



Results Oriented Management (ROM) Academic

Forecasting Tool Overview

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General Description: This document will explain how to use the ROM Academic Forecasting Tool. The tool has multiple pages: Faculty Setup Page, Faculty Summary Page, Instructional Planning Page, and Departmental Summary Page. The tool is designed to help units look at faculty, course and financial data collectively in order to develop forecasts that meet the metrics established for that unit.

Users: Main Campus units (Fiscal Agents only for FY15 forecasts).

Responsible Managers: Office of the Provost and Executive Vice President of Academic Affairs and Office of Planning, Budget, and Analysis (OPBA)

Source of Data/Scope: The tool is for forecasting I&G funds, excluding class fees (P10K), curriculum fees (P10L) and I&G self-supporting units (all program codes ending in 2). Only main campus academic units (all schools/colleges) will use the tool.

- Faculty Setup Page: Existing data is from the most recent month end faculty data (December's data).
- Faculty Summary Data: Data is summarized data from the entered data on the Faculty Setup Page.
- Instructional Planning Page: Existing data is from the frozen HED files from previous year (Summer, Fall, and Spring, i.e. AY 2012-13). Tuition rates used are calculated rates that tie back to finance tuition collected.
- Department Summary Page: Existing data is from the previous year's fiscal year end actuals.

Accessing the System:

1. Request BAR role: ROM Forecasting Tool (currently there is no organization security, this will come next year). Once approved you can access the system.
2. Login to: <https://fpa.unm.edu/htmlclient>
 - Please note that this tool does NOT work with Internet Explorer 8, so you will need to access it with another internet browser (i.e. Firefox, Chrome, Safari).
3. You will be asked to enter your UNM netID and password.
4. Once you enter the system you will find pages to select from, which include: Faculty Setup Page, Faculty Summary Page, Instructional Planning Page, and Departmental Summary Page. Once you select a page you will then select a College/School and the department you will like to work on.

Faculty Setup Page:

This page will focus on faculty salary information and faculty workload. The information from this page will be used to project average cost per class and overall annual faculty expense. The data entered in this page will be summarized in the Faculty Summary Page. Research Faculty will not be included on this page

1. Enter the department's faculty salary information, expected sections taught (for the entire year), and workload information. The cost per class and workload categories will automatically calculate.
2. You have the ability to change the instructor rank information. Please be aware that we have summarized instructor rank titles, which are listed on page 8 of this document. Be sure to use one of the categories if you need to change the instructor rank title and type the title exactly as it appears as listed.
3. When entering in faculty information, below is how to enter the following situations:
 - Retirements/Resignations/Leave Without Pay (LWOP)- be sure to delete all faculty that will no longer be with the department or are on LWOP. If you do not delete these individuals the average summary information will be incorrectly stated.
 - Leave With Pay/Sabbaticals- you do not need to delete these individuals, just be sure to change the base salary as needed.
 - Research Faculty-will not be included on this page because they generally are not paid on I&G funds and do not teach.
 - New Faculty/Split Faculty- have the ability to add faculty to the page if needed. Be sure to include all necessary cells, so all information is captured correctly.
4. Other Components- would include any type of faculty compensation not listed as a category on this page (i.e. compensation paid on a non-standard payment form).

Faculty Summary Page:

This page will summarize all the information entered in on the Faculty Setup Page, showing the totals and averages of each faculty and workload categories. On this page you will enter pooled faculty information. Data entered in on this page will be used in the Instructional Planning page and the Departmental Summary page.

1. The following are pooled faculty categories: Temporary Part Time, GA/TA/RA/PAs, Faculty Working Retirees, and Summer Instruction. Only enter sections taught and average amount per section for the categories that the department plans to use.
2. Be sure to validate that all faculty information is captured on this page.

Instructional Planning Page:

This page will focus on instructional planning, which will include the planning of courses and sections for the following academic year by semester. This page will account for the estimated tuition each course/section will generate and the estimated cost per class based of faculty rank averages projected in the Faculty Setup page.

1. Information from the previous academic year will populate the enterable cells (i.e. if projecting Fall 2014, Fall 2012 data will populate). Add and Delete sections/courses as needed. Be sure to enter information in each cell, so all needed information is captured.
2. You will have the ability to search by course, section, and subject on this page.
3. Crosslist- If a course was cross-listed in the previous academic year than you will see a “Y” in this cell next to the Course/section information. If it was not cross-listed the cell will be left blank.
4. Average Course Credit- this is the average credit hour the course/section is (i.e. if the is a variable credit hour course, then the tool has added all the credit hours from the previous academic year for that course and divided by the enrollments in that course/section.) Most courses will be either 3 credit hours or 1 credit hour.
5. Schedule Type- this is the code used to show what the type of schedule type the course/section was. A list of the description of these codes can be found on page 6 of this document.
6. Undergraduate and Graduate Enrollments- information from previous academic year’s enrollments will be in each cell. Adjusted as need, but overstating enrollment could result in an inaccurate portrayal of overall forecast.
7. Total Enrollment- calculated field adding undergraduate and graduate enrollments together.
8. Total SCH (Student Credit Hours)- calculated field multiplying Total Enrollment and Average Course Credit.
9. Tuition/Differential Tuition- the rates for the school/college will be displayed at the top of the Instructional Planning page. These rates are an estimated rates based on actual tuition collected. See full tuition rate table for each unit on page 7.
 - Tuition cell will account for both undergraduate and graduate tuition if there is enrollment for both student types in the course/section.
 - *Note: Tuition is calculated by student type, not by course type.*
10. Instructor Type- this will be a dropdown selection field, which will display the instructor rank titles listed on page 8.
 - Can only select an instructor type based on what is summarized in the Faculty Summary page for that department, although all instructor rank titles will be listed. If you select a title that is not categorized in the Faculty Summary you will receive an error message.
11. Instructional Costs- this is populated field, which will populate based on the instructor type average cost per class. This amount should equal the amount displayed in the Faculty Summary page.
12. Instructional Contribution- this is a calculated field taking the amount of tuition that course/section generates less the instructional cost per course. This amount can be positive or negative.

Departmental Summary Page:

On this page the department will need to project all (within the scope of the tool) expenditures for the projected fiscal year. Faculty data will populate from the Faculty Summary page to account for the faculty expense for the projected fiscal year.

1. Previous Fiscal Year Actuals- this is the previous fiscal year's actual expenses (i.e. projecting 2014-2015, then data displayed is FY13 actuals).
2. Projected Fiscal Year Total- all cells will have the ability to enter information as needed, except the Faculty Salaries and GA/TA/RA/PA cells. Information for the Faculty Salaries and GA/TA/RA/PA cells will be populated from the Faculty Summary page.
3. You will use your projections from the Faculty Summary Page for Temporary Part Time and Faculty Working Retirees. You will want to add the total cost of these categories together (i.e. TPT 10 sections at \$4K per section would equal \$40K and working retirees 2 sections at \$5K per section would equal \$10K, so total to enter \$50K) and enter the total in the Faculty Temporary Part Time row.

Functionality of the ROM Academic Forecasting Tool: Tips on how to use the tool most effectively.

1. Because the each page has multiple enterable columns and rows using the zoom functions (Ctrl – and +) will help view the page as needed.
2. Information should be entered in by row and not by column.
3. Be sure to save multiple times to ensure data is accurately saved.

Suggested Timeline:

1. January
 - Tool opens January 13th, 2014.
 - Work on Faculty Setup Page:
 - i. Update all faculty salary information.
 - ii. Send Projected Faculty Workload Summary Report with updated faculty salary information to departments to enter workload information.
 - iii. Send Projected Instructional Planning Report to departments to enter course/section/enrollment information.
2. February
 - Have departments return Faculty Setup and Instructional Planning spreadsheets.
 - Review and make suggestions on workload, course load, and expenditure projections. Return spreadsheets as needed for corrections.
 - Enter final projections in the tool.
 - Print/PDF final projections for department's/school's/college's records.
 - Tool will lock for schools/colleges February 21st, 2014.

ROM Academic Forecasting Tool Reports:

These reports are designed to help units validate information entered into the tool. You will have the ability to run the reports by department and school/college. When running the report by college/school (level 3 org.) you will see a summary of each department (level 5 org.). When running the reports by department (level 5 org.) you will see the detailed information for that unit. Units will also have the ability to export these reports into excel to use as working documents as needed.

Accessing the Reports:

1. Request BAR role: ROM Reports (currently there is no organization security, this will come next year). Once approved you can access the reports.
2. Login to MyReports: https://myreports.unm.edu/ibi_apps/signin
3. Once logged in select "Portal" at top of the page
4. Select "ROM Portal"
5. Select "ROM Reports" tab
6. On the "ROM Reports" tab you will find several reports listed including the ROM reports for the tool.

Reports:

1. Projected Faculty Workload Summary- Shows faculty data entered in the forecasting tool.
2. Projected Instructional Planning- Shows instructional data entered in the forecasting tool.
3. Projected Gross Contribution- Shows projected tuition generation and projected expenditure data entered in the tool.

Schedule Type Codes:

Schedule Type Code	Schedule Type Description
AM	Applied Music
CL	Clinical Clerkship
CM	Chamber Music
CO	Cooperative Education
DS	Dissertation
EX	Practice Experience
IN	Independent Study
LB	Laboratory
LC	Lecture
LL	Combined Lecture/Lab
LP	Lecture/Practice Experience
ME	Major Music Ensemble
MP	Music Pedagogy
MR	Music Repertory
PD	Prof Paper/Project/Design Project
RC	Recitation
SM	Seminar
ST	Studio
TH	Thesis
TP	Topics
WR	Writing
WS	Workshop

Tuition Rates:

Fiscal Year	Academic Year	Semester	Organization	Org Description	Base UG	Diff UG	Base GR	Diff GR	Diff DR	Rate DS
2014	2013	201360	ABI	Anderson Schools of Management	171.47	0.00	242.07	117.44	117.44	594.00
2014	2013	201360	ABH	College of Arts and Sciences	171.47	0.00	226.32	0.00	0.00	594.00
2014	2013	201360	ABJ	College of Education	171.47	0.00	226.32	0.00	0.00	594.00
2014	2013	201360	ABG	College of Fine Arts	171.47	0.00	226.32	0.00	0.00	594.00
2014	2013	201360	AFD	College of Nursing	171.47	110.29	226.32	144.08	212.29	594.00
2014	2013	201360	AFE	College of Pharmacy	171.47	0.00	262.08	232.21	232.21	594.00
2014	2013	201360	ABA	Provost Administrative Units	171.47	0.00	226.32	0.00	0.00	594.00
2014	2013	201360	ACC	Associate VP Student Services	171.47	0.00	226.32	0.00	0.00	594.00
2014	2013	201360	ABM	School of Arch. and Planning	171.47	0.00	226.32	49.75	49.75	594.00
2014	2013	201360	ABK	School of Engineering	171.47	0.00	226.32	0.00	0.00	594.00
2014	2013	201360	ABL	School of Law	171.47	0.00	211.60	296.78	296.78	594.00
2014	2013	201360	AFC	School of Medicine	171.47	0.00	226.32	0.00	0.00	594.00
2014	2013	201360	ABC	School of Public Admin	171.47	0.00	226.32	50.00	50.00	594.00
2014	2013	201360	ABB	University College	171.47	0.00	226.32	0.00	0.00	594.00
2014	2013	201360	ABN	University Libraries	171.47	0.00	226.32	0.00	0.00	594.00
2014	2013	201360	497J	Physical Therapy	171.47	0.00	226.32	0.00	149.00	594.00
2014	2013	201380	ABI	Anderson Schools of Management	171.47	0.00	242.07	117.44	117.44	594.00
2014	2013	201380	ABH	College of Arts and Sciences	171.47	0.00	226.32	0.00	0.00	594.00
2014	2013	201380	ABJ	College of Education	171.47	0.00	226.32	0.00	0.00	594.00
2014	2013	201380	ABG	College of Fine Arts	171.47	0.00	226.32	0.00	0.00	594.00
2014	2013	201380	AFD	College of Nursing	171.47	110.29	226.32	144.08	212.29	594.00
2014	2013	201380	AFE	College of Pharmacy	171.47	0.00	262.08	232.21	232.21	594.00
2014	2013	201380	ABA	Provost Administrative Units	171.47	0.00	226.32	0.00	0.00	594.00
2014	2013	201380	ACC	Associate VP Student Services	171.47	0.00	226.32	0.00	0.00	594.00
2014	2013	201380	ABM	School of Arch. and Planning	171.47	0.00	226.32	49.75	49.75	594.00
2014	2013	201380	ABK	School of Engineering	171.47	0.00	226.32	0.00	0.00	594.00
2014	2013	201380	ABL	School of Law	171.47	0.00	211.60	296.78	296.78	594.00
2014	2013	201380	AFC	School of Medicine	171.47	0.00	226.32	0.00	0.00	594.00
2014	2013	201380	ABC	School of Public Admin	171.47	0.00	226.32	50.00	50.00	594.00
2014	2013	201380	ABB	University College	171.47	0.00	226.32	0.00	0.00	594.00
2014	2013	201380	ABN	University Libraries	171.47	0.00	226.32	0.00	0.00	594.00
2014	2013	201380	497J	Physical Therapy	171.47	0.00	226.32	0.00	149.00	594.00
2014	2013	201410	ABI	Anderson Schools of Management	171.47	0.00	242.07	117.44	117.44	594.00
2014	2013	201410	ABH	College of Arts and Sciences	171.47	0.00	226.32	0.00	0.00	594.00
2014	2013	201410	ABJ	College of Education	171.47	0.00	226.32	0.00	0.00	594.00
2014	2013	201410	ABG	College of Fine Arts	171.47	0.00	226.32	0.00	0.00	594.00
2014	2013	201410	AFD	College of Nursing	171.47	110.29	226.32	144.08	212.29	594.00
2014	2013	201410	AFE	College of Pharmacy	171.47	0.00	262.08	232.21	232.21	594.00
2014	2013	201410	ABA	Provost Administrative Units	171.47	0.00	226.32	0.00	0.00	594.00
2014	2013	201410	ACC	Associate VP Student Services	171.47	0.00	226.32	0.00	0.00	594.00
2014	2013	201410	ABM	School of Arch. and Planning	171.47	0.00	226.32	49.75	49.75	594.00
2014	2013	201410	ABK	School of Engineering	171.47	0.00	226.32	0.00	0.00	594.00
2014	2013	201410	ABL	School of Law	171.47	0.00	211.60	296.78	296.78	594.00
2014	2013	201410	AFC	School of Medicine	171.47	0.00	226.32	0.00	0.00	594.00
2014	2013	201410	ABC	School of Public Admin	171.47	0.00	226.32	50.00	50.00	594.00
2014	2013	201410	ABB	University College	171.47	0.00	226.32	0.00	0.00	594.00
2014	2013	201410	ABN	University Libraries	171.47	0.00	226.32	0.00	0.00	594.00
2014	2013	201410	497J	Physical Therapy	171.47	0.00	226.32	0.00	149.00	594.00

Instructor Rank Titles:

Affiliate_Other

AFIL_Faculty_CNM
AFIL_Faculty_LAT
AFIL_Faculty_ROT
AFIL_Faculty_Vol_HSC
AFIL_Visiting_Colleague

Assistant Professor

Assistant Professor
Visiting Asst Professor

Associate Professor

Associate Professor
Visiting Assoc Professor

Clinician Ed - Assist Prof

Clinician Ed - Assist Prof

Clinician Ed - Assoc Prof

Clinician Ed - Assoc Prof

Clinician Ed - Instructor

Clinician Ed - Instructor

Clinician Ed - Professor

Clinician Ed - Professor

Faculty Working Retiree

Associate Professor Emeritus
Faculty Working Retiree
Professor Emeritus

GA_TA_PA_RA

Graduate Asst Regular
Graduate Asst-Special
Project Assistant
Research Assistant
Teaching Associate
Teaching Asst Regular
Teaching Asst Special

Instructor

Instructor
Visiting Instructor

Lecturer

Lecturer
Lecturer I
Lecturer II
Lecturer III
Professor of Practice
Visiting Lecturer
Visiting Lecturer I
Visiting Lecturer II
Visiting Lecturer III

Post-Doctoral Fellow

Post-Doctoral Fellow
Post-Doc

Professor

Distinguished Professor
Professor
Visiting Professor

Temp Part-time Faculty

Research Assistant Professor
Research Assoc Professor
Research Associate Professor
Research Lecturer
Research Lecturer II
Research Lecturer III
Research Professor
Research Scholar
Staff as TPT Faculty
Temp Part-time Faculty
Temporary Faculty
Temporary Part-time Faculty
Term Teaching Faculty