

TO: Faculty Senate

FROM: University Planning and Budget Committee

DATE: January 15, 2020

SUBJECT: Review of Strategic Plan 2030

The University Planning and Budget Committee (UPBC) is pleased to support and recommend the approval of the Strategic Plan 2030 (SP2030).

Since December of 2018, UPBC, the Strategic Planning Steering Committee (SPSC), Workgroups, and the entire campus community have had the opportunity to participate in the strategic planning process. Our thanks to all who have provided input, especially to the SPSC for thoughtful consideration and implementation of feedback. Upon further review of the revised SP2030 (as of December 10th, 2019), the UPBC examined all changes and additions made as a result of input via UPBC, the University open forum, as well as electronic feedback submitted.

The SPSC developed an Action Plan as a supplementary list of action items that are needed to achieve the goals and objectives of the SP2030. The Action plan is intended to be an agile and fluid document, to enable the University to adapt to changing conditions with decisions being made as to which actions to pursue, which to modify, and on what time-line. The UPBC is pleased that as a result of UPBC feedback and discussions between the UPBC and SPSC that the following two processes will be implemented:

1. In each budget cycle, whereby division heads responsible for goals and objectives identified in the plan will use those items to guide their funding requests and align with University priorities, the UPBC will provide feedback and input to the Integrated Planning Council based on University priorities.
2. To facilitate these responsibilities, the SPSC has agreed to provide an annual progress report on the SP2030 indicating action taken and progress made on each goal as well as updates on approved funding, actual revenue generated and/or actual costs incurred for each goal, as well as a comparison to the financial modeling that was completed as part of this effort.

Lastly, as we concluded our review of the final draft, UPBC focused primarily on the financial modeling and Action Plan items. Specifically, we were concerned with revenue estimates from assumed increases in international enrollment, retention, and changes to the student-to-teaching faculty ratio. Our concerns were fully addressed and satisfied after members of the SPSC provided a more in-depth analysis of the data behind the financial modeling. Please see the following discussion points that were explored in greater detail summarized below that we wish to share with the Senate.

- With regard to Goal 2, Objective 1B: “Implement international recruitment strategy” and the associated revenue increase listed in the financial modeling documents, UPBC requested and received information concerning the feasibility of the projected increase and the costs associated with it.
 - Data analysis indicated that in fall 2015, international student headcount was 281 and has declined to 179 as of fall 2019.
 - This indicates that there is the potential capacity to increase international enrollment without necessarily a need to increase resources to support these students. It will, however, be necessary to monitor the resources for supporting international students to assure their adequacy.

- Concerning the financial modeling proposing to increase revenue by \$16M by improving retention, UPBC requested and received data to determine the improvement necessary and its feasibility.
 - The modeling calls for an increase of 1.5% in retention per year for each cohort as they move from year 1 to year 2, year 2 to year 3, etc. for a total improvement in retention rate of 15% over ten years. Please see the table for a breakdown of the data for retention changes and the number of students.
- In the original draft of the SP2030, an action item associated with Goal 5, Objective 2A read, “Increase the student-to-teaching faculty ratio from 15:1 to 20:1,” and the financial modeling documents included savings of roughly \$35M from this increase. UPBC raised concerns about the student-faculty ratio and using the resultant savings as a funding mechanism for the SP2030 investments. Our concerns lead to removing language about student-faculty ratio and resulted in changing the focus of the objective to “Optimize the efficiency of our use of faculty resources where possible to serve the needs of our students, without compromising academic excellence and educational quality.”
 - While we appreciate this change, we remain concerned that the revenue projection based on the projected efficiencies remains \$35M and that the mechanism for realizing these revenues is the same: reducing the number of sections offered. To evaluate the likelihood that some amount of savings could be achieved through section reduction, the UPBC requested a more detailed analysis of sections offered in the two most recent semesters, Spring 2019 and Fall 2019. The data analyses included the number of sections offered, the maximum seat count and enrollment by section and course. The additional analyses confirmed that there is room for reduction in the number of sections offered. The modeling assumes incremental section reductions over the life of the SP2030. However, the full section reduction in the later years is unlikely, in which case the investment strategy and budgetary decisions will need to be adjusted.
 - Both the SPSC and the UPBC agree that any reduction in sections will need to be explored carefully at the department level in collaboration with Deans and the Provost to ensure academic excellence is maintained. The UPBC appreciates the value of using scheduling efficiencies as one method among others of funding the SP2030; we recommend that the Faculty Senate remains vigilant that those efficiencies do not negatively impact our ability to maintain and enhance academic excellence.

In summary, UPBC supports and endorses the SP2030 goals and objectives and acknowledges the specific items in the supplementary Action Plan and financial modeling are meant to be fluid guides that will evolve and serve as a resource as the UPBC reviews and considers funding requests in future budget cycles in support of the University’s priorities. We look forward to the proposed review process from the SPSC regarding annual updates on each of the five goals, as well as updates on the budget so that the University may move forward strategically and with purpose.

Respectfully Submitted on behalf of the University Planning and Budget Committee,

Jason Melnyk

		SFY 21 cohort 1	SFY 22 cohort 2	SFY 23 cohort 3	SFY24 cohort 4	SFY 25 cohort 5	SFY 26 cohort 6	SFY 27 cohort 7	SFY 28 cohort 8	SFY 29 cohort 9
	3 year average	Improvement	1.50%	per year						
		1.5%	3.0%	4.5%	6.0%	7.5%	9.0%	10.5%	12.0%	13.5%
Retained to 2nd Year	74.7%	75.8%	77.0%	78.1%	79.2%	80.3%	81.5%	82.6%	83.7%	84.8%
Retained to 3rd Year	66.9%	67.9%	68.9%	69.9%	70.9%	71.9%	72.9%	73.9%	74.9%	75.9%
Retained to 4th Year	63.4%	64.3%	65.3%	66.2%	67.2%	68.1%	69.1%	70.0%	71.0%	71.9%
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Retained to 2nd Year	1,016	1,031	1,046	1,061	1,076	1,092	1,107	1,122	1,137	1,153
Retained to 3rd Year	909	923	936	950	964	977	991	1,005	1,018	1,032
Retained to 4th Year	861	874	887	900	913	926	939	951	964	977
Change										
Retained to 2nd Year	-	15	30	46	61	76	91	107	122	137
Retained to 3rd Year	-	14	27	41	55	68	82	95	109	123
Retained to 4th Year	-	13	26	39	52	65	77	90	103	116