



# Data's Impact on Policy and Institutional Appropriations



---

Utah System of Higher Education

Data Quality Summit

August 3<sup>rd</sup>, 2018


Utah Valley University – Orem, Utah

Presenter: Brian Shuppy

# Reports and Forms



- ☞ Budget Requests – base and 1x, compensation, tuition and fees, vehicles, etc.
- ☞ State reporting – revenue & expenditures, fiscal notes, draw schedules, business cases, COBI, transparency, etc.
- ☞ Implementation & Accountability – cost study, faculty workload, auxiliaries, waiver utilization, cost savings, efficiencies, etc.

 2018 FORM DEADLINES		
DUE DATE	FORM	COMPLETED
January 15	B-3 Revenue Generating Activities 2016-17	
March 8	R-6 Differential Tuition Proposals 2018-19	
March 15	R-2 Student Fee Proposal 2018-19	
	R-4 Tuition Proposal 2018-19	
March 23	Tuition and Fee Schedules 2018-19	
April 13	R-5 National Guard Waivers 2018-19	
	H-3 Medical Benefit Changes 2018-19	
May 2	D-2 Draw Schedules 2018-19	
	H-1 Hearing Impaired 2017-18 (2nd half)	
May 15	LFA Fiscal Note Building Block Follow-up Reports	
May 26	B-1 Institutional Budget Needs	
June 15	B-4 Budget Request Initiatives Update 2018-19	
June 20	A-1 Operating Revenues & Expenditures 2017-18 (Budget)	
	S-10 Employee Benefits 2018-19 (Budget)	
	R-1 Tuition and Waivers 2018-19 (Budget)	
	I-1, I-3, Budget Implementation 2018-19	
	D-1 Foreign Donations 2017-18	
July 18	Enrollment Growth Estimate Fall 2018	
August 1	A-1 Operating Revenues & Expenditures 2017-18 (Short)	
August 15	B-4 Budget Request Initiatives 2019-20	
August 17	B-2 Efficiencies, Reallocations, and Cost Savings 2017-18	
August 23	H-2 Institutional Residence 2017-18	
August 29	L-1 Leases Space 2017-18	
	G-1 Grants and Contracts 2017-18	
October 10	A-1 Operating Revenues & Expenditures 2017-18 (Actual)	
October 11	H81 and LFA COBI Performance Measures	
October 17	S-10 Employee Benefits 2017-18 (Actual)	
	R-1 Tuition and Waivers 2017-18 (Actual)	
	R-3 Waiver Utilization 2017-18	
	S-1 through S-8	
November 3	V-2 Vehicle Expansion 2019-20	
	S-12 Employee FTE Count Fall 2018	
	A-2 Budget Reallocations 2019-20	
November 21	C-2 Cost Study 2017-18	
December 1	C-3 PFDS Financials 2017-18	
	H-1 Hearing Impaired 2018-19 (1st half)	
December 5	S-11 Faculty Workload Fall 2018	
December 29	S-13 Intercollegiate Athletics 2017-18	

Revised: 5/15/2018

# Examples



- ❧ Utah Academic Library Consortium (\$3,410,000)
  - \$3.4 million appropriation
  - Budget related and self supporting student FTE
  - Student FTE by course level
  - Regular and Adjunct faculty FTE
- ❧ Growth and Capacity (\$9,073,800)
  - Budget related resident FTE by course level (incl. voc.)
  - Cost study
  - Tax vs tuition ratios
- ❧ Employee Benefits (\$27,252,700)
  - Salary and benefit increases

# Examples (continued)



## ❧ Hearing Impaired (\$796,300)

Actual program costs determines funding

## ❧ Performance Based (\$3,850,000)

Completions (annual awards)

Underserved students (graduates eligible for Pell)

Market demand (completions in 5-star jobs)

Awards per FTE

Research expenditures

## ❧ Fiscal Note and Budget Item Follow-up Reports

## ❧ Budget Request Initiatives

# Future



- ❧ More accountability and outcomes
- ❧ More emphasis on efficiencies, internal reallocations, and examples of cost savings
- ❧ More data verification
- ❧ More needs analysis
- ❧ More staffing and resources
- ❧ More darts thrown at my picture

# Recent Policy Impacts



## ∞ Tuition Waivers and Reductions (R513)

<https://higheredutah.org/policies/r513-tuition-waivers-and-reductions/>

## ∞ Disclosure of Foreign Donations (R545)

<https://higheredutah.org/r545-disclosure-of-foreign-donations-to-higher-education-institutions/>

## ∞ Revenue Generating Activities (R553)

<https://higheredutah.org/policies/r553-revenue-generating-activities/>

## ∞ Institutional Facilities Space Utilization (R751)

<https://higheredutah.org/policies/r751/>

# Tips and Tricks



- ❧ Prepare and set aside for a later review
- ❧ Compare numbers against prior year if possible
- ❧ Ask a co-worker to review it with one mistake added
- ❧ Share it with other people in draft form
- ❧ Look at raw data using PivotTables etc.
- ❧ Don't let even small data errors slide
- ❧ Fix and clean historical data
- ❧ Footnote and source all reports