

University Budget Development Committee

University of Wisconsin Oshkosh

Meeting Agenda and Summary

Meeting Time: 11am – 12pm
Meeting Date: Friday, 20 November 2015
Meeting Location: Dempsey 236

Agenda

- ❖ Summary
- ❖ Announcements
 - Update on Budget 101
- ❖ Recap of PBBM (see readings listed below)
- ❖ Discussion topics:
 - RCM (see readings list below)

Recommended readings for PBBM:

Overview:

<http://ipspr.sc.edu/ejournal/performancebudgets.asp>

By State:

<http://www.ncsl.org/research/education/performance-funding.aspx>

South Carolina's experience (at state level):

<http://www.highereducation.org/crosstalk/ct0198/news0198-perform.shtml>

<http://www.highereducation.org/crosstalk/ctbook/update0811-performance.shtml>

http://www.nacubo.org/Products/Online_Publications/MADS/Why_Performance-Based_Funding_Has_Not_Succeeded_in_South_Carolina.html

Nova in Florida:

<http://www.universitybusiness.com/article/benefits-performance-based-budgeting>

UK Experience:

Prepared By: Angie Metke and M. Ryan Haley
Date Prepared: 17 November 2015

<http://www.governing.com/topics/education/gov-performance-based-college-funding-coming-stateside.html>

Portland State:

<http://www.pdx.edu/budget/performance-based-budgeting>

University of Florida System (state level):

http://www.flbog.edu/about/budget/performance_funding.php

Recommended readings for RCM:

Overview:

<http://chronicle.com/article/Colleges-Unleash-the-Deans/151711>

<http://www.tandfonline.com/doi/pdf/10.1080/1360080X.2011.605224>

EAB Case Studies:

http://www.uky.edu/ie/sites/www.uky.edu.ie/files/uploads/EAB_RM_Implementing-a-Responsibility-Center-Management-Budget-Model-Challenges-and-Strategies.pdf

Notre Dame (author):

<http://www.academicimpressions.com/news/tailoring-rcm-model-what-works-you>

Virginia:

<https://www.insidehighered.com/news/2011/10/27/u-virginia-gives-colleges-ability-spend-money-they-generate>

Indiana:

<http://gradworks.umi.com/36/09/3609718.html>

Davis:

<http://budget.ucdavis.edu/budget-model/>

Ohio:

<https://www.ohio.edu/provost/rcm/resources.cfm>

Summary

Attendees: Ryan Haley, Julia Hodgen, Matt Suwalski, Bill Wacholtz, Reginald Parson, Dean Koker, Dean Neal-Boylan, Dean Yeo, Nathan Stuart (Attending for Dean Beyer), Jean Kwaterski, Lori Worm

I. Announcements

- a. Second round of phalanges to divide up the five budget models.
 - i. Groups:
 1. Performance Based and Formula: Fred, John, Julia.
 2. Activity Based and RCM: Reggie, Leslie, Lori & Jean.
 3. Incremental and Zero Based: Nathan/Scott, Matt, & Bill.
 - ii. Deadline: Complete work by the by the end of the semester.
 1. PowerPoint presentation 15 – 20 slides.
 - a. Explanation of model, pro, con, usage, etc.
 2. Goal:
 - a. Local experts in each model.
 - b. Additional summary information for the website.

II. RCM Discussion

- a. Points of Interest:
 - i. Ryan: No matter which model we choose there will need to be a balance of competition and collaboration.
 1. This can be managed through leadership and continuous interaction.
 2. We will need safeguards in the case of a new dean or member of the central administration who refuses to collaborate.
 - a. Bill: This is where we should emphasize more budget aspects during the hiring process for the deans; providing a more selective group from which to choose candidates.
- b. Concerns:
 - i. Ryan: When Universities shift to RCM a large percentage of deans are often replaced (as per EAB).
 1. They often quit because they do not want the budgetary responsibilities or the accountability.
 2. Commonly write anti-RCM papers.
 - ii. Bill: Anti-RCM articles were outdated.
 1. Ryan looking into more up-to-date articles.
 - iii. Reginald/Ryan: Colleges providing more course options in order to poach students for the funds.
 1. Ryan: Tuition splitting is an option.
 - a. If a student is in a general course but is enrolled in a specific college/program. Half goes to the unit of enrollment and half goes to the unit of instruction.
 - b. This does not always have to be a 50/50 split.
 2. Bill: Leadership will need to be a factor in this scenario to guide the process.

- iv. Reginald: Another issue I found was where undecided students will be required to declare an interest in a college. Isn't this pressuring students into making a very important decision?
 - 1. Ryan: This was for the purpose of dispersing funds.
 - 2. A second option would be splitting the undecided students between each college.
- v. Ryan: One competitive aspect which may lead to trouble would be marketing on the success of students. Encouraging students to attend my class because you will receive an easy A.
- vi. Leslie: Would the same concern be of manipulating the credit system?
 - 1. Bill: This may impact us less due to certifying and accrediting agencies.
- vii. Bill: Threats on RCM: What would UWO's unique threats be?
 - 1. Bill: We are one of the most Green Universities in the country.
 - 2. John: We don't have the right/authority to set our own tuition because we are part of a System.
 - a. If we run a program and don't have enough money to fund it we can't raise tuition for those specific programs.
 - b. This will be a threat no matter which model we choose.
 - c. Ryan: A solution to this would be implementing program DT's and vary them based on programs.
 - i. Bill/Jean: DT's must be approved by the Board of Regents before implementation.
 - d. Lori: Auxiliaries have the authority to raise or adjust fees. They could help moving forward.
 - i. Jean: Seg Fee funded programs have rules on how the funds are spent.
 - ii. How could we lower fees if these Auxiliaries run on these fees?
 - 1. Ryan: This is an issue we are facing as a campus, no matter which fund we are referring to.