

University Budget Development Committee

University of Wisconsin Oshkosh
Meeting Agenda and Summary

Meeting Time: 10-11am
Meeting Date: Thursday, 22 October 2015
Meeting Location: Dempsey 236

Agenda

- ❖ Summary
- ❖ Announcements
 - Presentation updates
- ❖ Discussion topics:
 - Budget 101
 - Public no more – chapter 6
 - Nacubo article
- ❖ Standing question up for debate: *Should UW Oshkosh continue to use the current incremental budget model as it currently operates at the university to college/unit level?*
 - What do we need to know in order to answer this question?
- ❖ Walk-ons

Recommended readings:

- Chapter 6 in “Public No More” book
 - http://www.nacubo.org/Business_Officer_Magazine/Magazine_Archives/January_2013/The_Buck_Stops_Elsewhere.html
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Summary

Attendees: Ryan Haley, Julia Hodgen, Jean Kwaterski, Lori Worm, Matt Suwalski, Reginald Parson,

- I. Announcements
 - a. First round of listening sessions completed
 - i. Good discussion generated
 - ii. Lori: What have been some of the stand-out questions?
 1. Response: Fees, why they are implemented for some areas but not for others.

Notice Prepared By: Angie Metke and M. Ryan Haley
Date Prepared: 29 October 2015

2. Matt: Clarification on academic freedom and how it fits in the budget score card
 - a. How will the budget model support academic freedom
 - b. Response: We will try to protect it in the event a new model is chosen.
 3. Reginald: From my area the questions were more about how money is dispersed at the dean and department levels.
- b. Senate Presentation
- i. Good questions and involvement from the Senate. Seemed to go well.
 - ii. Lori: I believe the largest concern was within the colleges regarding cost recovery. But there didn't seem to be any striking concerns.
 - iii. Ryan: There was a question regarding positions.
 1. Response: Positions are not within our purview.
 - iv. Faculty Senate Budget Committee will be resurrected.
- c. UBDC Open Forum Presentations
- i. Others can present in Ryan's stead or alongside Ryan if they want.
 1. No obligation, but if people are interested they can.
 2. No takers.
 - ii. If any committee members notice errors or misinterpretations please notify Ryan.
 1. Jump in if Ryan is misinterpreting a question or concern during the presentations.
 - iii. During presentations Ryan mixes "we" and "I" terms.
 1. Regarding points that have been discussed within the group he commonly uses "we".
 2. If it is an issue that Ryan has primarily looked into he will often use "I", so as not to implicate the entire UBDC.
 3. Jean: I have not noticed it during the presentations. So far you are doing a good job with it.
 4. Lori: Personally, I like when you say "I" because it emphasizes that you are an objective individual and that this committee isn't an "Administrative Services" run initiative.

II. Budget 101

- a. Defer because of limited attendance at this meeting.

III. Questions

- a. Jean: Our tuition revenue target is 60 million dollars. If we are over that target do we get to keep the entire amount?
 - i. Lori: We get the entire tuition, less Seg Fees and other fees. If we are short we have to have UW System take the money out of our tuition account and another account (often PR).
- b. Jean: Does part of our tuition pay for UW System employees?
 - i. Lori: There is a pooled tuition target for the whole System. UW System doesn't generate tuition so part of our pool does fund them along with the allocation they get from the state.
- c. Jean: So even if we increase our enrollment we won't get to keep all of those funds?
 - i. Response: We will get to keep our tuition dollars but there is a possibility that we would have a reduced GPR allocation.

- d. Jean: What is the tuition target used for?
 - i. Response: It is used ensure that each campus meets a target level of enrollment performance.
- e. Jean: Do we know how much per student stays here?
 - i. Response: We generally produce above the tuition target. But there is no calculation which tells us how many students generate how much tuition dollars.
- f. Jean: What I am trying to get at is that our new enrollment management is supposed to increase student enrollment. If student enrollment does increase, what do we get to keep?
 - i. Response: There is no linear formula that will work to tell you how many students we need to get over our tuition target and keep more money.
 - ii. Ryan: This is a great point of needing more information about the tuition target and a related point to define clearly is Budget Authority and how it affects campus.
 - iii. Fred: There are some "large-ideas" that we can look into but we need to emphasize that at a certain level we cannot control what UW System's GPR dispersion system is.

IV. Allocation Master Spreadsheet

- a. Ryan has established a spreadsheet to better understand the university allocations and what programs receive which type of funding.
- b. Under the status quo, many of our programs will be in the mixed tab.
- c. Goal is to try to get as many things on mono-funding as possible.
 - i. I would rather have 10 programs exclusively funded by only Seg Fee or DT rather than a hodgepodge mix of funding sources; the latter is inherently opaque.
- d. Matt: You may want another version of mixed to include PR.
- e. Fred: For an academic college what do you want for colleges to explain how their funds are dispersed?
 - i. Ryan: I don't want it to go down to departments, just keep at the college level.
 - ii. Fred: Colleges will be mixed.
- f. Matt: Possibly use Hybrid and Mixed terms as distinct concepts.
- g. Ryan: We are looking at how it's funded not where it falls under.
- h. Ryan: Fred, Jean, Matt and Reggie look at these spreadsheets and see how you would list these out for programs and funding.
- i. Fred: Could we throw a cost recovery column in?
 - i. Response: Yes

V. How are we feeling about our main question? Do you feel like we are moving towards an answer?

- a. Matt: Will our end result be just one model or a hybrid?
 - i. Ryan: Hybrid will be on the table. Most likely we will not just choose one model without mixing in different flavors of other models.
- b. Reginald: What does tuition pay for if it doesn't pay for instruction/salaries?
 - i. Response: It used to pay for instruction/salaries but with cuts and the current financial climate funding is decreasing where those areas of instruction used to be funded.

- ii. If the academic front has less funding then the support then what are we providing to our students? Is it a quality degree?
- iii. Thinking of our mission, do other budget models help us with that?

VI. Next Time

- a. Budget 101
- b. Public No More
 - i. Try to read it a couple times to help it sink in and generate more discussion questions/comments for next time.