



Stony Brook University

Budget, Financial Planning & Analysis Office  
401 Administration  
Stony Brook, NY 11794-1002

TEL: 631.632.6090  
FAX: 631.632.7919

## MEMO

Date: January 19, 2022

To: Vice Presidents  
Vice President Budget Coordinators

From: Heather Montague, Interim Associate Vice President for Financial Planning & Analysis

RE: **Budget Call Letter, Fiscal Year 2022/23**

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As we approach our second year working towards an all-funds, multi-year, integrated planning process, I'd like to highlight the progress we've made in a short period of time, and recognize all of your efforts that have brought us to this point. Over a few short months, we have defined what an [all-funds](#) budget is, and have begun incorporating non-state funding sources into our budget planning process. We created [organizational structures](#) for review and approval of processes, policies, and allocation requests, all with the goal of creating accountability, transparency, and equity among units. Using the tools we've established, we have created a process for reviewing and approving strategic hiring plans, and established [vacancy guidelines](#) that empower our vice-presidential areas to manage hiring activities within their own budget. We have established a university-wide [timeline](#) for budget planning and management that allows the data entry work in the Campus Budget Module (CBM) to follow our strategic discussions. And in a time of constrained resources, this collaborative approach has provided us with opportunities for strategic investment in our [faculty, our staff, and our students](#). We are grateful to all of you for your input and guidance as we continue to build and refine this process.

Attached, we outline expectations and assumptions that will be used in our FY 2022/23 planning cycle. You'll note that we'll be adding both an all-funds, multi-year planning and quarterly budget meetings to our process this year.

# Budget, Financial Planning & Analysis Office

FY 2022/23 BUDGET GUIDANCE

January 19, 2022

## BUDGET TARGETS:

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**State Targets:** State targets will be distributed to VPCs in early March.

**Strategic Budget Initiative:** For areas receiving funding through the Strategic Budget Initiative, you will be required to submit budget allocation and expenses in SBI-specific accounts that you have created.

## DEADLINES:

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**Campus Budget Module (CBM):** CBM will open on March 1, 2022. Vice Presidential areas can delegate their own calendars within their respective units. CBM will close **Friday, April 29, 2022 at 5:00 pm**. Once your VP area has completed CBM, please contact the Budget, Financial Planning and Analysis Office at [david.ferer@stonybrook.edu](mailto:david.ferer@stonybrook.edu).

**Strategic Hiring Plans (SHP):** SHPs are due one week in advance of your scheduled presentations. Presentations will begin in mid-May. Further details will be provided in the coming weeks. Documents should be sent to BFP&A at [david.ferer@stonybrook.edu](mailto:david.ferer@stonybrook.edu). *Please make sure these presentations are final, as they will be distributed to Senior Leadership at that time.*

## ASSUMPTIONS:

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**State Operating Aid:** We assume the State Operating Aid will remain flat for 22/23.

**CSIs:** Units should budget for 3% increases in the out-years for contractual salary increases. Units are obligated to cover increased CSI costs within their current allocation.

**Enrollment and Tuition Revenue:** We expect to see modest increases in tuition revenue in 22/23 as a result of the new tuition revenue sharing program.

**Tuition Revenue Sharing:** 21/22 earnings will be distributed in 22/23 targets. The amounts will reflect spring, Day 15 enrollment. Reports can be found [here](#).

## Budgeting Wages:

New York State Minimum Wage Plan: In April 2016 a statewide \$15 minimum wage plan was enacted. For workers in Nassau, Suffolk and Westchester Counties, the minimum wage would increase by \$1 each year until reaching \$15 on 12/31/2021 [see grid below]. If this impacts your area, please adjust your planned expenditures accordingly.

General Minimum Wage Rate Schedule			
	12/31/2019	12/31/2020	12/31/2021
Long Island & Westchester	\$ 13.00	\$ 14.00	\$ 15.00

The Federal Fair Labor Standards Act: The minimum salary threshold for exemption from overtime provisions is \$35,568 (\$684 weekly or \$1,368 bi-weekly).

For RF Employees only: New York State has a higher minimum salary threshold for exemption from overtime provisions and will increase to \$58,500 (\$1,125 weekly or \$ 2,250 bi-weekly), effective December 31, 2021. This change impacts only certain RF positions.

For Adjuncts: Salary minimums change per three-credit course per semester for part-time academic employees not paid on an hourly or basic annual salary basis. Beginning July 1, 2022: University Centers and Health Science Centers' minimum adjunct wage is \$3750.

## **BUDGETING GUIDELINES:**

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Consistency among all areas in budgeting practices is critical as we begin campus-wide efforts to monitor "budget to actuals". Units will be asked to explain variances in [quarterly budget meetings](#). Specifically, units are required to:

- Align all revenue sources with uses (state, research, Stony Brook foundation, etc.). Expense classifications should be as accurate as possible. Accuracy in coding will aid you during your quarterly budget meetings when discussing budget to actual reports.
- Any budgeted revenue (all-funds) should be within a reasonable percent of historical actuals. Exceptions may be granted by BFP&A, with provided justification.
- CBM automatically computes CSI costs for all appropriated funds (State, IFR, SUTRA, Dormitory, Hospital & Veterans Home). Any planned salary increases for RF employees will need to be manually inputted in the budget system.
- OTPS uses should be in alignment with historical actuals. Exceptions may be granted by BFP&A, with provided justification.
- When budgeting IFR activity, keep budgeted revenue and budgeted expenses within 10% of your historical actuals. This 10% limit applies to activities above \$50,000. Exceptions require approval from the Senior Vice President for Finance and Administration or their designee.
- Units must budget for all planned expenses, including those expenses being supported by prior year rollover. Specific GL classes will be used for these entries and provided in the coming weeks during training sessions.
- Units must budget for unplanned attrition. The SBU report linked [here](#) can be used to help you project attrition. Specific GL classes will be used for these entries and provided in the coming weeks during training sessions.