on the following as you prepare your requests this year.

- Elimination of $1.3 Million structural budget deficit in our state operating budget
- Re-Defining our base budget by providing detail of each department’s total budget request
- Review - Critically question and review budget request detail at each level – Dean/Dir, VP, President’s Council
- Adherence to 2006-07 Budget Completion Schedule
- Preserve Quality – programs and service

We do anticipate a better budget this year based on what we’re hearing from System Administration. However, we still need to eliminate our structural deficit and ask that you examine your core operating budgets carefully. Some increases will still be necessary however, as you will see when you review the 2006-07 budget factors below.

Each department should review its core-operating budget to determine the basic level of support (allocation) required to cover essential departmental operating needs for a full 12-month academic/fiscal year. Additionally, each division and department has had the opportunity to request additional resources that are strategically aligned with the major goals/themes through the strategic planning process. These will be identified, reviewed and presented at the May Planning Days as the highest strategic priorities for the next fiscal year.

The campus will continue to focus investments in our future to ensure that our budget reflects campus strategic planning priorities. Our planning documents – Campus Strategic Plan, Strategic Initiatives, Memorandum of Understanding (2005-2010), and the recently developed Comprehensive Enrollment Management Plan – as well as our forward-looking academic plan, will help guide our decisions and keep the campus focused on priorities to ensure a strong future.

The following information will assist you in preparing your 2006-07 account budget requests. Thank you in advance for your cooperation and please contact me should you have questions, concerns or comments.
2006-07 Budget Preparation Information

Budget Completion Schedule

Feb 24, 2006  Budget Call Letter and materials directed to VPs, Deans, and Departments

March 10, 2006  Department budget request completed on Banner or IFR worksheets and sent to Deans or Directors

March 24, 2006  Deans / Directors complete review of department and IFR budget requests. Forward to VPs/Provost

April 7, 2006  VPs / Divisional budget committee completes review of budget request and submits to President’s Cabinet

April 21, 2006  Budget review with Resources and Planning Committee

May 1, 2006  President’s Cabinet completes review of overall budget request. Prioritizes contingencies & strategic planning proposals for funding.

May 10, 2006  President completes review & approval of budget

May 15, 2006  May Planning Days, Report on 06/07 Budget Status

June 9, 2006  Vice-Presidents inform departments of approved budgets

State Operating Accounts

Just like last year, we are using BANNER to collect your “State” account budget request detail. The biggest change from last year concerns the level of detail. Last year we asked departments to explain any changes using the “justification” field. This year, in order to “Re-Set the Base”, we are asking you to provide the detail supporting your entire budget request. However, PSR detail will be handled as follows:

PSR - Academic departments, reporting to Provost or Deans

PSR detail will be coordinated between Associate Vice-President for Academic Affairs and the Budget office. The basis for these changes comes from the Academic Affairs recruitment plan. The Budget office will update PSR detail on BANNER.

PSR - Business Affairs, Institutional Advancement & Student Affairs departments

The Budget office will pre-post PSR information to these accounts. Departments requesting new positions or eliminating positions should enter these changes along with an explanation directly on BANNER.

Many of you have your detail information already, but it’s in spreadsheets, word documents or other forms. Having this detail in BANNER will allow us to have documented history in future years and will also provide better detail for critical review. Using BANNER - Remember “GYOBUDG” is the key! If you need more help than this, then follow the instructions below to get instructions from the Budget Office webpage.
Income Fund Reimbursable (IFR) Accounts
For IFR accounts, revenue, expenditures, overhead charges, fringe benefit charges and cash transfers must be taken into consideration, as these accounts must generate sufficient revenue to cover all operational costs and transfers.

A budget worksheet has been specifically prepared for each IFR account. Additional or blank copies can be requested by contacting the budget office. The worksheet includes organizational information on the top of the first page. Please review this information and correct as necessary. Prior year (2005-06) approved budget amounts; applicable overhead and fringe benefit rates are also provided on the worksheet. If the account had salary (PSR) expenditures in fiscal year 2005-06, you will receive a comparative sheet showing the Budget Office’s most current 2006-07 information. If the account had Temporary Service expenditures in 2005-06, you will receive a year-to-date listing of these expenditures, grouped as follows: “Instructional”, “Non-Instructional”, and/or “Graduate”. Salary factors for 2006-07 are included later for your reference.

After estimating your revenues, expenses and cash transfers, you may find your revenue and cash balance do not cover your anticipated costs. If this is the case, you may need to request an increase in a fee or alter your expenditure budget. If a change in a fee or service is requested, please complete the “Authorization to Establish or Revise a Fee” form, which you can find in our IFR instructions on our Budget Web page, and submit it with your completed budget packet. If your IFR is currently in a significant cash deficit situation, please submit a plan to permanently eliminate the deficit with your completed budget packet. The plan should eliminate the deficit as soon as reasonably possible (1 – 3 years) and may include a combination of revenue increases and expenditure reductions.

2006-07 Budget Factors

1. Use SUNY’s Web tool “SMRT” to view current and prior year IFR revenue & expense activity.

2. 2006-07 Contractual salary increases:  
   (For IFR Budget Planning)
   
   UUP: Professional titles – 3% effective 1st day of payroll period closest to 7/1/06
   Academic titles – 3% effective 1st day of payroll period closest to 9/1/06
   Discretionary pool – 1%, effective respectively as indicated above

   CSEA: $800 base increase effective 4/1/07 (Full Time employees)

   Council 82 (Security Unit Employees): Agreement not reached since 3/31/03

   GSEU (Graduate Student Employee Union):
   3% increase effective 10/1/06
   $500 stipend increase effective 4/1/07 (Full assistanceship)
   $250 stipend increase effective 4/1/07 (Less than full assistanceship)
   To be eligible for 4/1/07 stipend increase, students must be on payroll as of 4/1/07 and employed for Fall 2006 semester

3. Change in the minimum hourly pay rate. The state minimum hourly rate changed to $6.75 per hour as of 1/1/06 and will be $7.15 per hour as of 1/1/07. This primarily applies to student employees and hourly employees.

4. The 2006-07 Estimated Fringe Benefit rate for non-student payroll is 45.82%

5. Postage rates increased approximately 5.4% effective January 2006
6. Automotive rate increase for use of vans as follows:
   - Increase from 20 cents per mile to 50 cents per mile
   - Minimum charge is $10.00 per day

7. Fall 2006 Targeted student enrollment headcount is as follows:

<table>
<thead>
<tr>
<th>Student</th>
<th>Fall 2006 Headcount - Planned Enrollment</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Undergraduate Students</td>
<td>Graduate Students</td>
</tr>
<tr>
<td></td>
<td>Resident</td>
<td>Non Resident</td>
</tr>
<tr>
<td>Full Time</td>
<td>4,466</td>
<td>527</td>
</tr>
<tr>
<td>Part Time</td>
<td>360</td>
<td>15</td>
</tr>
<tr>
<td>Total</td>
<td>4,826</td>
<td>542</td>
</tr>
</tbody>
</table>

8. Please be aware of our campus planning documents; Strategic Plan, Enrollment Management Plan and Mission Review (MOUII) - when preparing this year’s budget request.

9. Please review all totals and calculated fields for mathematical accuracy.

Detailed instructions for completing your State or IFR budget request can be found on the Budget Office website as follows:
- [www.plattsburgh.edu](http://www.plattsburgh.edu)
- Under “Learn About” on the left hand side of the website, select “Offices and Services”
- Scroll down under Business Affairs and select “Budget Office”
- Under “Budget Office” on the left hand side, select “Budget Instructions”
- Scroll down and select the instructions you need:
  1. State: select “Download Instructions for State Accounts using BANNER”
  2. IFR: select “Download Instructions for “IFR” Budget Preparation Package”

The Budget Office will periodically email informational updates and reminders on approaching deadlines as necessary. Your cooperation is sincerely appreciated! If you need additional assistance, please contact Clark Foster (#3601) in the Budget Office.