

University Budget Development Committee

University of Wisconsin Oshkosh

Meeting Agenda and Summary

Meeting Time: 9am – 11am
Meeting Date: Saturday, 5 December 2015
Meeting Location: Dempsey 236

Agenda

- ❖ Summary
- ❖ Announcements
 - OIR meeting recap
 - Grad Committee
 - Open forums
 - DT update
 - Phalanx deadlines
- ❖ Discussion topics
 - PBBM/FBBM
 - ABBM/RCM
 - IBM/ZBBM
 - Draft budget processes

Miscellaneous Recommended Readings: (Check your email: various additional readings about RCM, IBM, ZBBM, tuition, costs, and budget model optimization (as .doc or .pdf) were sent in late November or early December.)

<https://www.wisconsin.edu/reports-statistics/information-management/instructional-analysis-information-system/>

<http://rcm.arizona.edu/faq-page>

<https://www.wisconsin.edu/financial-administration/financial-administrative-policies-procedures/fppp/f43-financial-management-of-auxiliary-operations/>

<http://ire.udel.edu/hec/cost/>

Prepared By: Angie Metke and M. Ryan Haley
Date Prepared: 15 December 2015

Summary

Attendees: Ryan Haley, Matt Suwalski, Reginald Parson, Dean Koker, Dean Neal-Boylan, Dean Yeo, Jean Kwaterski, Lori Worm, Nathan Stuart, Bill Wacholtz, Mike Watson

- I. SCH data for allocating revenue.
 - a. Data:
 - i. Preliminary 102 SCH data provided by Mike Watson.
 - ii. In-State student tuition calculations provided by Lori.
 - iii. These do not include fees – only tuition.
 - iv. This data does not include Cost Recovery Program SCH.
 - b. Questions:
 - i. John: where do undeclared students fall?
 1. Mike: Most are put into the College of Letters & Science.
 2. Ryan: We will need to implement a better way to determine major/college choice for students if we utilize this data.
 - ii. John: Instead of doing a 50/50 split of enrollment via College enrolled and College which taught the course, should we look at costs of courses instead?
 1. Ryan: There are multiple options to split enrollment SCH
 - a. General education areas claim they are needed for any student to get into their major.
 - b. Colleges argue that students would not have come to the University if it wasn't for the College they want to enroll in.
 - iii. Bill: Could we get the Cost Recovery SCH data?
 - iv. John: Can we use this data to calculate how much it costs for one student in our College? How much does one student bring into the College?
 1. If we had this data it would be easier to forecast.
 2. Ryan: This may lead to too many matrixes.
 - c. Concerns:
 - i. Reginald: Would future Deans only focus on SCH generation rather than the benefits of the program. Leading to removal of non-revenue generating programs?
 1. Leslie: This may also encourage more inter-disciplinary programs because each college will receive the benefit.
 2. Ryan: This is why we would need strong curricular committees to oversee new programs trying to poach revenue from other colleges.
 - ii. Ryan: There are current misconceptions with the current data we have.
 1. Revenue calculated = 73 M.
 2. This is not our tuition target.

- iii. Ryan: Utilizing this data in a new model would require more resources and we would need to create a mechanism to determine allocations.
 - iv. Committee: There can be constraints on accreditation which limit SCH
 - v. Some areas have the ability to have a large amount of SCH.
- II. Major/Minor Count for allocating GPR.
 - a. Questions:
 - i. Ryan: If we utilized major/minor we would have to determine a tax rate for the revenue-generating areas.
 - 1. New Hampshire used a 15% and 25% rate.
 - b. Concerns:
 - i. Jean: How can we attribute GPR funding to non-instructional units?
 - 1. Nathan: Unless the colleges pay a fee to the non-instructional areas.
 - 2. Ryan: This would be a model similar to Minnesota who funded the Colleges with both PR and GPR and then they were taxed to fund the non-instructional units. A tax was also put on the auxiliaries.
 - c. Next Steps:
 - i. Looking to build off this idea and focus on the basics.
- III. Adjustment Spreadsheet.
 - a. Purpose:
 - i. This would be a way to adjust SCH to answer questions on load, teaching and research.
 - ii. Colleges which require research will have lower teaching loads leading to inhibiting ability to generate SCH.
 - iii. John: This also could be used for my faculty who are taken from teaching in the College and used in other areas on campus; such as LGBTQ, Chancellor's fellow, etc.
 - b. Responses:
 - i. John: Is this necessary since it is more within the College to Department purview?
- IV. Other calculation ideas?
 - a. Time to graduation?
 - b. Bill: We need further variables to work with. This will provide a manageable set of variables for the most comprehensive and defensible set of metrics.
- V. Closing.
 - a. Phalanxes:
 - i. Have reports ready by December 15th – the next Open Forum.
 - b. Grad Council Debriefing:
 - i. They were interested in the mission of Research Enhanced and how a new budget model would support it.
 - ii. Interested in the Cost Recovery split process.
 - c. Next Steps:
 - i. Look further into mono-funding.
 - ii. Further analysis of the Auxiliaries.

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