The references included were drawn from the documents received and processed to date by the ERIC Clearinghouse on Educational Facilities. The thirteen documents include treatments of the following areas:  
(1) the financial planning phase of a total campus plan, (2) legislative control, (3) allocation formulae, (4) the unit cost approach, (5) construction financing for academic facilities and student housing, (6) land acquisition, and (7) the role of the department of physical plant. (FS)
PLANNING IN HIGHER EDUCATION

An Interpretive Bibliography in Six Parts

Part V

FINANCIAL ASPECTS OF HIGHER EDUCATION PLANNING
PLANNING IN HIGHER EDUCATION

An Interpretive Bibliography

Part V

FINANCIAL ASPECTS OF HIGHER EDUCATION PLANNING

Prepared By

Norman P. Isler

Subject Area Coordinator

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ERIC Clearinghouse on Educational Facilities

The University of Wisconsin

Madison, Wisconsin

November 1969
FOREWORD

The Educational Resources Information Center - Clearinghouse on Educational Facilities (ERIC/CEF) is a clearinghouse of information about sites, buildings and equipment used for educational purposes; included are the efficiency and effectiveness of activities such as planning, financing, utilizing, and evaluating educational facilities.

ERIC/CEF is part of a national network of 19 clearinghouses each covering a different field of educational research. The information from all these clearinghouses is reported monthly in RESEARCH IN EDUCATION (RIE), a publication of the U.S. Government Printing Office (annual subscription: domestic $21.00, foreign $26.25).

Many of the documents reported in RIE are available from the ERIC Document Reproduction Service. This service is currently provided by the National Cash Register Company, 4936 Fairmont Ave., Bethesda, Maryland 20014. Individual documents may be obtained on microfiche at 25¢ for each 57 pages or fewer. Facsimile documents are available at approximately 5¢ per page. Standing orders of all documents related to certain topics are available at 8.4 cents per fiche.

Since January, 1968 approximately 900 documents have been submitted by ERIC/CEF for inclusion in RIE. In addition, approximately 3,000 documents have been accumulated in a local collection which will serve more specialized interests. While the clearinghouse collection does include textbooks, dissertations, and journal articles, the prime mission of ERIC/CEF is to locate and report on documents that are not well known nor widely distributed.

In performing subject searches of RIE, researchers should correlate its use with the Thesaurus of ERIC Descriptors. Descriptors are technically meaningful terms or short phrases that are used to characterize a document and which may also be used as index entries. Descriptors perform a dual function in a storage and retrieval system. First, they permit the indexer to describe the subject elements of the document so that it may be stored in a system for future search and retrieval purposes. Second, they represent the raw material from which a searcher may construct a question for the system to answer. The descriptors used to generate this particular bibliography were: Campus Planning; College Buildings; and College Planning. Any documents in the ERIC/CEF collection which had been indexed using one or more of the aforementioned descriptors were initial candidates for the bibliography. These documents were further screened for applicability and quality and then organized into sections according to content.
The references contained herein are drawn from the documents received and processed to date by ERIC/CEF. They are not represented as a comprehensive list of information on the subject. However, many of the documents are not widely circulated and are therefore useful in expanding existing information.
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(2) If the document has not been processed by ERIC it will not have an ED number and may be secured directly from the source given. This information is printed at the bottom of each applicable page of the bibliography.
FINANCIAL ASPECTS OF HIGHER EDUCATION PLANNING

A set of 13 references to documents which include treatments of the following areas: the financial planning phase of a total campus plan, legislative control, allocation formulae, the unit cost approach, construction financing for academic facilities and student housing, land acquisition, and the role of the department of physical plant.
GUIDELINES FOR PLANNING IN COLLEGES AND UNIVERSITIES, VOLUME Two-MANAGEMENT AND FINANCIAL PLANNING

PUBLISHED-JUL68

128 PAGES


The second of a five volume series concerned with higher educational planning. Techniques and details involved in developing the management and program planning and financial planning phases of the total planning system are presented. The presentation is divided into three sections entitled management and program planning, organization for planning, and financial planning. The first section discusses institutional objectives, planning reports - organizational units, and the management planning process. The second part outlines basic considerations, development and staffing, and the position of the planning administrator. The final section relates to cost and income models and planning programming and budgeting. Graphs and flowcharts illustrate themes developed. The appendix contains 26 sample forms for historical, projection, and requirements analysis. (N1)
How Does the State Control Campus Planning. A Report to the Academic Senate

By Martin, Dikran and Hansen, Michael P.

Published Nov 68

Available from Dikran Martin College of Marin, Kentfield, Calif. 94904

065 Pages

Descriptors: *Campus Planning, Construction Programs, Facility Expansion, Facility Requirements, State Federal Aid, Capital Outlay (for Fixed Assets), Higher Education, State Standards

The control of campus planning by the State of California is cited as being accomplished by control of both state and federal capital outlay funding by making public institutions of higher education comply with certain campus planning dictates which are set down in a document entitled Space and Utilization Standards, California Public Higher Education. Institutions who must comply with the document are identified, and answers to the following questions are presented—(1) How does the State define efficiency and utilization, (2) How much space is allowed the faculty member and his students, (3) What is the state allocation for faculty offices, (4) How much do such standards actually affect fundamental thinking with regard to campus planning, and (5) How is the money allocated. (FS)
UNIT COST APPROACH TO ESTIMATING

PUBLISHED—MAY 66

0CB PAGES

DESCRIPTORS—COLLEGE PLANNING, CONSTRUCTION COSTS, ESTIMATED COSTS, PHYSICAL FACILITIES, UNIT COSTS, BUILDING CONVERSION, FACILITY EXPANSION, FACILITY IMPROVEMENT, HIGHER EDUCATION, SPEECHES

UNIT COST ESTIMATING DONE BY THE PHYSICAL PLANT DEPARTMENT CAN AID IN THE PROCESS OF PLANNING, COST REDUCTION AND JOB CONTROL AT A COLLEGE OR UNIVERSITY. COST ESTIMATING IS AIDED BY DEVELOPING A COST BOOK BASED UPON STRUCTURAL CATEGORIES SUCH AS FLOORING, FOUNDATIONS, ELECTRICAL SYSTEMS, ETC. RATHER THAN MATERIAL AND LABOR CATEGORIES. UNIT COSTS ARE DETERMINED BY ADDING FACTORS OF LOCATION, SITE CONDITION, AND GENERAL INTERFERENCE EXTRA COSTS TO THE STANDARD COST. COST DATA STANDARDS FOR HEATING AND VENTILATION WERE NOT YET COMPILED. THE ARTICLE CONTAINS EXAMPLES HELPFUL IN THE COMPILATION OF A COST BOOK. THIS ARTICLE IS CONTAINED IN THE MINUTES OF THE 53RD ANNUAL MEETING OF THE NATIONAL ASSOCIATION OF PHYSICAL PLANT ADMINISTRATORS. (JP)

Availability:
John H. Sweitzer, Secy-Treasurer
National Assoc. of Physical Plant Administrators
Earlham College
Richmond, Indiana 47374
UNIT COSTS OF INSTRUCTION IN HIGHER EDUCATION

BY- TYNDALE, D. GORDON AND BARNES, GRANT A.

PUBLISHED-DEC62
IN- THE JOURNAL OF EXPERIMENTAL EDUCATION, VOL. 31, NO. 2,
DECEMBER 1962


THE PURPOSES, NATURE OF, AND USES OF UNIT COST STUDIES IN HIGHER EDUCATION ARE DISCUSSED, AND THE NEED FOR OBJECTIVE MEASURES AND STANDARDS IN BUDGETING, PLANNING, AND DAY TO DAY MANAGEMENT IS STRESSED. UNIT COSTS OF INSTRUCTION ARE DEFINED AS THE COST PER SOME SPECIFIED UNIT OF PROVIDING INSTRUCTION. THIS COST IS ACHIEVED BY SPECIFYING AN ARBITRARY BUT ACCEPTABLE WORK WEEK, TAKING TEACHING TIME AS A FRACTION OF THAT WORK WEEK, AND APPLYING THAT FRACTION TO THE HOURLY SALARY RATE. THE FORMULA WAS BASED ON A DETAILED STUDY OF FACULTY TIME DISTRIBUTION. RESPONSES REVEALED THE RATIO OF PREPARATION TIME TO CONTACT TIME VARIES ACCORDING TO THE TYPE OF INSTRUCTION BUT IS RELATIVELY CONSTANT AMONG THE SEVERAL DISCIPLINES. THE FACULTY TIME SURVEY YIELDS A SET OF RATIOS WHICH MAY BE APPLIED TO EACH COURSE OFFERING IN ORDER TO DETERMINE THE TIME CONSUMED IN PREPARING FOR AND TEACHING THE COURSE. THIS IS DONE BY ELECTRONIC DATA PROCESSING. IT IS THEN POSSIBLE TO OBTAIN A CONCRETE AND OBJECTIVE PICTURE OF FACULTY UNIT COSTS FOR INSTRUCTION. USES OF SUCH ANALYSIS ARE SUGGESTED FOR THE BUDGET PROCESS, LONG RANGE FINANCIAL PLANNING FOR NEW AND EMERGING CAMPUSES, AND IN THE DEVELOPMENT OF PROGRAM COSTS. (NI)

Availability:
Dembar Educational Research Services
P.O. Box 1148
Madison, Wisconsin 53701
EXAMINES SOME OF THE PRIVATE SOURCES OF FUNDS FOR COLLEGE AND UNIVERSITY CONSTRUCTION. DISCUSSION IS DIRECTED TO THE LEGAL ASPECTS OF PRIVATE FINANCING AND HOW SOME INSTITUTIONS OF HIGHER EDUCATION ARE APPLYING PRIVATE FUNDS TO THEIR CONSTRUCTION FINANCING. (FS)

Availability:
Mr. Luther C. Callahan, Secretary
Southern Assoc. of College and University Business Officers
University of Alabama
Tuscaloosa, Alabama 35486
CONSTRUCTION FINANCING - GOVERNMENT SOURCE

PUBLISHED-APR 66

014 PAGES


EXAMINES SOME OF THE GOVERNMENT SOURCES OF FUNDS FOR COLLEGE AND UNIVERSITY CONSTRUCTION. THE COLLEGE HOUSING PROGRAM, THE ACADEMIC FACILITIES PROGRAM, AND THE GRADUATE SCIENCE FACILITIES PROGRAM ARE DISCUSSED WITH REGARD TO THE FOLLOWING - BACKGROUND AND DEVELOPMENT, PURPOSES, FUNDS AVAILABLE, AND METHOD OF OBTAINING FUNDS. (FS)

Availability:

Mr. Luther C. Callahan, Secretary
Southern Assoc. of College and University Business Officers
University of Alabama
Tuscaloosa, Alabama 35486
CAPITAL IMPROVEMENT PLAN FOR STATE ASSISTED INSTITUTIONS OF HIGHER EDUCATION

BY- B KILEY, JOHN MARSHALL
OHIO BOARD OF REGENTS, COLUMBUS

PUBLISHED-AUG67

126 PAGES


MAJOR CAPITAL IMPROVEMENT NEEDS FOR THE YEARS 1967-1973 AT SIXTEEN OHIO STATE-ASSISTED INSTITUTIONS OF HIGHER EDUCATION ARE LISTED. EACH INSTITUTION IS TREATED SEPARATELY UNDER THE CLASSIFICATIONS-(1) STATISTICAL PROFILE, WITH INDIVIDUAL INSTITUTIONAL BREAKDOWNS OF NUMBER OF STUDENTS, AMOUNT OF SPACE, AND NUMBERS OF STAFF, (2) OPERATING FINANCES, AND (3) PROJECT DESCRIPTIONS ALONG WITH THE RECOMMENDED STATE APPROPRIATION FOR EACH PROJECT. PROGRESS REPORTS OF PROJECTS SUPPORTED BY BOND ISSUES OF 1963 AND 1965 FOR TWENTY-ONE STATE-ASSISTED INSTITUTIONS OF HIGHER EDUCATION ARE SUMMARIZED. THE TOTAL COST OF EACH PROJECT IS LISTED ALONG WITH THE AMOUNT CONTRIBUTED BY THE STATE, FOLLOWED BY ITS PRESENT STATUS AND/OR ITS EXPECTED COMPLETION DATE. APPENDICES CONTAIN INSTITUTIONAL CAPACITIES FOR ENROLLMENT GROWTH FROM 1966-1970 AND SPACE STANDARDS FOR NEW FACILITIES. (NI)
SUMMARY OF A RESEARCH REPORT ON FINANCING OF COLLEGE AND UNIVERSITY STUDENT PERMANENT HOUSING

BY: LUNG, JOHN D. AND WEIMER, ARTHUR M.
AMERICAN COUNCIL ON EDUCATION, WASHINGTON, D.C.

PUBLISHED: 57

60 PAGES


THIS IS A SUMMARY OF THE MAJOR FINDINGS FROM DATA COLLECTED BY QUESTIONNAIRE FROM 733 OF 971 FOUR-YEAR ACCREDITED COLLEGES AND UNIVERSITIES. INFORMATION IS GIVEN ON PAST AND ANTICIPATED SOURCES OF FINANCING, NATURE OF COLLEGE AND UNIVERSITY HOUSING DEBT, ENROLLMENT, PARTICIPATION IN COLLEGE HOUSING AND UNIVERSITY HOUSING DEBT, ENROLLMENT, AND PARTICIPATION IN COLLEGE HOUSING LOAN PROGRAM. THE PROJECT DOES NOT APPRAISE THE LOAN PROGRAM.

Availability:
American Council on Education
1795 Massachusetts Avenue N.W.
Washington 6, D.C.
THE PHYSICAL PLANT SHARE OF THE INSTITUTIONAL DOLLAR

BY- THCMSCN, H. S.
NATIONAL ASSN. OF PHYSICAL PLANT ADMINISTRATORS OF UNIVERSITIES
AND COLLEGES

PUBLISHED-MAY66

016 PAGES

DESCRIPTIONS- *COLLEGE BUILDINGS, *COLLEGE PLANNING, *FINANCIAL
NEEDS, *PHYSICAL FACILITIES, *SPEECHES, BUDGETING, COSTS,
FINANCIAL PROBLEMS, PHYSICAL DESIGN NEEDS

A SET OF FIVE SUGGESTIONS AND AN ELABORATION ON EACH POINT
AS TO WHAT THE PHYSICAL PLANT DIRECTOR OF AN INSTITUTION OF
HIGHER EDUCATION SHOULD BE DOING IN ORDER TO JUSTIFY HIS SHARE OF
THE INSTITUTIONAL DOLLAR, IS THE BASIS OF THIS SPEECH. THESE
ARE--(1) INVOLVEMENT IN THE PROCESS OF FORWARD PLANNING, (2) THE
STUDY OF EVERY POSSIBLE METHOD AND PROCEDURE BY WHICH QUANTITY
MEASUREMENTS CAN BE ESTABLISHED WHICH ARE CONVINCING AND
DEFENSIBLE, (3) THE SPENDING OF MONEY FOR THE PURPOSES FOR WHICH
IT WAS INTENDED, (4) EDUCATING, COMMUNICATING, AND INVESTIGATING
ALONG WITH YOUR OWN STAFF, AND (5) KEEPING OF YOUR CHIEF
ADMINISTRATOR INFORMED. TWO GRAPHS ARE INCLUDED WHICH ARE
CONCERNED WITH THE UNIVERSITY OF WASHINGTON'S PHYSICAL PLANT
DEPARTMENT--(1) PREDICTED ELECTRICAL DEMAND AND CONSUMPTION AND
(2) MAXIMUM STEAM DEMAND. (NI)

Availability:
John H. Sweitzer, Secy-Treasurer
National Assoc. of Physical Plant
Administrators
Earlham College
Richmond, Indiana 47374
DEVELOPMENT OF SITE PROGRAMS AND BUDGETS AND A PROCEDURE FOR
ESTABLISHING QUALITY LEVELS AND THE CONTROL OF SITE COSTS AT THE
CAMPUSES OF THE STATE UNIVERSITY OF NEW YORK

STATE UNIVERSITY CONSTRUCTION FUND, ALBANY, NEW YORK

PUBLISHED-JAN66

067 PAGES

DESCRIPTORS—*COLLEGE PLANNING, *ESTIMATED COSTS, *METHODOLOGY,
*PROGRAM DEVELOPMENT, *SITE DEVELOPMENT, COMPREHENSIVE PROGRAMS,
CONSTRUCTION COSTS, METHODS RESEARCH, PROGRAM COSTS, PROGRAM
PLANNING

THIS COMPREHENSIVE CAMPUS PLAN WAS DEVELOPED BY THE NEW YORK
STATE UNIVERSITY CONSTRUCTION FUND WITH THE AID OF SITE
CONSULTANTS. THE PURPOSE OF THE PLAN IS TO PROVIDE A GENERAL SITE
PROGRAM UPON WHICH REALISTIC SITE COST ESTIMATES AND ACTION
PROGRAMS FOR SCHEDULING EACH PROJECT CAN BE BASED. THE
COMPREHENSIVE PLANNING STAGE INCLUDES GUIDES, COMPREHENSIVE
CAMPUS PLANNING, RESEARCH AND DEVELOPMENT. THE SITE PROGRAM STAGE
INCLUDES THE PROGRAM, PREPARATION, TABULATION AND REVIEW OF THE
SITE PROGRAM. THE SITE WORK COST ESTIMATE STAGE FOCUSES ON UNIT
PRICES, DESIGN ELEMENTS, BUDGET TESTING AND EVALUATION OF TESTING
METHOD. THE SUMMARY STAGE DISCUSSES REVIEW AND APPROVAL
PROCEDURES. THE APPENDICES INCLUDE GRAPHICS AND FORMS TO
COMPLEMENT EACH STAGE OF THE PROCEDURE PLAN. (MH)

Availability:
State University Construction Fund
195 Washington Street
Albany, New York
YOU CAN ACCURATELY PREDICT LAND ACQUISITION COSTS

BY: GARRIGAN, RICHARD

PUBLISHED: AUG 1967
IN: COLLEGE AND UNIVERSITY BUSINESS, VOL. 43, NO. 2, AUGUST 1967


Availability:
Harold W. Herman, Editor
1050 Merchandise Mart
Chicago, Illinois 60654
RECOMMENDED PROGRAM FOR HIGHER EDUCATION LAND ACQUISITION IN ADVANCE OF CONSTRUCTION REQUIREMENTS

WISCONSIN COORDINATING COUNCIL FOR HIGHER EDUCATION, MADISON

PUBLISHED-APR66

003 PAGES


POLICY AND PROCEDURE STATEMENTS ARE PRESENTED FOR THE ACQUISITION OF LAND IN ADVANCE OF CONSTRUCTION FOR HIGHER EDUCATION IN WISCONSIN. METHODS OF FINANCING SUCH PURCHASES ARE ALSO SPECIFIED. (FS)