PRESENTATION TO:

INSTITUTIONAL RESEARCH AND PLANNING COMMITTEE

Administration & Finance
David A. Bowers
January 20, 2012
Topic Areas:

- Business & Financial Services
- Information Technology Services
- Building & Capital Projects
The fundamental goal CONTINUES to be to provide the services of accounting, budgeting, procurement, payment, collections, personnel and contracts for the College with services rendered in timely, reliable, efficient and customer friendly manner.
Business & Financial Services

Improved Services by initiating:

- **Student On-Line Payments**
- **Direct Payroll Deductions (Capital Campaign)**
- **Quarterly Management Reports**
Business & Financial Services

Pay Tuition Bills ONLINE
Convenient & Secure

www.mysunyopt.edu

For further information please contact: Erin Angarola,
Bursar - Room: 935   Phone: (212) 938-5884
- Students can now pay their tuition bills on-line— and DO!

For Spring 2012, students are able to pay their bills on-line via the internal SUNY Optometry website. Currently, of the 140 students who have paid their Spring 2012 bills, 56 or 40% have used the electronic method. Students can also receive their student refunds electronically, directly depositing them in their bank accounts.

- Employees may now have payroll deductions directed to OCNY (independent of SEFA) -- and they have done so to support the capital campaign. There are currently 6 employees who contribute $143 per pay period (over $3700 annually) in this manner- This is in addition to traditional SEFA donations for OCNY
Revenue/Appropriation-- Actual v. Target as of 2nd Q 2011-12

- **Research Foundation**
- **Campus generated revenues in excess of state appropriation**
- **Appropriation based on Clinic Pledge, other**
- **Appropriation based on Tuition, Fees**
- **State Appropriation- Core Budget**

<table>
<thead>
<tr>
<th>Fiscal Year</th>
<th>Revenue/Appropriation</th>
</tr>
</thead>
<tbody>
<tr>
<td>2010-11</td>
<td>$3,631,454</td>
</tr>
<tr>
<td></td>
<td>$6,196,264</td>
</tr>
<tr>
<td></td>
<td>$2,887,677</td>
</tr>
<tr>
<td></td>
<td>$5,728,322</td>
</tr>
<tr>
<td></td>
<td>$11,046,677</td>
</tr>
<tr>
<td></td>
<td>$1,950,721</td>
</tr>
<tr>
<td></td>
<td>$2,256,893</td>
</tr>
<tr>
<td></td>
<td>$729,019</td>
</tr>
<tr>
<td></td>
<td>$2,628,484</td>
</tr>
<tr>
<td></td>
<td>$5,523,339</td>
</tr>
<tr>
<td>2011-12</td>
<td>$3,783,594</td>
</tr>
<tr>
<td></td>
<td>$7,187,700</td>
</tr>
<tr>
<td></td>
<td>$2,959,900</td>
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<tr>
<td></td>
<td>$6,148,100</td>
</tr>
<tr>
<td></td>
<td>$9,695,000</td>
</tr>
<tr>
<td></td>
<td>$2,094,921</td>
</tr>
<tr>
<td></td>
<td>$3,213,984</td>
</tr>
<tr>
<td></td>
<td>$784,368</td>
</tr>
<tr>
<td></td>
<td>$3,538,376</td>
</tr>
<tr>
<td></td>
<td>$4,847,500</td>
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</tbody>
</table>
Business & Financial Services

State & IFR Expenditures and Encumbrances to date (12/31/11) by responsibility

- Balance
- Encumbered
- Expended
Allocated State & IFR 2011-2012
As of 12/31/11, $13.1M has been spent from State and IFR funds, this is how it has been spent.
## Utilities

<table>
<thead>
<tr>
<th>Year</th>
<th>Average Daily Electric Consumption</th>
<th>Average Steam Consumption</th>
</tr>
</thead>
<tbody>
<tr>
<td>2001-02</td>
<td>10667</td>
<td>342</td>
</tr>
<tr>
<td>2005-06</td>
<td>13041 2374 22.3%</td>
<td>572 230 67.3%</td>
</tr>
<tr>
<td>2010-11</td>
<td>12407 -634 -4.9%</td>
<td>744 172 30.1%</td>
</tr>
</tbody>
</table>
Utilities

Annual Cost of Steam & Electric

- 2001-02 ($473.5K)
- 2005-06 ($768.0K)
- 2010-11 ($1,237.3K)
Minority and Women Business Enterprises -- MWBE

Like other NYS legal or regulatory requirements, such as the Internal Control Act, this may have an administrative cost associated with it.

Besides NYS Executive Law Article 15-A, SUNY policy requires a “good faith effort.”
MWBE

YTD Activity April - December 2011

- Minority: $88,299 (4%)
- Women: $106,415 (4%)
- Other (discretionary): $2,314,744 (92%)
MWBE

Graph showing the percentage of WBE and MBE in various categories:
- 2008-9 approved plan
- Apr-Dec 2011 SUNY-wide activity
- Apr-Dec 2011 Optometry activity
- Current SUNY goals
- Current State-wide Goals
MWBE

Monthly Activity (MWBE only)

- Minority
- Women
On the Horizon

1. Finalized EHR contract needs to be implemented
2. New Phone contract
   - Discovery Phase Complete
   - Short List of Vendors
3. Equipping Fitness Center
4. Reporting requirements (DOH, NSF)
5. SFS (new State Financial System – 4/12)
6. Budget Methodology, e.g., instruct. %, peers, performance
# Phone System

<table>
<thead>
<tr>
<th>Old Phone System</th>
<th>New Phone System</th>
</tr>
</thead>
<tbody>
<tr>
<td>Contract has ended (currently approx. $15K monthly)</td>
<td>Newer technologies (projected monthly might be under $5K)</td>
</tr>
<tr>
<td>Moves, Adds, Changes reliant on Verizon</td>
<td>MACS, under VOIP would be internal (quicker turn-around time)</td>
</tr>
</tbody>
</table>
Let’s discuss…

…The Fitness Center

Though the fitness center will NOT include a pool….
It will be another resource for which we, as campus community, can be proud. It will be equipped with commercial grade equipment, and enable students and staff to enjoy workouts.
2011-2012 Allocation based on NACUBO functions of expenditures

- Clinics: $10,752,712 (38.74%)
- Research: $6,954,594 (25.05%)
- Public Ser: $98,309 (0.35%)
- Libraries: $558,821 (2.01%)
- Institution: $1,807,197 (6.51%)
- Admin: $2,441,410 (8.80%)
- M&O: $3,828,586 (13.79%)
- Student: $788,651 (2.84%)

Includes State Core and Distributed IFR allocation total $27.758M
Information Technology Services

Information Technology Services (ITS) addresses the information technology and media services needs for the educational, administrative, clinical and research areas of the College. ITS provides consultation to the College community through an active process of needs assessment, planning, development, selection, implementation, administration, training and support.
IT Highlights in 2010-11

• Provide educational technology tools that enhance teaching and learning
• Jenzabar Internet Campus Solution (JICS) portal enhancements
• Electronic Health Record System
• Redesign of UEC and College websites
• Expansion/use of IT Video Conferencing and Training Center
Tools to Enhance Teaching and Learning

- Added JICS web portal grade entry portlet for grade entry by faculty; currently testing
- Increased integration of Moodle course management system with TurningPoint and Scantron
- Expanded use of CoursEval course evaluation system and established course evaluations for academic courses and clinical teaching
- Began implementation of new CE system
- Expanded use of TurningPoint student response system, including quiz taking
JICS portal enhancements:

• Faculty grade entry
  – Pilot successful in Spring Semester 2011
  – Use for Fall Semester 2011

• Future enhancements in AY 2011-2012:
  – Online payments
    • Update: Online tuition payment now available
  – Integration with Moodle and FirstClass
Electronic Health Record System

• ITS assisted in the evaluation and final selection of EHR vendor – Versasuite
• Besides EHR, the patient management system (PM – scheduling and billing) will also be replaced with Versasuite
• Implementation will take place during AY 2011-2012
Redesign of UEC and College Websites

• ITS assisted with DCF to redesign UEC website
  – New branding elements (logo, colors)
  – Enhanced Imagery (graphics, images, video)
  – Web tool components (text sizing, contrast)
  – Enhanced user experience

• Redesign of College website scheduled for AY 2011-2012
  – Update: Launched October 28, 2011
  – Further revisions are ongoing
IT Video Conferencing and Training Center

- Internal Staff Training
  - Compliance
  - EHR
  - Moodle
- External Training
  - MS Office
- Students
  - Integrative Seminar/EHR
IT Video Conferencing and Training Center (cont.)

- Video Conferencing
  - SUNY inter-campus
  - Online collaboration with Wenzhou Medical College
2011-2012 Action Plan Highlights

• EHR Implementation
• Phone system
• Jenzabar System Upgrade
• FirstClass Email Upgrade (completed 12/28/2011)
• Complete revisions/enhancements to College website

*While working around 3rd Floor Construction
  – UPS Installation – 3rd Floor Data Center (room 305)
  – HVAC Installation – 3rd Floor Data Center, Main IT Office (room 304)
  – The Center for Student Life and Learning
Facilities Master Plan
July 2011

• Support the College’s academic mission and strategic vision by providing criteria and guidelines for campus and facility improvements.
• Improve the built environment in a way that facilitates learning by identifying opportunities for enhancement, maintenance, and improvement.
• Strengthen current and future campus program uses by identifying strategies for demolition, rehabilitation, modernization, conversion, expansion, and new construction.
• Guide future capital funding requests by identifying and prioritizing future projects for the target period of 2013 – 2023, with consideration for projects extending beyond this horizon.
Building & Capital Projects

FMP Contents:

• Phases I – V
  Campus Profile
  Assessment of Conditions
  Analysis of Space Needs
  Concept Alternatives
  Final Recommendation

• Appendices A, B, C
### Distribution of Space by Major Type

<table>
<thead>
<tr>
<th>Category</th>
<th>Existing</th>
<th>NASF</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.1 Classrooms</td>
<td>2,069</td>
<td></td>
</tr>
<tr>
<td>1.2 Lecture Halls</td>
<td>4,696</td>
<td></td>
</tr>
<tr>
<td>2.1 Teaching Labs</td>
<td></td>
<td>14,441</td>
</tr>
<tr>
<td>2.2 Individual Study Labs</td>
<td></td>
<td></td>
</tr>
<tr>
<td>2.3 *Dept. Research Labs</td>
<td></td>
<td>9,728</td>
</tr>
<tr>
<td>2.4 Faculty &amp; Staff Offices</td>
<td></td>
<td>16,490</td>
</tr>
<tr>
<td>2.5 General &amp; Special Use</td>
<td></td>
<td>266</td>
</tr>
<tr>
<td>3.0 Health &amp; Physical Ed.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>4.0 I.T.</td>
<td></td>
<td>4,187</td>
</tr>
<tr>
<td>5.0 **Organized Activities</td>
<td></td>
<td>34,657</td>
</tr>
<tr>
<td>6.0 *Organized (Sponsored) Research</td>
<td></td>
<td>300</td>
</tr>
<tr>
<td>7.0 Public Services</td>
<td></td>
<td></td>
</tr>
<tr>
<td>8.0 Assembly &amp; Exhibition</td>
<td></td>
<td>5,543</td>
</tr>
<tr>
<td>9.0 Library</td>
<td></td>
<td>11,377</td>
</tr>
<tr>
<td>10.0 Student/Faculty Activities</td>
<td></td>
<td>8,854</td>
</tr>
<tr>
<td>11.0 Student Health Services</td>
<td></td>
<td></td>
</tr>
<tr>
<td>12.0 General Admin.</td>
<td></td>
<td>14,739</td>
</tr>
<tr>
<td>13.0 Central Services</td>
<td></td>
<td>2,143</td>
</tr>
<tr>
<td>14.0 Building Services</td>
<td></td>
<td>3,870</td>
</tr>
<tr>
<td>15.0 Inactive/Unusable Space</td>
<td></td>
<td>4,145</td>
</tr>
<tr>
<td><strong>TOTAL</strong></td>
<td></td>
<td>137,505</td>
</tr>
</tbody>
</table>

*The chart shows the distribution of space by major type, with NASF indicating the number of square feet.*
Projects completed in 2008-13 capital cycle:

• Building exterior, including windows ($6.14 M)
• Fire Alarm System ($2.36 M)
• Elevators ($1.75 M)
• HVAC Controls & Balancing ($3.44 M)
• Numerous minor rehab and repair jobs ($100 K per year over 5 years)
Projects **active** in 2008-13 capital cycle:

- Rehab HVAC Systems I ($4.67 M)
- Rehab HVAC Systems II ($4.63 M)
- Rehab Electrical Systems ($6.08 M)
- Rehab Research Floors ($2.36 M)
- Lobby Renovations ($3.51 M)
- Center for Student Life & Learning ($9.28 M)
- Minor rehab and repair jobs ($100 K per year on-going)
Campus M&R Projects

- Clinic floor improvements
- Lighting Control System in Schwarz Theater
- Restroom upgrades
- Other PM jobs involving MEP systems
- Expansion of 2nd floor lecture hall to 88 seats
Thank You