

Updating the Integrated Planning Templates

January 31, 2008

Introduction:

As part of the annual Integrated Planning cycle, submission of updated resource plans is required. The initial plans for FTE's and financial resources were submitted on excel-based "templates" last year. (Space and enrolment FTE templates remain to be developed). We are requesting that you update your plans in the same format for the fixed period 2006/2007 to 2010/2011 (for the years 2006/2007 and 2007/2008 actual budgets will be submitted).

The main purpose of these templates is to capture your plans for the CPCI (contribution to personnel cost increases) and to indicate the impact of major multi-year planning assumptions for key resources in your college/division.

For detailed instructions on completing the template, please refer to the original guideline [An Introduction to Integrated Planning Templates](#) dated November 24, 2006 (basic template design and functionality have not changed).

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For 2008/2009, the [Integrated Planning Template](#) has been revised slightly to accommodate the updating of the final three years (08/09 to 10/11) of the current five year planning cycle. The 06/07 and 07/08 columns are for the reporting of those year's actual base budgets (see figure #1). They need to be populated from the FRS report "Int Planning FTE and Budget"

FRS menu path: "Budget/Summary/Int Planning FTE and Budget"

The report will need to be run separately for both the 2006/2007 period for the first column and for the Current Year period for the second column.

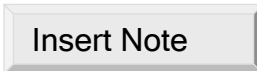
The input tabs in the template are the same as prior years except that they include three remaining years of the Integrated Plan (08/09, 09/10, 10/11). The CPCI tab again will be for the details of how you will be incorporating the 2% contribution to personnel cost increases into your base budget. The amount for your college or division has been sent to you separately.

The details recorded on the input tabs are accumulated with the 07/08 Base Budget column across the Projection years on the Summary tab. The 06/07 Base Budget in column #1 on the Summary tab is the baseline year for this five year integrated plan and is included for comparative purposes.

A high priority again is being placed on the inclusion of detailed notes to document the planning assumptions made in preparing the templates. These are integral to communicating the impact of decisions made as part of the Integrated

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Planning process. Notes are added to the template through the use of the “Insert Note” button available to the right of every row in the template.



If you have questions about using the template, please contact the Budget office, Keith Nakatsu or (knakatsu@uoguelph.ca , extension #52833) or Allyson Biro in the Budget Office (abiro@uoguelph.ca, Ext. #52044).

The completed and approved templates should be forwarded to the Budget Office, to Allyson’s attention by March 21 2008.

(Figure #1 - Template Summary)

Line #	Expenditure (Exp): All Functions (in thousands of dollars)	Column #1	Column #2	Column #3	Column #4	Column #5
		06/07 Base Exp	07/08 Base Exp	PROJECTIONS		
				08/09	09/10	10/11
	PERSONNEL					
19	Regular Full-time (RFT) Faculty			0	0	0
20	Full-time Academic, Contractually Limited Faculty			0	0	0
21	<i>Sub-total Full-time Academic</i>	0	0	0	0	0
22	Part-time Academic, Sessional appts			0	0	0
23	Part-time Academic, Graduate Assistants			0	0	0
24	Part-time Academic, Other			0	0	0
25	<i>Sub-total Part-time Academic</i>	0	0	0	0	0
26	<i>Sub-total Academic Full-time + Part-time</i>	0	0	0	0	0
27	RFT Admin, Acad. Admin Staff			0	0	0
28	RFT Technical (teaching and research support)			0	0	0
29	<i>Sub-total Full-time Non-academic</i>	0	0	0	0	0
30	Part-time/Temporary Admin, Acad. Admin Staff			0	0	0
31	Part-time/Temporary Technical (teaching + research support)			0	0	0
32	<i>Sub-total Part-time (non-academic)</i>	0	0	0	0	0
33	<i>Sub-total Full-time + Part-time (non-academic)</i>	0	0	0	0	0
34	Total All - Salaries	0	0	0	0	0
35	Benefits			0	0	0
36	Total All Personnel	0	0	0	0	0
	NON-PERSONNEL					
37	Operating			0	0	0
38	Equipment			0	0	0
39	Internal Recoveries			0	0	0
40	<i>Sub-Total Non-Personnel Expenses</i>	0	0	0	0	0
41	Total All Expenses	0	0	0	0	0
42	LESS: External Support (Revenues and Recoveries)			0	0	0
43	LESS: Internal Support (Interfund Transfers - Recoveries)			0	0	0
44	Total Net Allocation	0	0	0	0	0

NOTES