



University of Washington

FY2024 Operating Budget Development Process Guide



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0. Change Log

Version	Release Date	Major Changes
100322	10/3/22	Original document release
102622	10/26/22	Updated Section 7.6.2 Planning Expectation vs. Actual Data Load
		Updated Section 7.6.3 Sheet 8 Compensation Expense Suggested Approach
		Updated Section 7.8 Compensation Expense: New Positions (Sheet 10)
121622	12/16/22	Section 7.9 Removed – Carryover Usage Plan (Sheet 5) Removed from FY24 Process

1. Introduction

On October 3, 2022, Provost Richards sent his [FY2024 Operating Budget Development kickoff letter](#) to leadership in UW units and campuses, initiating this year's dialogue with faculty, staff, and students about institutional needs, resource constraints, priorities, and financial health. The letter outlines Provost Richards' key questions, the challenges facing the University, relevant deadlines, and a variety of budget development resources.

This process guide is intended to be a consolidated resource to assist units in the preparation and submission of required materials. This **process guide is not intended to serve as training materials focused on how to use the Workday Adaptive Planning software.**

The Office of Planning and Budgeting (OPB) is available throughout this process to offer support to campuses and units as necessary to ensure submitted materials are representative of unit operations, opportunities, and challenges.

For planners reviewing this document whose units/department/divisions/etc. roll up under a Chancellor, Dean, Vice President, or Vice Provost, please defer to the finance lead within the Dean/VP/Chancellor's office. Guidance on local planning processes to be utilized within each major organization may have different internal deadlines necessary to achieve alignment with the enterprise guidance referenced within this document.

2. Items Requiring Completion

Impacted Units/ Campuses	Subject Area	Details	Access or Distribution Method	Submission Method	Due by
UW Seattle Academic Units, UW Bothell, UW Tacoma	Tuition Based Program Rate Recommendation & Enrollment Forecasts	Templates utilized to collect tuition rate recommendations, by tuition category and residency category, and enrollment projections for grad/professional programs	FY2024 Operating Budget Development Materials webpage	Upload to the Tuition Rate Recommendation and Enrollment Forecast Portal	February 1, 2023
All Academy	FY24 Operating Budget Proposal	Proposed FY24 Operating Budget	Workday Adaptive Planning Release 1 (R1)	Complete data entry in Workday Adaptive Planning	March 17, 2023
All Academy	Operating Budget Narrative Responses	Word template collecting narrative information related to programmatic and fiscal vitality	FY2024 Operating Budget Development Materials webpage	Upload to the Operating Budget Narrative Response Submission Portal	

3. Timeline

The high-level timeline displayed on the next page is intended to provide the planning community with a general sense of the FY24 planning schedule as we shift towards leveraging a single academy-wide tool for budget development, Workday Adaptive Planning. For the complete planning calendar, containing specific dates please click on the timeline below or visit the FY24 Operating Budget Materials website, [FY24 Operating Budget Development Cycle Timeline](#) link.

Key Item	Activity	Aug-22	Sep-22	Oct-22	Nov-22	Dec-22	Jan-23	Feb-23	Mar-23	Apr-23	May-23	Jun-23	Jul-23
	Adaptive R1 Released to OPB	UWFT											
	OPB FY24 Planning Process Guide Development	OPB											
	Adaptive Open For FY24 Planning			OPB									
W	Academy FY24 Planning Window												
	Base Planning Parameters Available & Populated in Adaptive				OPB								
W	Tuition Rate Recommendations and Enrollment Forecasts Due to OPB							Academy					
	ABB Preliminary Estimates Loaded In Adaptive							OPB					
	OPB Meetings with Unit Administrators							Academy					
	Optional: Update Tuition Rate Recommendations								Academy				
W	Adaptive System Locked - Primary Planning Window Closes								OPB				
	OPB Review of Unit Plans								OPB				
	Optional: Update Tuition Rate Recommendations									Academy			
	Budget Meetings w/Executive Office									Exec Office/ Academy			
	Optional: Final Opportunity to Update Tuition Rate Recommendations										Academy		
W	Adaptive Unlocked for Final Adjustments										Academy		
	ABB Final Estimates Loaded in Adaptive											OPB	
	Board of Regents Proposed Budget Information Item											BOR	
W	Adaptive Locked - No Further Changes to FY24 Budget Proposal											OPB	
W	Board of Regents Proposed Budget Action												BOR
	FY24 Adopted Budget Loaded into Workday												OPB/UWFT

4. Fundamental Changes – Concepts and Nomenclature

With the movement from legacy systems (FAS, BGT) onto the Workday Financials platform and ancillary software, a fundamental shift in budgeting concepts and nomenclature is necessary. The sections below summarize key planning concepts and nomenclature shifts as the community begins to leverage the first broadly deployed work product stemming from the UWFT program – Workday Adaptive Planning.

4.1. Elimination of the concept of “Budget Authority” and the terms “Permanent”, “Temporary”, “Carryforward”, and “Carryover”

With the transition from BGT to the Workday platform, the concepts of permanent (ongoing), temporary (one time or duration limited) and carryforward budget values will cease to exist. Expenses and revenues will be described as either budgeted for the period (month, year, etc.) or not budgeted.

Legacy Term	Future State Term/Concept	How to Think of this Shift
Budget Authority	Revenues, Distributions (ABB, RCM, State appropriations, etc.)	- Expenditures will be budgeted (i.e., “planned for”), but the budget values themselves <i>do not represent authority to expend</i>. - With the adoption of Workday, the UW will shift to revenue and expenditure budgeting for all funds. Units will be required to operate within their actual revenue and any accumulated net position (i.e., carryover, “reserves”, etc.)
Permanent	“Ongoing”	- Legacy term did not practically mean “forever”, rather represented a budget value that systematically continued into the next period - For ongoing expenses or ongoing revenues, the budget value would need to be budgeted for each period the expense is expected to be ongoing.
Temporary	“One Time”, “Time Constrained”, “Duration Limited, etc.	- For one time or time limited expenses or revenues, the value would need to be budgeted for each period the expense is expected to be incurred or revenue recognized. - Budget value has an expected start and known or anticipated end date
Carryforward	No Analogous Term	Legacy artifact of the biennial nature of BGT as the system was designed. The term and applied concept of carryforward will not translate to future state.
Carryover	Net Position and Accumulated Net Position	- Legacy term and future state term both reflect the concept of unused resources from one period becoming available in a future period - In legacy terms, this is calculated as budget authority minus actual expenses - In future state terms, this is calculated as actual revenues minus actual expenses equals net position. Net position added across multiple periods equates to accumulated net position

4.2. Concept of a “Set” Adopted Budget – Once Set, Budget Values Will Not Change

Legacy systems and processes enabled end users to modify their budget values throughout a fiscal year and biennium. While highly flexible and enabling the opportunity for “budget” to mirror “actual”, this flexibility severely hamstrung local unit and enterprise multiyear planning efforts. With the transition to Workday Financials, the UW is significantly shifting its approach to planning and budgeting to that of a fixed budget upon adoption by the Board of Regents. In other words, once a budget is entered by business units in Adaptive, approved through Executive Leadership and adopted by the Board of Regents, **it will not change**.

Can I...	Legacy State	Future State	How will I manage in Future State?
Change a budget value after it is adopted?	Yes, budget revisions occur throughout the biennium	No, once the plan is approved, it is set for the full year and does not change*	- Budget to actual <i>variances</i> will inform budget performance against the planned budget performance – how I <i>thought</i> I would end up vs how I <i>actually</i> ended up <u>Actual</u> revenues minus <u>actual</u> expenses plus accumulated net position will inform how much I have <i>available</i> to spend <u>Just because an expense is in the approved budget does not imply a unit has the ability or authority to expend</u>. A budgeted item implies it is a <i>planned expenditure</i>. A unit must ensure it has sufficient <i>actual</i> revenue to cover the cost of the <i>planned expenditure</i>.

* with the exception of mid-year budget reductions required by executive leadership during times of financial duress

4.3. “Revenue Planning” for Core Academic Operating Funds (GOF/DOF)

Legacy systems were built around and relied on the concept of “budget authority”, which effectively functioned as a proxy for “revenue” within the core academic operating funds (GOF/DOF). In Workday and Adaptive Planning, revenues will be planned for across all fund types.

Fund Type	Legacy Term	Workday/Adaptive Planning Terms	How to Think of This Shift
Core Academic Operating Funds (GOF/DOF)	Budget Authority	Revenues, Distributions (ABB, RCM, State appropriations, etc.)	• Legacy budget authority placed in expenditure budget object codes reflected the maximum ability to spend • The answer to “how much did I bring in/generate” can be found by looking at actual recognized revenue or distributions total. • “How did I plan to spend” can be found by referencing the budgeted expenditure lines. • “How did I actually spend” can be found by referencing the actual expenditure lines. • “How much do I have left to spend” can be found by referencing the actual net position and change in net position • Budgeted revenues or distributions may differ from actual recognized revenues or distributions, resulting in a variance.
All Other Fund Types	Revenue	Revenue	• Aside from shifting to full accrual accounting, no change to the concept of “revenue” on all other fund types

4.4. Expanding on the Role of “Position Budgeting”

Legacy enterprise systems included functionality for position budgeting but were limited to core academic operating funds. At the onset of the UW’s significant investment in the Finance Transformation program, one of the identified “must haves” for the institution was the ability to adopt full position budgeting for all fund sources at the time of go live.

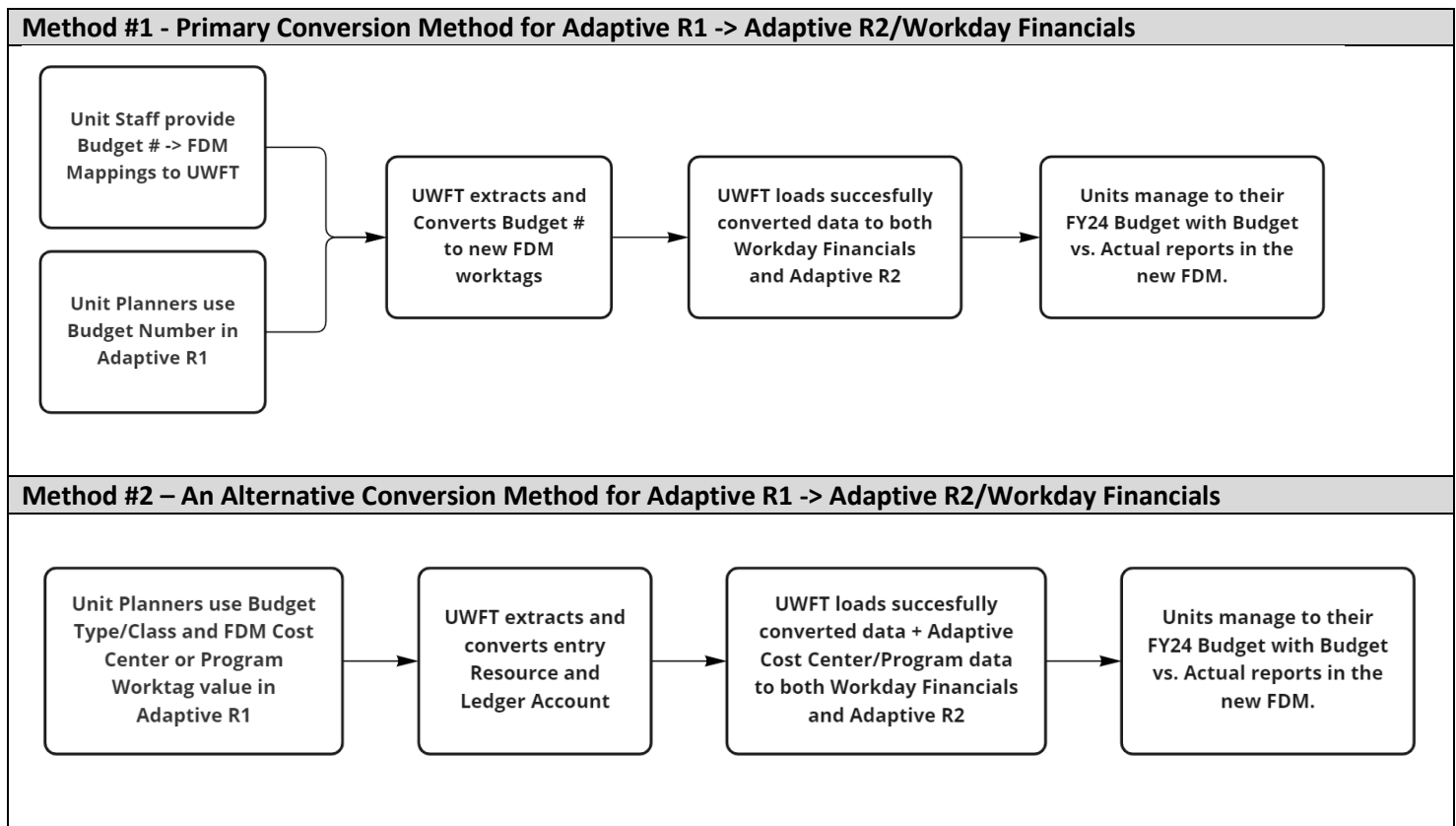
Fund Type	Legacy Enterprise Functionality	Adaptive Planning Ability	Key Differentiators for Position Budgeting in Future State
Core Academic Operating Funds (GOF/DOF)	Monthly position budgets in BGT	Monthly position budgets (position management) and monthly pools by job profile (job management)	All positions which belong to the Position Management Staffing Model in HRP: Monthly budget which includes position , cost center, and resource.
All Other Fund Types	None		All positions which belong to the Job Management Staffing Model in HRP: Monthly budget which includes job profile , cost center and resource.

5. Translation Strategy Overview

Adaptive R1 represents the first of many steps to realize the transformation goals for planning and management reporting at the UW. Key to that transformation is the new Foundation Data Model (FDM) which will go live July 1, 2023 alongside Workday Financials and Adaptive Release 2. This section provides a high-level overview of the translation strategy from legacy (FAS/BGT) to future state (Workday FDM) and is not intended to be fully exhaustive. Rather, this section seeks to provide directional guidance with a focus on ensuring the minimum necessary level of detail to manage unit/campus operating budgets in future state successfully converts from legacy data structures to Workday FDM.

5.1. Translation Strategy Overview – Budget Numbers to FDM

Users will enter budget data in Adaptive Release 1 using legacy data dimensions like Budget Number and Organization Code. These entries will be converted to the future-state Foundation Data Model (FDM) by UWFT based on the mapping logic that units/campuses provided to UWFT over the course of the project. Due to the complexity of this conversion, there are two mutually exclusive strategies to ensure accurate conversion meets the minimum level of detail required while also not exceeding the maximum level of detail available.



5.2. Translation Strategy: Object Codes and Revenue Codes to Workday Ledger Accounts, Spend and Revenue Categories

With the transformation from legacy FAS chart of account elements (object-sub-object and revenue codes) to Workday FDM, the UW took advantage of the opportunity to fully overhaul its “chart of accounts” or the way we code financial transactions in their natural revenue (think tuition, gift, etc.) or natural expense (think office supplies, travel, etc.) classifications.

In undertaking this overhaul, which brings together business requirements from many UW organizations, it became apparent that a 1:1 relationship between current state (object-sub object and revenue codes) and future state (ledger accounts, revenue categories and spend categories) was not possible nor ideal for the UW. As a result, **it is not possible to replicate the current state chart of account structure in exactly the same way in future state.** Future state will have significantly more flexibility and detail to meet business needs, however, this means converting the relatively limited legacy state to the FDM ledger, spend and revenue categories is an extremely challenging exercise.

In legacy systems, planners typically budget salary and wage expenditures at the four-digit object level and benefits, plus non-compensation expenditures at the two-digit level. While this is possible, and, *for FY24 planning in Adaptive R1, advisable to do*, **there is a high likelihood that actual transactions will post to ledgers and spend categories that are organized differently in future state and thus produce a budget variance when viewed at a detailed level.** This is normal and to be expected during any major financial system transformation. When the FY25 planning cycle kicks off in the fall of 2023, several months of actual transactions will have posted and help inform the next cycle when the UW both plans and transacts in the same chart of accounts (Workday FDM).

With this in mind, it is recommended that units/campuses focus on establishing FY24 budget values in Adaptive R1 at the following levels of detail:

5.2.1. Compensation Expense Ledger Accounts – Suggested Planning Strategy

Plan at: Four-digit salary object code.

Converts to: Workday Ledger accounts only

Legacy four-digit object	Converts to (Ledger Account Only)
01-10 - INSTR/RES FACULTY SAL	50000: Salaries and Wages - Instruction and Research Faculty
01-20 - AUX TEACHING STAFF SAL	50020: Salaries and Wages - Residents and Chief Residents
01-30 - GRAD SCH STD TEACH SAL	50030: Salaries and Wages - Graduate Student Appointments
01-40 - GRAD STD NON-TEACH SAL	50030: Salaries and Wages - Graduate Student Appointments
01-50 - POSTDOC RESCH TRAINEES	50040: Salaries and Wages - Post-Doctoral Trainees
01-60 - CLASS (HEPB) STAFF SAL	50050: Salaries and Wages - Classified Staff
01-70 - PROFESSIONAL STAFF SAL	50060: Salaries and Wages - Professional Staff
01-80 - HRLY,EXCES PAY,OVRTIME	50100: Salaries and Wages - Hourly, Visiting Scientists, and Overtime
01-90 - FELLOWS AND TRAINEES	50110: Salaries and Wages - Pre-Doctoral Fellows and Trainees

5.2.2. Benefits – Suggested Planning Strategy

Plan at: Two-digit benefit object code (pre-calculated in Adaptive R1, no additional user input required beyond plans at the four-digit salary object code)

Converts to: Workday Ledger account only. Values entered at the salary object code level will automatically calculate and translate to the appropriate benefit ledger account.

Legacy two-digit object	Converts to (Ledger Account only)
07-00 - RETIREMENT & BENEFITS	53999: Fringe Benefits (Conversion Only)

5.2.3. Non-Compensation Expenses – Suggested Planning Strategy

Plan at: Two-digit expense object codes

Converts to: Workday Ledger accounts only

Legacy two-digit object	Converts to (Ledger Account Only)
02-00 - CONTRACT PERS.SERVICES	62690: Other Purchased and Contract Services
03-00 - OTHER CONTRACTUAL SERV	62690: Other Purchased and Contract Services
04-00 - TRAVEL	62400: Travel
05-00 - SUPPLIES AND MATERIALS	60210: Supplies and Materials
06-00 - EQUIPMENT	60000: Non-Capitalized Equipment and Furniture
08-00 - GRANTS & SUBSIDIES	53300: Grants and Subsidies

5.2.3.1. Non-Compensation Expenses – Alternate Strategy

If planning at a two-digit object code risks significant downstream impacts to a unit's/campus's ability to manage during the transition fiscal year (FY24), planners may elect to plan *non-compensation expenditures* at a four-digit object-sub-object code level. The translation table for all four-digit object-sub-object code combinations will be made available in early November [†]. Please note, that even planning at this lower level of legacy detail, **it will not be possible to convert every four-digit object/sub-object code into a unique ledger-spend category combination** due to the nature of the transformation at hand.

6. Minimum Level of Detail Required, Maximum Level of Detail Available

To ensure entries in Adaptive R1 that use legacy data dimensions like Budget Number and Object Code are converted to the future state Foundation Data Model (FDM) and load accurately into Adaptive Release 2 and Workday Financials at go live, users will need to pay careful attention to which values are used in which circumstances. **Sometimes Budget # is the best basis for FY24 budget entry. Sometimes Budget Type/Class is the better choice.** The table below highlights when to use which based on your units' specific legacy values, future state FDM values and mapping between the two.

Fund Grouping	Minimum Detail <u>Required</u>	Maximum Detail Available to Plan By
Core Academic Operating Funds (GOF/DOF)	<u>Time Horizon:</u> FY2024 <u>Worktags:</u> Cost Center, Resource, Ledger Account, Position	<u>Time Horizon:</u> FY2023-2026 <u>Worktags:</u> Cost Center, Resource, Ledger Account, Position plus Spend Category, Revenue Category Additionally, if included in your Budget # mappings previously submitted to the UWFT FDM team: Program, Project, Assignee, Activity
Self-Sustaining	<u>Time Horizon:</u> FY2024 <u>Worktags:</u> Cost Center, Ledger, Resource, Position	<u>Time Horizon:</u> FY2023-2026 <u>Worktags:</u> Cost Center, Resource, Ledger Account, Position plus Spend Category, Revenue Category Additionally, if included in your Budget # mappings previously submitted to the UWFT FDM team: Program, Project, Assignee, Activity

Fund Grouping	Minimum Detail <u>Required</u>	Maximum Detail Available to Plan By
Gifts	<u>Time Horizon:</u> FY2024 <u>Worktags:</u> Cost Center, Ledger, Resource, Position	<u>Time Horizon:</u> FY2023-2026 <u>Worktags:</u> Cost Center, Resource, Ledger Account, Position plus Spend Category, Revenue Category Additionally, if included in your Budget # mappings previously submitted to the UWFT FDM team: Gift, Program, Project, Assignee, Activity
Grants	<u>Time Horizon:</u> FY2024 <u>Worktags:</u> Cost Center, Ledger, Resource, Position	<u>Time Horizon:</u> FY2023-2026 <u>Worktags:</u> Cost Center, Resource, Ledger Account, Position plus Spend Category, Revenue Category Additionally, if included in your Budget # mappings previously submitted to the UWFT FDM team: Grant, Program, Project, Assignee, Activity

7. Suggested Approach - Data Entry

We recognize that financial transformation is not accomplished by merely moving to a single, shared enterprise budgeting tool. Our current state planning processes must shift and change as much as our systems and data structures do. Additionally, the wide and beneficial diversity of units and activities across the University of Washington make process changes all the more complex. **Nonetheless, below are suggested approaches to common situations that will, when consistently applied, maximize our collective realization of financial transformation.** The information below is organized by Adaptive R1 entry sheet and includes options for data entry both conversion strategies, based on how your unit intends the translation to be handled.

7.1. Non-Compensation Expenses (Sheet 6): All Funds

Translation Intent	Adaptive Dimension Entries		Adaptive Timespan Entries
	In this Column:	Select this value:	
Method #1 - Primary FY24 plan vs actuals by - Cost Center - Ledger Account - Resource PLUS any of the following: - Program worktag - Assignee worktag - Activity worktag - Gift worktag - Grant worktag	Required: Budget Number	The budget number mapped to your desired future state FDM Worktags.	\$ values in the month(s) that most closely matches the expected timing of the expenditures. Breakback is a good option to use for regular recurring expenses.
	Required: Object Code	The most appropriate Object Code. An Object/Sub-Object Code combination is available to plan with, if necessary, but is not a suggested approach	
	Optional: Notes	Any notes that would be helpful to you or your collaborators about the expense. Notes are not visible anywhere but on this particular Sheet.	



Translation Intent	Adaptive Dimension Entries		Adaptive Timespan Entries
	In this Column:	Select this value:	
Method #2 - Alternative FY24 plan vs actuals by only: - Cost Center - Ledger Account - Resource	Required: Budget Number	The appropriate Budget Type/Class for this expense.	\$ values in the month(s) that most closely matches the expected timing of the expenditures. Breakback is a good option to use in this scenario. Breakback is a good option to use for regular recurring expenses.
	Required: FDM-Cost Center	The future-state Cost Center to which this expense belongs.	
	Optional: FDM-Program	If you do not select Cost Center, you must select the Program to which this expense belongs. (NOTE: If a Budget # maps 1:1 to a Program, please do NOT enter Program here, but use Budget # as indicated below. Do not enter both Program and Cost Center. Cost Center will be derived from Program during conversion.	
	Required: Object Code	The most appropriate Object Code. An Object/Sub-Object Code combination is available to plan with, if necessary, but is not a suggested approach	
	Optional: Notes	Any notes that would be helpful to you or your collaborators about the expense. Notes are not visible anywhere but on this particular Sheet.	

Special Object Code Situations:

- 1) Facilities & Administration Expense (F&A) on Grants and Sponsored Projects: Use local data and assumptions to calculate an appropriate dollar figure and enter with Object-SubObject code 25-99
- 2) Internal Sales of Goods or Services to other Campus units: Workday Financials Internal Service Provider functionality will post internal sales to natural class ledger accounts, entry in R1 will follow suit to allow alignment of budget to actuals. To record your planned internal purchases, use the appropriate 21-xx object-subobject code which will be mapped to a revenue ledger account.

7.2. Revenue: Core Academic Funds (Sheets 1, 2 or 3)

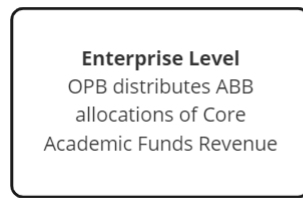
Core Academic Funds Revenue is entered into Adaptive R1 on Sheet 1 for the UW Seattle Campus, Sheet 2 for UW Bothell Campus, and Sheet 3 for UW Tacoma Campus. Structurally the sheets are the same, but each has different Level, Dimension and Attribute values enabled in the drop-down menus.

A NOTE ABOUT LEVELS: Selecting the appropriate 10-digit organization code Level is of utmost importance on these sheets where there is often a “distributing” unit and a “receiving” unit. Conceptually, you may think of this revenue as cascading down from OPB to the Chancellor/Dean/VP level and then further to divisions, departments and other entities represented today by 5-, 7- or 10-digit organization codes.

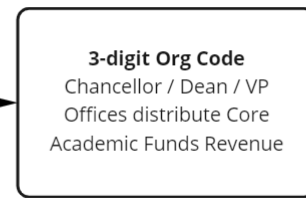
In Adaptive R1, enter ONLY the “final destination” of the cascading distribution – only enter at the “receiving” units Level. Do NOT enter each step of the cascade. Therefore, on Sheets 1, 2 or 3 enter your Core Funds Revenue plan values in the same 10-digit organization code that will receive those funds. This is so the revenue will reside in the same organization code Level that will transact the expense.



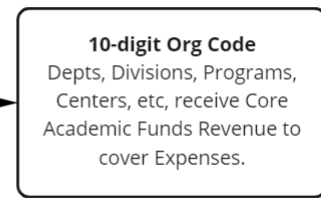
Not Entered on Sheets 1, 2, or 3



Not Entered on Sheets 1, 2, or 3



Entered on Sheets 1, 2, or 3



Translation Intent	Adaptive Dimension Entries		Adaptive Timespan Entries
	In this Column:	Select this value:	
Method #1 - Primary FY24 plan vs actuals by - Cost Center - Ledger Account - Resource PLUS any of the following: - Program worktag - Assignee worktag - Activity worktag	Required: Revenue Code	Core Academic Funds Transfer In	A positive \$ value in the month(s) that most closely matches the expected timing of the expenditures. Breakback is a good option to use when funding recurring expenses, such as permanent, 12-month salaries.
	Required: Budget Number	The budget number mapped to your desired future state FDM Worktags.	
	Optional: Notes	Any notes that would be helpful to you or your collaborators about the revenue. Notes are not visible anywhere but on this particular Sheet.	
Method #2 - Alternative FY24 plan vs actuals by only: - Cost Center - Ledger Account - Resource	Required: Revenue Code	Core Academic Funds Transfer In	A positive \$ value in the month(s) that most closely matches the expected timing of the expenditures. Breakback is a good option to use when funding recurring expenses, such as permanent, 12-month salaries.
	Required: Budget Number	The appropriate Budget Type/Class for this expense.	
	Required: FDM-Cost Center	The future-state Cost Center to which this expense belongs.	
	Optional: FDM-Program	If you do not select Cost Center, you must select the Program to which this expense belongs. (NOTE: If a Budget # maps 1:1 to a Program, please do NOT enter Program here, but use Budget # as indicated below. Do not enter both Program and Cost Center. Cost Center will be derived from Program during conversion.)	
	Optional: Notes	Any notes that would be helpful to you or your collaborators about the expense. Notes are not visible anywhere but on this particular Sheet.	

For situations where your unit transfers Core Academic Funds to a unit outside your 3-digit Organization Code hierarchy, data entry will follow all the above except what's noted below.



Translation Intent	Adaptive Dimension Entries		Adaptive Timespan Entries
	In this Column:	Select this value:	
Method #1 – Primary and Method #2 - Alternative	Required: Revenue Code	Core Academic Funds Transfer Out for the 10-digit organization code sending the transfer.	A negative \$ value in the month(s) that most closely matches the expected timing of the expenditures.
	Required: Revenue Code	Core Academic Funds Transfer IN for the 10-digit organization code receiving the transfer.	A positive \$ value in the month(s) that most closely matches the expected timing of the expenditures.

7.3. Revenue: Gifts (Sheet 4)

Scenario	Translation Intent	Adaptive Dimension Entries	Adaptive Timespan Entries
Unrestricted, “Current Use,” gifts	Method #1 - Primary FY24 plan vs actuals by - Cost Center - Ledger Account - Resource PLUS any of the following: - Program worktag - Assignee worktag - Activity worktag - Gift worktag	Required: Budget #: the budget # mapped to the FDM Worktags in your units submission to UWFT. Revenue Code: “Gift Revenue”	\$ values in the month(s) that most closely matches the expected timing of receiving the contribution(s).
	Method #2 - Alternative FY24 plan vs actuals by only: - Cost Center - Ledger Account - Resource	Required: Budget #: Budget Type/Class Revenue Code: “Gift Revenue” FDM Cost Center or Program value	
Spendable Endowment distributions	Method #1 - Primary FY24 plan vs actuals by - Cost Center - Ledger Account - Resource PLUS any of the following: - Program worktag - Assignee worktag - Activity worktag - Gift worktag	Required: Budget #: the budget # mapped to the FDM Worktags in your units submission to UWFT. Revenue Code: “Gift Revenue”	Option 1: the annual \$ value using “evenly” breakback method. Option 2: the calculated quarterly \$ value entered in Sep, Dec, Mar and Jun.
	Method #2 - Alternative FY24 plan vs actuals by only: - Cost Center - Ledger Account - Resource	Required: Budget #: Budget Type/Class Revenue Code: “Gift Revenue” FDM Cost Center or Program value	
Gift Assessment	Same as above.	Same as above, except: Revenue Code: “Gift Assessment”	Option 1: as a NEGATIVE NUMBER , the annual \$ value using “evenly” breakback method.

Scenario	Translation Intent	Adaptive Dimension Entries	Adaptive Timespan Entries
			Option 2: as a NEGATIVE NUMBER , enter the assessment to match the time period/pattern of the revenue
Carryover (for all Non-Core Revenue types)	Not included in FY24 Annual Operating Plan. Rely on reporting sources outside of Adaptive.	n/a	n/a
Gifts to Endowment Principal	Not included in FY24 Annual Operating Plan	n/a	n/a
Gifts in Kind and all other non-cash gifts	Not included in FY24 Annual Operating Plan	n/a	n/a

7.4. Revenue: Grants and Sponsored Projects (Sheet 4)

In general, for the FY24 Operating Budget, revenue from sponsored projects/grants can be aggregated by Budget Type/Class as detail reporting and planning for individual awards is provided through Award Plan functionality in Workday Financials and non-Workday systems like SAGE Budget. Nonetheless the same two options are available to enter either a detailed budget by Budget # or an aggregate budget by Budget Type/Class as outlined in the table below:

Translation Intent	Adaptive Dimension Entries		Adaptive Timespan Entries
	In this Column:	Select this value:	
Method #1 - Primary FY24 plan vs actuals by - Cost Center - Ledger Account - Resource PLUS any of the following: - Program worktag - Assignee worktag - Activity worktag - Grant worktag	Required: Revenue Code	Grant Revenue	A positive \$ value in the month(s) that matches the expected timing of the expenditures so Revenue and Expense net to Zero.
	Required: Budget Number	The budget number mapped to your desired future state FDM Worktags.	
	Optional: Notes	Any notes that would be helpful to you or your collaborators about the revenue. Notes are not visible anywhere but on this particular Sheet.	
Method #2 - Alternative FY24 plan vs actuals by only: - Cost Center - Ledger Account - Resource	Required: Revenue Code	Grant Revenue	A positive \$ value in the month(s) that matches the expected timing of the expenditures so Revenue and Expense net to Zero.
	Required: Budget Number	The appropriate Budget Type/Class for this expense.	
	Required: FDM-Cost Center	The future-state Cost Center to which this expense belongs.	
	Optional: FDM-Program	If you do not select Cost Center, you must select the Program to which this expense belongs. (NOTE: If a Budget # maps 1:1 to a Program, please do NOT enter Program here, but use Budget # as indicated below. Do not enter both Program and Cost Center. Cost Center will be derived from Program during conversion.)	
	Optional: Notes	Any notes that would be helpful to you or your collaborators about the expense. Notes are not visible anywhere but on this particular Sheet.	

NOTE: Facilities & Administration expense (F&A or ICR) is included on Sheet 6 – Non-Compensation Expenses

7.5. Revenue: Self-Sustaining or Auxiliary (Sheet 4)

Scenario	Translation Intent	Adaptive Dimension Entries	Adaptive Timespan Entries
Sales of goods or services to external (e.g., Non-UW) customers	Method #1 - Primary FY24 plan vs actuals by - Cost Center - Ledger Account - Resource PLUS any of the following: - Program worktag - Assignee worktag - Activity worktag	Required: Budget #: the budget # mapped to the FDM Worktags in your units submission to UWFT. Revenue Code: Use the most appropriate 4-digit revenue code, often in beginning with 94xx.	\$ values in the month(s) that most closely matches the expected timing of receiving the revenue.
	Method #2 - Alternative FY24 plan vs actuals by only: - Cost Center - Ledger Account - Resource	Required: Budget #: Select a Budget Type/Class FDM Cost Center or Program Revenue Code: Use the most appropriate 4-digit revenue code, often in beginning with 94xx.	
Sales of goods or services to internal customer (e.g., another UW unit)	~~Not entered here on Sheet 4. Rather, enter this on Sheet 6 to align with current state posting as a negative expense to object code 21-xx. Will convert to a Revenue ledger account in future state.~~ Enter your sales wherever they post today - CTI on Sheet 6 as 'negative expense' that is a negative \$ entry in the timespan columns; and ISDs on Sheet 4 as 'actual revenue' - that is, a positive number in the timespan columns		
Institutional Overhead	~~Same as above.~~ Enter institutional overhead on Sheet 6 as a negative \$ entry resulting in a reduction of the revenue available to spend – that is, as a negative number in the timespan columns.	Same as above, except: Revenue Code: ~~9420~~ 9440	Option 1: as a NEGATIVE NUMBER , the annual \$ value using “evenly” breakback method. Option 2: as a NEGATIVE NUMBER , enter the \$ to match the time period/pattern of the revenue
Carryover (for all Non-Core Revenue types)	Not included in FY24 Annual Operating Plan. Rely on reporting sources outside of Adaptive.	n/a	n/a

7.6. Compensation Expense: Position Management (Sheet 8 or 10)

7.6.1. HRP Staffing Model

UW's human resource and payroll system Workday HCM (Human Capital Management) employs two distinct staffing models. Staffing models in Workday support, in part, the management of a position's lifespan. The **job management** staffing model, used for student positions, for example, results in positions that only exist when filled. By comparison, in the **position management** staffing model, positions persist whether filled or unfilled.

7.6.2. Planning Expectation vs. Actual Data Load

Position budgeting expects that every job in the Position Management staffing model will have a complete budget by month by funding source. Data has been extracted from HCM and loaded into Sheet 8 so that units begin with a baseline of existing positions – filled and unfilled – as of the pay period ending 9/30/2022. Due to limitations in the data and the extract process, some position data loaded may not be accurate or complete. The data provided is meant only as a guide and a starting point. Units are encouraged to reference other sources to confirm every position has a budget in Adaptive R1. ~~When a position exists but was not loaded into Sheet 8, units should include these positions as “New Positions” on Sheet 10. See the table below for more specific detail.~~ When a position in position management exists but was not populated into sheet 8 units should add the position onto Sheet 8. See the table below for more specific details. When a Position ID does not exist in Adaptive units should include these positions as “New Positions” on Sheet 10.

7.6.3. Suggested Approach - Data Entry

Due to page limitations, the table below does not break out each scenario into Translation methods as prior tables do. Rather, it spells out in more detail the suggested data entry for different common position planning scenarios. Both translation methods still apply and units will enter on each row on Sheet 8 or 10 a Budget # for Method #1 or both a Budget Type/Class and FDM Cost Center or Program value for Method #2.

Sheet 8 Scenarios	Adaptive Dimension Entries		Adaptive Timespan Entries
	In this Column:	Select this value:	
Existing Position with * no change to funding source or split AND * no change to employee in the position OR * is currently vacant with planned new employee hire date	Required: Position ID	Pre-filled, no entry required.	A percentage (%) representing the portion of FTE paid on this Budget # or Budget Type/Class funding source. (Note for part-time position, this should equal <100%)
	Optional: Position Title, Employee ID, Employee Name	Note: If employee will be a new hire to the UW, you will not be able to add Employee ID or Employee Name	
	Required: Budget Number	Pre-filled based on costing allocation data in Workday HRP as of the PPE 9/30/22. Keep as is, if accurate, or change to a new Budget # or a Budget Type/Class and FDM Cost Center or Program value, depending on your choice of translation method.	
	Required: Object Code, Job Profile	Pre-filled, no entry required.	

Sheet 8 Scenarios	Adaptive Dimension Entries		Adaptive Timespan Entries
	In this Column:	Select this value:	
	Required: Position Start Date	Enter position start date if position is currently vacant Pre-Filled if Employee iD is assigned to position number	
	Required: Planned Full Time Rate	Pre-filled based on data extracted from HRP for the Pay Period Ending (PPE) 9/30/22. Confirm the pre-filled data is accurate, or change it to be the correct rate for planning.	
	Optional: All other fields		
Existing Position with Additional funding splits	All fields the same as above except: Budget Number	Using COPY ROW, keep all other fields as populated, and add the additional funding split by select the appropriate Budget # of Budget Type/Class and FDM Cost Center or Program value.	A percentage (%) representing the portion of FTE paid on this Budget # or Budget Type/Class funding source. (Note all splits entered should match the position FTE. For part-time positions, this should equal <100%)
Existing Position with Planned vacancy	All columns above	No changes to any columns, except consider adding a note describing the expected vacant period in the NOTES column.	Leave timespan columns blank for the planned months of the vacancy so that salary and fringe do not calculate
Existing Position with Planned new hire @ the same Full Time Monthly Rate as pre-loaded		FOR THE INCUMBENT in the position	A percentage (%) representing the portion of FTE paid on this budget # of Budget Type/class. The start and end dates will pro-rate based on the FTE % entered (e.g., a position with 9/15 end date and 100% FTE would calc 50% salary paid (9/1 – 9/15 x 100%), whereas with 50% FTE, would calc 25% salary paid (9/1 – 9/15 x 50%).
	All columns above, plus...		
	Necessary for this scenario: Allocation End Date	For the row with the incumbent's data, enter the termination date in the allocation end date column. This will pro-rate the salary for whatever portion of the month is paid before the separation.	
		FOR THE NEW HIRE, use COPY ROW to copy the row for the incumbent into a new row for the new hire that you can edit...	
	Necessary for this scenario: Position Start Date	For the row with the new hire data, enter the start date of the new hire. This will pro-rate the salary for whatever portion of the month is paid in the new hire's first month.	
	Required: Planned Full Time Rate	Pre-filled based on data extracted from HRP for the Pay Period Ending (PPE) 9/30/22. Confirm the pre-filled data is accurate or change it to be the correct rate for planning.	
	Employee ID, Employee	If the new hire is known and hire is approved, you may enter the Employee info. Otherwise, leave blank.	

Sheet 8 Scenarios	Adaptive Dimension Entries		Adaptive Timespan Entries
	In this Column:	Select this value:	
Existing Position with Planned comp change that is unique and specific to that position (e.g., NOT a Union wide Increase or a Merit increase)	Incremental Increase %	Enter the planned compensation change as a % value.	No change.
	Incremental Increase date	The effective date of the planned compensation change	No change.
	Increase Frequency	Select "One Time" to have the increase occur ONLY in FY24. (e.g., an in-grade promotion) Select "Yearly" to have the increase occur every year from FY24 through FY26 (e.g., an annual increment step increase)	No change.
Existing Position ID but was not loaded into Sheet 8	Required: Position ID	Enter in existing Position ID Position Title will automatically populate	A percentage (%) representing the portion of FTE paid on this Budget # or Budget Type/Class funding source. (Note for part-time position, this should equal <100%)
	Required: Employee ID	Enter existing incumbent Employee ID Employee Name will automatically populate	
	Required: Budget Number	Select/enter the appropriate Budget # Budget Type Class will automatically populate	
	Required: Object Code, Job Profile	Enter appropriate object code and job profile for existing incumbent	
	Required for this scenario: Position Start Date	Enter incumbent start date into this position, without a start date the salary will not be calculated	
	Required: Planned Full Time Rate	Enter current FT base pay salary	
	Optional: All other fields		

7.7. Compensation Expense: Job Management Pools and Non-Reg pay for Position Management (Sheet 9)

Sheet 9 is used for two related, but different purposes and differs from the other Compensation entry sheets in that timespan entries are dollars, not FTE funding percentages. Sheet 9 was designed to enable budgeting by lump sum totals for groupings of similar expenses, or pools. The two main pools would be for

- Reg Pay for all workers who hold a position in a single Job Profile when those positions are in the Job Management staffing model in HRP (see sections 4.4 and 7.6.1 for more on Staffing Model).
- Earn Types other than Reg Pay paid to workers who hold a position that is in the Position Management staffing model in HRP – to be added to the Reg Pay entries made for these Positions on Sheet 8 and/or Sheet 10.

It is suggested that both categories above are budgeted as pools, where possible. If an earn type does need to be associated with a Position rather than a Job Profile pool, you may enter this also on Sheet 9.



Sheet 9 Scenarios	Adaptive Dimension Entries		Adaptive Timespan Entries
	In this Column:	Select this value:	
A pool for workers who hold positions in Job Management	NOT Required: Position ID	Since you are entering a pool, there is no single Position ID to associate with the dollars entered in this row – leave this field blank.	Calculate the total pool salary expense \$ and enter by month. An annual lump sum can be spread evenly across 12 months using breakback. Do not include, fringe as it will calculate automatically based on the Object/Sub-Object code entered on each line. In the rare cases of a Job Management pool that are merit eligible or eligible for an annual pay increase due to the terms of a specific Collective Bargaining Agreement (CBA), please calc these increases using local data and insight and enter the final \$ in the timespan.
	Required: Job Profile	Select or enter the Job Profile for the pool of workers/positions you wish to enter on this line of the sheet.	
	Required: Object Code	Select or enter the Object/Sub-Object code that best matches the type of earning for this pool. Often this will be 01-80.	
	Required: Budget Number	For translation Method #1 – select the Budget # that represents the funding source for this expense. For translation Method #2 – select a Budget Type/Class that represents the funding source for this expense Method #2 also requires a value to be entered in FDM Cost Center or Program (but not both) fields.	
	Optional: Full Time Pay Rate, FTE,	This field can be used if you'd like to "show your work" for how you calculated the expense \$ of this pool: Avg Pay Rate x # of FTE = Total Pool Expense Entries here are not used in any calculation and are reference only. This calculation can also be used to analyze variance when we get to R2 Budget vs. Actual reports... a higher avg pay rate or more FTE can be drivers that increase actual costs over your planned costs, for example. FTE entered here can be included in reports showing FTE.	
	Optional: Earn Type	Select the best category for the pay for this pool. Entry here enables reporting by Earn type group.	
Non-Reg pay pool for a Job Profile in Position Management	Same as above	Use Case could be all over-time expected for staff. Instead of entering position by position, a lump sum for the pool for all OT by Job Profile is acceptable. Similarly, if your unit has a large population of Classified staff, you may pool certain increases here like the annual increment step increase or other incentive pay as listed in the CBA.	Same as above.
Non-Reg pay for a specific Position.	Same as above except for: Position ID	Use Case: entering ADS or allowance for a Dean To budget for a specific type of non-reg pay for a specific position, you must enter the Position ID in order for that pay to be associated to that Position in reports.	Enter the \$'s paid in the months the payment is expected to happen.

7.8. Compensation Expense: New Positions and New Hires (Sheet 10)

Use Sheet 10 to enter budget data for ~~positions not included on Sheet 8~~ new positions yet to be created in HCM, ~~or new hires into positions for which you want to adjust the Full Time Monthly Rate.~~

Special Notes for this Sheet:

- ~~Unless you know the Position ID,~~ You will use “NEW POSITION” in the Position ID field.
- A Job Profile is required if you want enterprise compensation increase assumptions to calculate.
- Other HCM fields left blank may impact reporting or show up in Adaptive R1 reports in an “uncategorized” grouping. (e.g., “Earn Type (Uncategorized)”)

Sheet 10 Scenario	Adaptive Dimension Entries		Adaptive Timespan Entries
	In this Column:	Select this value:	
For new planned position where Position Number does not exist in Adaptive and where employee will be assigned to Position Management	Required: Position ID	Since you are entering a new position that does not exist in Adaptive enter NEW POSITION	A percentage (%) representing the portion of FTE paid on this Budget # or Budget Type/Class funding source. (Note for part-time position, this should equal <100%)
	Required: Object Code	Select or enter the Object/Sub-Object code that matches the job profile	
	Required: Job Profile	Select or enter the Job Profile for this new position	
	Required: Position Start Date	Enter the planned start date for this new position.	
	Required: Budget Number	For translation Method #1 – select the Budget # that represents the funding source for this expense. For translation Method #2 – select a Budget Type/Class that represents the funding source for this expense Method #2 also requires a value to be entered in FDM Cost Center or Program (but not both) fields.	
	Required: Full Time Base Pay Rate	Enter planned current FT base pay salary	
	Optional: All other fields		

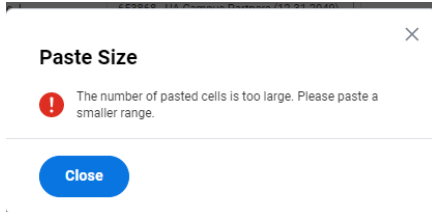
7.9. Planned Usage of GOF/DOF Carryover (Sheet 5) – SHEET REMOVED FROM PROCESS

Update 12/16/22: Sheet 5 has been removed from the FY2024 planning process and replaced with two yes/no and short answer questions within the online narrative response submission tool. Please review the complete list of questions asked on the [FY2024 Operating Budget Development Materials website](#) for details.

8. Known Limitations

8.1. Data Entry Issues

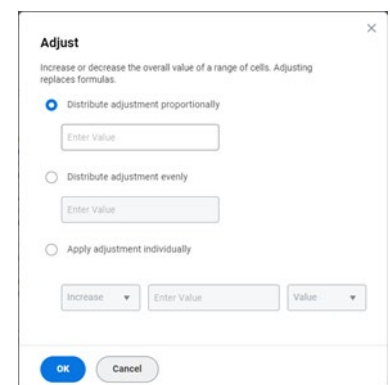
- 1) **COPY/PASTE FROM EXCEL.** When copying and pasting from Excel into an Adaptive Sheet, you may get an error message like this:



To avoid or clear this error, scroll down in your browser to the last row and then back up before pasting your values. This will “load” that row into Adaptive so that it becomes available to accept the pasted value.

- 2) **TO ADJUST BUDGET VALUE UP/DOWN FROM A BASELINE VALUE.** Use the “Adjust” functionality rather than a formula in your timespan cells to increase future year values based on historical or baseline values. Select a timespan cell or range of cells that contain a numerical value, right click and select Adjust from the context menu. Use the method that best aligns with your intent:

- a. Distribute adjustment proportionally – will distribute a lump sum proportionally to all contributing cells based on the numerical value already in the cell.
- b. Distribute adjustment evenly – will distribute a lump sum equally to all contributing cells.
- c. Apply adjustment individually – will distribute a % value or a numerical value to one by one to each contributing cell.



- 3) **DO NOT COPY ROW on SHEET 4 or SHEET 6.** While technically possible to copy a row on Sheet 4 – Non-Core Revenue and Sheet 6 – Non-Comp Expenses, doing so will duplicate the actual values that have been loaded into FY22 thus overstating FY22 values. Instead data entry methods should be limited to “Add Row” or units should enter timespan \$ values in an existing row.
- 4) **SOME DATA MUST BE REFERENCED OUTSIDE ADAPTIVE.** Sheets 1, 2, 3, 9 and 10 are all “zero basis” sheets in that there is no pre-loaded “actual” or “historical” data loaded. Units are expected to click “Add Row” to populate these parts of their budgets. Often, units will need to reference data from systems other than Adaptive in order to populate these sheets.

8.2. FTE funding % math is not the same as Costing Allocation Math.

1) Part-time Workers.

- a. Costing Allocation math is different than FTE Funding % math as entered in the Timespan columns on Sheets 8 and 10. Notably, Costing Allocations always add up to 100%. Timespan entry should always add up to the FTE of that funding %. (See example for Positions 1, 2, and 3 below)

			Sheet 8 & 10 Timespan Entry	HRP Costing Allocation
Position ID	Position FTE	Budget Number	Jun-2024	Jun-2024
PN-001xxxx	0.50	06-04xx - My Unit's GOF Budget #	25.00%	50.00%
		64-1xxx - My Unit's Gift Budget #	25.00%	50.00%
		Subtotal	50.00%	100.00%
PN-002xxxx	0.75	06-04xx - My Unit's GOF Budget #	50.00%	66.67%
		64-1xxx - My Unit's Gift Budget #	25.00%	33.33%
		Subtotal	75.00%	100.00%
PN-003xxxx	0.80	06-04xx - My Unit's GOF Budget #	40.00%	50.00%
		64-1xxx - My Unit's Gift Budget #	40.00%	50.00%
		Subtotal	80.00%	100.00%

9. How to Submit Your Operating Budget Proposal to OPB by March 17, 2023

9.1. Using Workflow

You may choose to use Adaptive delivered Workflow functionality to review and submit your unit's operating budget proposals to OPB. Working 10-digit org code level by 10-digit org code level you and the planners in your unit can submit, review, and approve budgets up the level hierarchy. Alternatively, you can submit, review, and approve at a higher level, up to the highest Level to which you've been granted access (for most, the 3-digit org code level). Use of this functionality will lock your budgets to protect them from any changes after approval and will serve as a notification to OPB that your budget proposals are complete.

9.2. Not Using Workflow

Alternatively, you may take no action and at the March 17th deadline, when OPB locks the budget for all – regardless of what Workflow status is then in effect – your budget proposal will be considered submitted to OPB.

10. Operating Budget Narrative Response

Akin to previous budget development cycles, all academy units/campuses are required to respond to several narrative questions related to programmatic and fiscal health. The purpose of this exercise is to tie strategic plan, personnel changes, enrollment shifts, and fiscal sustainability to the financial figures submitted via the Workday Adaptive Planning tool.

All narrative responses are to be completed within a Word template provided on OPB's FY24 Operating Budget Development materials website. Submission of the completed templates is performed by initiating and completing the Operating Budget Narrative Response submission portal. Units/Campuses are encouraged to limit prose as much as possible and utilize materials that have been previously created to cut down on duplicative or rework necessary to complete this process.

11. Multi-Dimensional Planning Tools and Resources – Tableau Dashboards

Institutional data and analytical reports have been published to OPB's Tableau Site. These reports provide unit level information relating to student and faculty activity. Currently, only Dean/VP's office administrators have access to this tool. **You must be logged into the UW VPN in order to access this site if working remotely.**



11.1. Delaware Cost Study Tableau Dashboards (DCS Deans Dashboards)

- A [set of dashboards](#) that allow users to examine unit level instructional activity as broadly compared to similar disciplines at other AAU institutions (using the Delaware Study methodology).
- Each discipline and departmental budget (using seven-digit financial organization code) has been mapped to a classification of instructional program (CIP) code (at the 4-digit level) for institutional comparisons.
- Available Filters: Unit (3-digit org), Division/Sub College (5-digit org), CIP Name (4-digit mapping from one or more academic disciplines and 7-digit orgs)
- Exclusions: Currently, Delaware submissions are campus specific. These dashboards display data from the UW in Seattle submission. Additionally, Delaware excludes CIPs from Dentistry and Medicine. For these units, please use appropriate information you have locally to respond to the narrative component on teaching activity.

11.2. ABB Current Year Actuals

- A [set of dashboards](#) based on student activity and revenue distribution according to the ABB Tuition formulae.
- The first three dashboard stories provide a high-level overview of the model. First from Gross to Net Operating Fee Revenue and following with details specific to tuition categories and schools/colleges.
- The remaining four dashboards allow users to filter down to explore trends in SCH, Undergraduate Degrees, and Graduate Majors.