

# PBA CONVERSATIONS

October 23, 2018



# DISPELLING A FEW MYTHS



This year's PBA decisions will NOT be made by ABBA dance offs...  
But I am open to reconsideration!



# DISPELLING A FEW MYTHS



I am NOT a Crazy Rich Asian... temper your PBA expectations accordingly...





# DISPELLING A FEW MYTHS



Despite what you may have heard, I CAN be bribed...



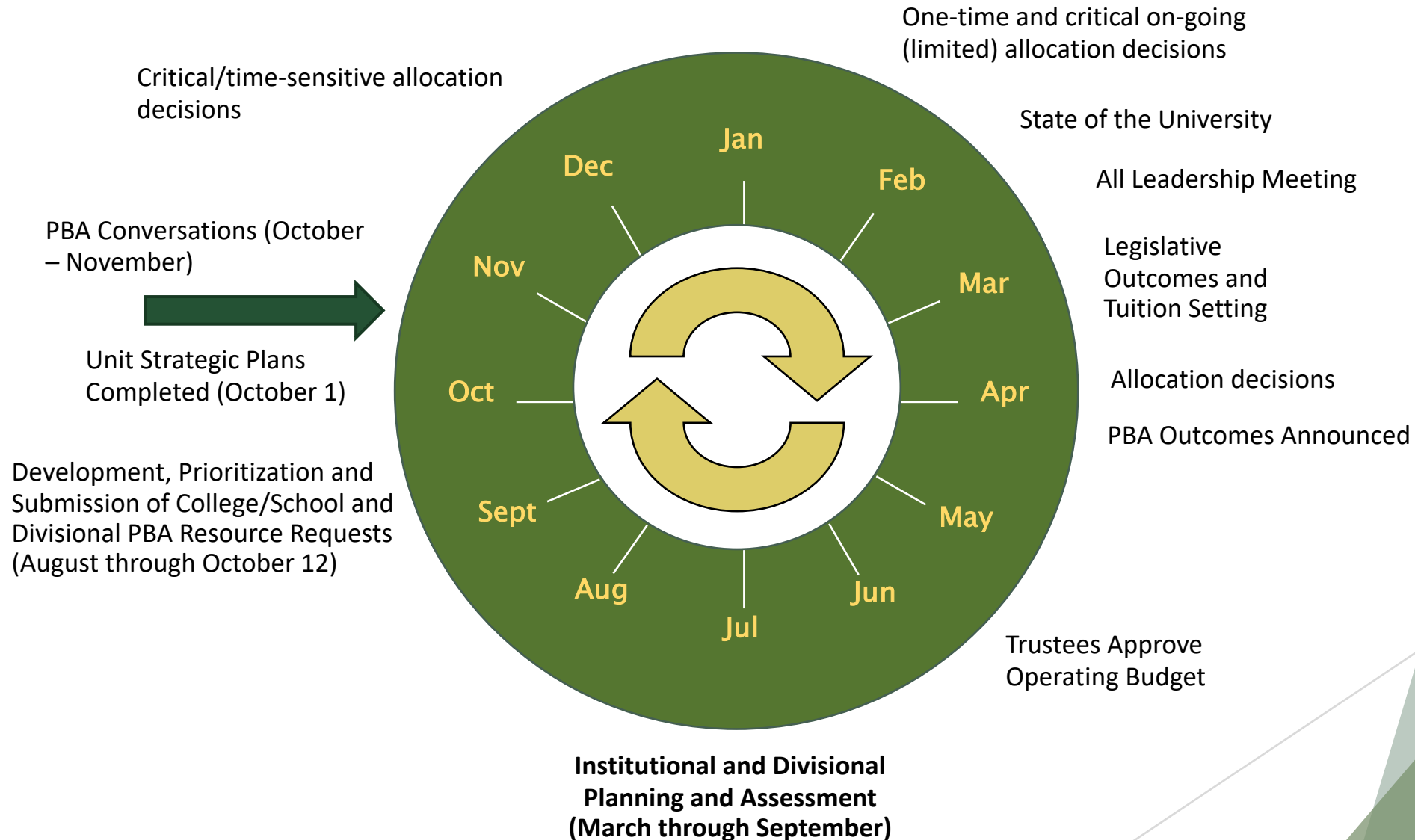
# PBA 15 YEARS STRONG

2003 Task Force Goals for PBA focused on:

- Coordination
- Creation & development of mission supportive initiatives
- Accountability
- Engagement & transparency
- Utilization of goals & objectives
- Inclusion of all revenue sources



# 2018-19 PLANNING, BUDGET & ASSESSMENT (PBA) CYCLE





## UVU Strategic Planning and PBA Process Guide 2018-19

---

*Division of  
Planning, Budget and Human Resources  
March 1, 2018*

### Presidential Planning Guidance

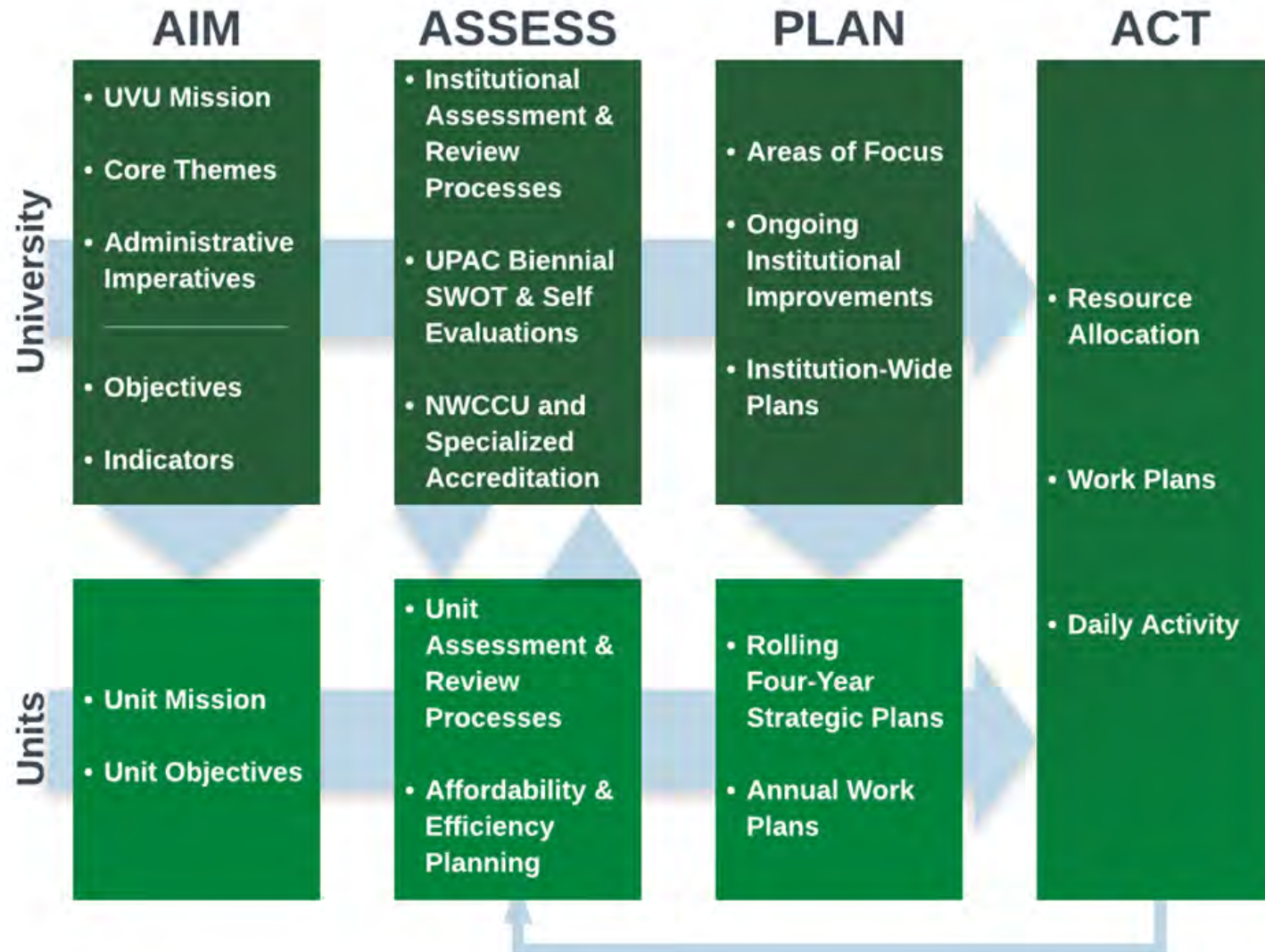
*2018-19 Strategic Planning Guide*



Presented and shared at All Leadership Meeting on March 1, 2018



# PBA PROCESS: PLANNING MODEL





# AREAS OF FOCUS

Improve student retention, persistence, and completion

*Student Success # 1 UVU supports students' preparation and achievement of academic success at the university.*



# AREAS OF FOCUS

Pursue excellence in engaged learning that promotes success in undergraduate scholarship, post-graduation career pursuits, and civic responsibility.

*Engaged #1—UVU faculty and staff engage students using real-world contexts within the curriculum and activities outside the classroom to increase professional competence and confidence.*

*Student Success #3 UVU prepares students for success in their subsequent academic, professional, and lifelong learning pursuits, including serving as leaders, people of integrity, and stewards of their communities*



# AREAS OF FOCUS

Strengthen outreach and internal academic and student support efforts for students from historically underrepresented cultural backgrounds and those who are first-generation and low-income.

*Inclusive #1 UVU provides accessible and equitable educational opportunities and resources for all students.*



# THE PURPOSE OF PBA

The PBA process facilitates the alignment and prioritization of initiatives throughout the university in support of UVU's mission, core themes, and administrative imperatives.

Budget requests are developed and prioritized in support of four-year strategic plans and annually identified university-wide areas of focus.

The PBA conversations provide a public forum to promote collaboration, alignment, integration, and transparency in discussing initiatives, priorities, and the allocation of resources.





# NWCCU Recommendations

Improve the transparency of the planning, budgeting, and assessment process below the executive level due to inconsistent communication across departments, schools, colleges, and administrative units.

*(Standard 3.A.1 and Standard 3.A.2)*



# NWCCU Recommendations

Strengthen the planning and assessment components of the PBA process to ensure the adequacy of its human and financial resources, capacity, and effectiveness of operations to document its ongoing potential to fulfill its mission, accomplish its core theme objectives, and achieve the goals or intended outcomes of its programs and services, wherever offered and however delivered.

(Standard 5.B.1)



# POTENTIAL REVENUE SOURCES

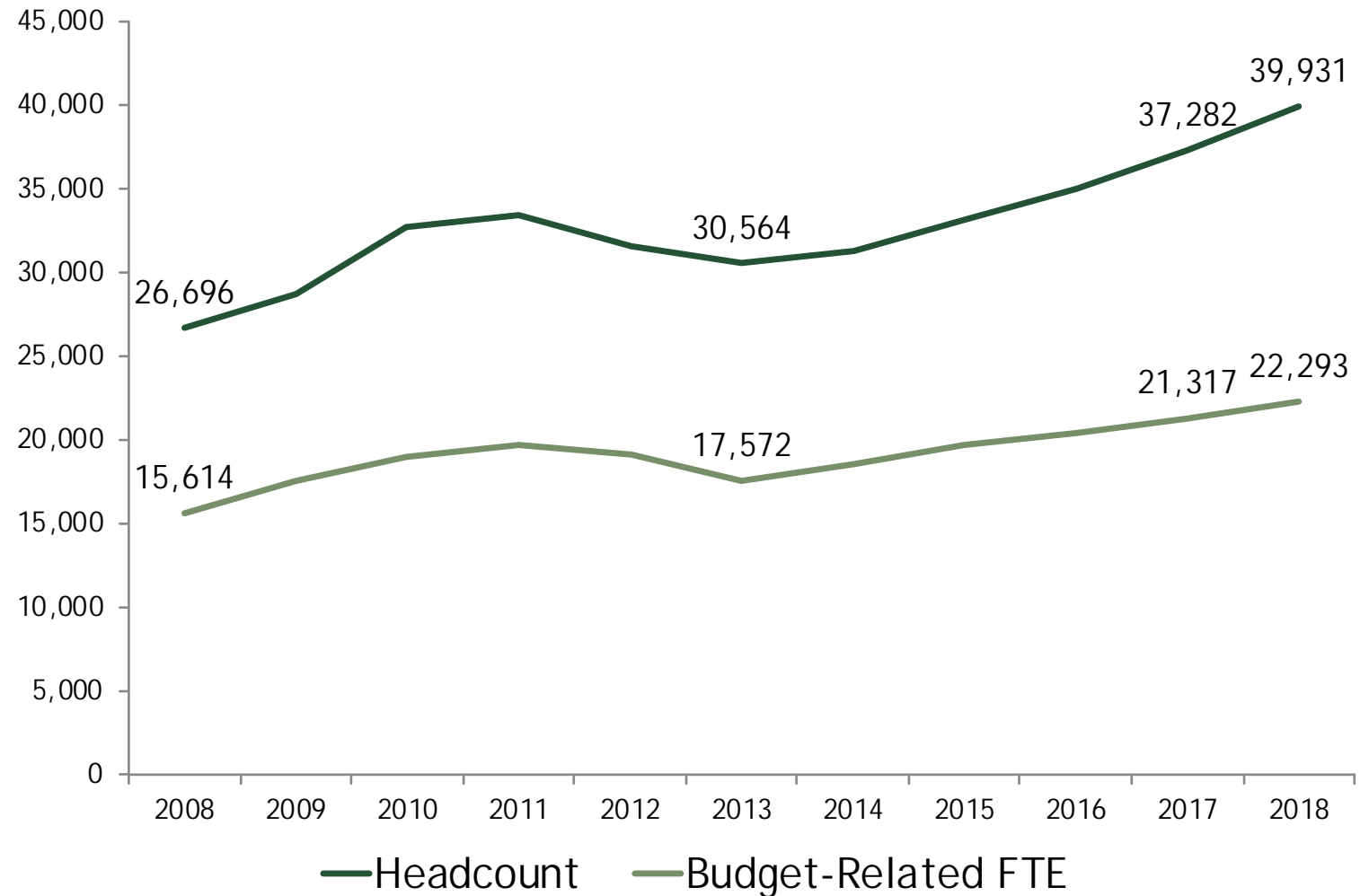
- Tuition from Enrollment Growth
- Tuition from new academic programs
- Tuition increase
- Internal reallocations
- Regents Budget Request
  - Focused on
    - Capacity & Growth, Timely Completion, Workforce, Affordable Access
  - Dependent on
    - Utah economy and tax revenues
    - Regents and legislative priorities



# TUITION REVENUE

- Enrollment-based Tuition
  - Summer and Fall tuition revenue up \$1.8 million
  - Spring Tuition Revenue TBD
- Tuition Rates
  - Generally used for compensation increase match
  - Increased oversight
  - Political pressure for low to no tuition increase

## Fall Enrollment History





# UVU BUDGET REQUESTS

## UVU 2019-20 Budget Request (excludes compensation)

Regents Category/Institutional Requests	Amount Requested
<b>Student Growth &amp; Capacity</b> New Faculty for High Demand, High Growth Programs	\$3,901,800
<b>Affordable Access</b> Institution-based Student Aid, Student Employment, and Internships	\$1,435,200
<b>Timely Completion</b> Advising, Retention, and Student Success Programs	\$1,372,300
<b>Workforce and Research</b> Health Professions and Related Programs	\$639,800
<b>Total Request</b>	<b>\$7,349,100</b>



# UVU BUDGET REQUESTS

Compensation (**High Priority**)

Low unemployment = highly competitive market

## Salary Strategies

- COLA/across-the-board
- Merit Pay (faculty and staff)
- Market Equity
- Internal Equity

Medical premium increase



# TAX FUND OUTLOOK

- National and state elections with impact on political leadership, markets, and economy
- Monetary policy
- Geopolitical unrest and transition
- Robust Utah economy/soft state tax revenues (services v. goods)
- State tax fund competition



# DECISION-MAKING

- Process aligned with legislative intent, commitments during legislative process, and Regents guidelines
- Iterative process involving Vice Presidents, Deans, Associate/Assistant Vice Presidents





# DECISION-MAKING CONSTRAINTS

- Available New Funds
  - 18-19 tuition revenue from growth
  - Projected 19-20 tuition revenue from new undergraduate and graduate programs
  - Tax funds *pending appropriation in March 2019*
  - 2019-20 tuition rate increase *pending approval in March 2019*
- Other Factors
  - Unfunded mandated costs
    - SafeUT app
    - Risk insurance rate increases
    - Attorney general services



# FINANCIAL FRAMEWORK

Established divisional PBA request targets based on *potential* new revenue

## Potential 19-20 New Ongoing Revenue

(Excludes compensation)

### Regents Budget Request

Student Growth & Capacity	\$3,901,800
Affordable Access	\$1,435,200
Timely Completion	\$1,372,300
Workforce and Research	\$639,800

### Other Tax Funds

5 months O&M Noorda	\$486,400
FY19 Performance Based Funds	\$314,300
Summer Tuition	\$800,000
Fall Tuition	\$1,000,000
Spring Tuition	\$1,150,000
New Program Tuition	\$900,000
Tuition Increase	\$1,000,200
<b>TOTAL</b>	<b>\$13,000,000</b>

Division	On-going Request Target	One-time Request Target
Academic Affairs	\$8,231,000	\$8,864,100
Development & Alumni Relations	\$261,500	\$281,600
Finance & Administration	\$2,797,800	\$3,013,000
Planning, Budget & HR	\$279,000	\$300,400
President	\$88,700	\$95,600
Student Affairs	\$1,085,300	\$1,168,800
University Relations	\$256,700	\$276,500
<b>Grand Total</b>	<b>\$13,000,000</b>	<b>\$14,000,000</b>



# PRIORITIZED PBA REQUESTS

## Ongoing

Divisional Appropriated	\$12,935,225
General Appropriated	\$7,607,836
Non-appropriated	<u>\$140,255</u>
<b>Total Ongoing</b>	<b>\$20,683,316</b>

## One-Time

Divisional Appropriated	\$10,795,268
General Appropriated	\$6,598,746
Non-appropriated	<u>\$24,425,000</u>
<b>Total One-Time</b>	<b>\$41,819,014</b>

Positions Requested: 66 staff; 34 faculty



# DISPELLING A FEW MYTHS



Yes, I do have a magic wand... but if I'm going to use it...





# DISPELLING A FEW MYTHS



I'm buying myself a new house!

