## Budget Recalibration Agenda

**March 21, 2017**

10:30 AM - Noon

UWBX M/N

<table>
<thead>
<tr>
<th>Time</th>
<th>Topic</th>
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<tbody>
<tr>
<td>10:30 AM</td>
<td>Strategic Initiatives Report Out</td>
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<tr>
<td>11:00 AM</td>
<td>David Maddox on ABB at UW</td>
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<td>12:00 PM</td>
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Work to Date & Coming Events

- Cabinet Report Out
- EAB Session (will discuss fully next meeting)

Coming:
> Core, March 30th
> Town Hall, March 30th
> Core, April 3rd
> Steering, April 5th
Strategic Initiative Report Out from Core
Brainstormed Criteria for what qualifies/could be considered as a campus level strategic initiative

- Mission related (strategic plan)
- Has campus-wide impact (cannot be restricted or limited to one unit)
- Benefits students, faculty and staff and has a clear audience
- Engages students, faculty, staff, community
- Community impact positive
- Enhances the UW Bothell brand
- Enhances Bothell identity (inclusion, diversity)
- Creates or leverages synergies with other efforts, scalable
- Grant support potential
- Sustainable over time

**Note:** Mandated/compliance initiatives – must dos; consider in same financial pool or different?
What would be needed for vetting such a request?

- Business case/concept scope
- Budget
- Project plan with timeline and milestones
- Has an owner/implementer/champion/accountable party
- Known audience
- Impact on people/community/faculty and students and staff/alumni
- Brand impact
- Sustainability plan (start up, bridge, maintenance over # of years)
- Review plan after implementation
- Metrics/success indicators
- Who’s involved
- Urgency/priority level
- Relates to other initiatives
- Risk management plan

WHAT ELSE?
Ideas for Approval/Implementation processes: Keep it Simple!

- Approval Path
  1. Letter of intent (LOI)/pre-proposal
  2. Initial vetting by subject matter experts (SME) and others (fiscal, programmatic, etc.)
  3. Full proposal if passes through LOI
  4. Review and make recommendations (from review team - TBD)
  5. Recommendations to Chancellor’s Exec Team (CET)
  6. Final decision by Chancellor

- Implementation Path
  - Allocate funds
  - Implement
  - Regular review (budget management, expected impact, milestones)
  - Graduate initiative over time to program
  - Communicating progress: web, emails, etc.
  - Track progress of all initiatives

WHAT ELSE?
ABB at UW

David Maddox
Chief Operating Officer,
Global Innovation Exchange
Reference points

RCM or something like it?
> Vanderbilt
> Chicago
> Washington University St. Louis
> Iowa State
> Davis
> Irvine

RCM light?
- Philadelphia
- Morehouse School of Medicine
- Fort Lewis
Unresolved issues with RCM

> How to create more money
> Power to deans, ambiguity for chairs
> Funding still “out of balance”
> Central pools
> Differences in production functions
> Interdependencies
> Common goods
> Metrics for everyone?
> Data issues
Alternate moves

> Tuition easy
> Many mechanisms to fund central pools
> Efficiency/accountability—contribution and program resource models
> Stronger metrics and visualization
> Focus on interdependencies
> New programs— incentives, shared gain, start up
> Cost allocation discussion
Philadelphia University data analytics and visualization
http://er.educause.edu/articles/2012/7/building-a-performance-analytics-environment
Fort Lewis program resource model

Issues we wanted to address
- Allocation of resources
  - Full-time faculty
  - Adjuncts
- Efficiency of the curriculum
  - Offering more sections than we should?
  - Balance between FT and adjunct
  - Balance of teaching loads across college
  - Correlations between use of adjuncts, workload, course structure, capacity

Model foundation
- Section-level detail
  - Enrollment and listed section capacity
  - Rank, major, accumulated, and status at admission of each student
  - Instructor, rank and home department
- Weighting factor for workload
- Calculated excess capacity
Fort Lewis program resource model

> Outputs
  • Faculty workload and SCH delivered
  • Department profiles—average section sizes FT and adjunct faculty, average faculty workload, excess capacity across course offerings
  • For each major, calculated average number of credits consumed per year across subjects
  • Combined factors into a model that calculated impact on adjunct budget of shifting faculty lines between departments or changing aspects of volume and workload
Messaging for Today