

Administrative Unit Name: UW Educational Outreach

Please complete this Word document and the accompanying [Excel workbook](#), and submit them to the Office of Planning & Budgeting on or before **Friday, November 20**. Please email your materials to [Becka Johnson Poppe](#).

1. In spring 2015, Provost Baldasty initiated the Transforming Administration Program (TAP), which encompasses all central administrative units and focuses on fulfilling the need for greater collaboration, clear priorities, increased accountabilities, and elimination of unnecessary bureaucracy and redundancies.

Within a **500 word bulleted list**, please answer both of the following questions:

- **List 3-5 things your unit is doing to align with the [TAP principles for central administrative units](#) and to create and enhance a culture of service. Please be specific.**
 - **In what ways (if any) could your unit leverage activities of other central administrative units to increase efficiency within your unit and/or to streamline activities across the UW? Are there areas of overlap between your unit and another that prompt closer collaboration?**
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UW Educational Outreach by virtue of our self-sustaining financial model and the high value we place upon our close, working relationships with the schools and colleges, has always embraced administrative efficiency, service excellence and tight collaborations benefitting a myriad of campus partners. These ideals are reflected in our mission, vision and core values and are further reinforced in the UWEO Strategic Plan. The plan's four pillars being:

- Grow programs
- Demonstrate and continuously improve program quality and student experience
- Enhance internal and external communications and collaboration
- Develop organizational capacity for innovation and change

Under this four pillars, UWEO has numerous strategic initiatives planned and underway that not only align to the UWEO strategic plan, but also align to the values of the Transforming Administration Program (TAP). We will highlight here only three of those efforts we view as having broad and significant impact to our schools and colleges, UW faculty, UW staff and our global learning community.

- Enhancement of the student digital experience and the expansion of student online services – two major projects:
 - In close collaboration with UW Information Technology, The Graduate School and other campus stakeholders, UWEO is investing heavily in improving the breadth and quality of available student online services.
 - The most notable of these new services is the project underway to open to fee-based students, the existing MyUW student registration processes available to tuition-based students. We are also exploring the alignment of payment terms for both groups. The intent is to give both student populations the same online registration and payment experience.
 - UWEO is also investing in the modernization of our web presence. The goals of the new web redesign are:

- Align the UWEO web presence and UW PCE brand to closely fit within the broader UW “Be Boundless” branding.
- Implement modern, responsive web design standards that support content delivered across all PC, Apple and mobile computing devices.
- Keep the student at the center of the web experience by delivering content meaningful to the individual and offering the learner tools to customize their web experience such as favorites, wish lists, learning resources and access to peer learning communities.
- UWEO seeks to improve communications and working relationships across the campus community
 - UWEO marketing and communications staff are working closely with UW Marketing, Hornall Anderson Brand Experience Design and our campus partners to understand their perceptions of UWEO and to then close the gaps where misperceptions exist.
 - UWEO programmatic staff and operations staff are actively meeting with school and college leaders to better understand their future academic partnering needs. We are adjusting working agreements, budgeting processes and other partnering arrangements to better serve our colleagues.

2. In 200 words or fewer, please identify plans to adapt functions and services to support changing institutional needs in FY17.

UWEO is in the process of a number of internal process changes to improve current service to campus partners and to prepare for a future of expanding access to high-quality UW programs (credit and non-credit).

As mentioned, exploration is already underway to fully align the administrative experiences of fee-based students (especially graduate students) with state-based students. While there are differences in pricing and other legislatively imposed requirements, payment timing and registration systems can and should be aligned. Planning for this work will begin in earnest in 2016-17 with completion likely in 2017-18. This work will improve the student experience and also lower transactional work.

A second priority is to create a focused recruitment capability. While this will initially focus on the non-credit certificate portfolio offered by UWEO, the longer-term goal is to develop a high-touch and comprehensive capability that can be applied to other programs. This effort will take at least three years but will launch as a pilot in 2017.

UWEO manages more than 8000 contracts. Many of these are still transmitted across campus via paper and routed through numerous stakeholders. A team has agreed to pilot a digital document system to improve UWEO and campus partner efficiency.

3. Please identify any significant obstacle(s) or challenge(s) that your unit faces other than resource constraints. **Please plan to discuss these with the Provost.** If applicable, please summarize any operational risks that, from your perspective, the UW must work to mitigate over time.

1. A growing number of for-profit competitors are emerging in the non-credit space. While some of these companies are partnering with universities, many are intent on “disrupting” incumbent credit models. Most recently, companies offering “boot camps” or intensive workshops have emerged and are gaining visibility with the Department of Education for touting excellent job placement rates. These companies tend to operate in technology and business sectors, which are some of our highest enrolled courses. The new call from the Department of Education to allow these for-profit entities to offer financial aid (but not existing campus-based units like UWEO) adds to this threat. Overall, we are looking at more flexible formats but can counter this by building on our brand strength and continuously improving our programs through better data.

2. Like most units, our cost structures are increasing in an era of political pressure to contain higher education costs. We can mitigate those risks by increased efficiencies but, in some cases, we will need the support of campus partners to help us determine which services may be trimmed without impact program enrollments or quality.

3. The Seattle area is becoming more expensive for all of our employees. In certain key technical areas, like IT or Instructional Design, those with transferable skills are finding opportunities that can more than double their salaries. In some cases, like instructional design, there is not a formal HR category and the positions are often far lower than market rates when included in other job titles. We will need to look carefully at what we can afford and how we provide these essential services in the future.

4. As the work of UWEO becomes more integrated into critical campus infrastructure, service demands are not easily divisible by fee-based and tuition-based programs. For example, the demand for online and production services is growing but the fee-based model does not accommodate state-funded programs that might also need these same services. In some cases, colleges want to offer UWEO-supported courses to both fee- and state-based students. We anticipate more of these lines to blur in the future and the work to enhance ABB as well as more creative models for fee-based may be needed.

4. Though the Provost will soon be laying out requirements for FY17 merit increases, administrative units should begin to plan for a merit allocation equivalent to 90-95 percent of GOF/DOF merit pool. In other words, units should plan to receive less funding than may be necessary for a full merit increase, on average, for all GOF- and DOF-funded positions. **Please tell us how your unit plans to deploy funds for merit increases in FY17.**
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UWEO will align our merit increase allocations with that of the broader university. As a self-sustaining unit, all UWEO staff merit increases will be funded from our operational revenues and no central-funding assistance will be requested.

5. As you may recall, in the summer of 2014, the UW was the sole subject of a state-required audit of net operating fee (tuition) and local fund accounts. The audit reinforced the importance of monitoring expenditures against budgets on a biennial basis, ensuring that colleges, schools and administrative units have plans to spend fund balance in a reasonable and mission-driven manner and that these plans are acted upon.

As such, **we ask that you update the carryover usage plan you submitted as part of last year’s budget development process.** To do so, please **fill out the “Carryover Worksheet - Detail” tab** of the “FY17 Administrative Budget Worksheets & References” [Excel workbook](#) using:

- **The carryover plan you submitted last year, as a starting point, modified as needed.** If you need a copy of the plan you submitted last year, please email [Amy Floit](#) or [Becka Johnson Poppe](#).
- **New reserve figures**, as provided in the “Reserve Figures” tab of the aforementioned spreadsheet.
- **New carryover totals**, as provided in the “Carryover into FY16” tab of the aforementioned spreadsheet.

In the space below, please describe and explain any major change(s) to your carryover usage plan.

Given UWEO’s nominal DOF, and the utilization of these limited funds to subsidize our campus partner programs and to offset a small percentage of our employee benefits expense, we expect \$97.00 DOF carryover into FY16 and we anticipate spending that on miscellaneous administrative expenses.

6. The Provost will be making the decision to deploy *permanent* Provost Reinvestment Funds **primarily, if not exclusively, to cover for compensation increases. The only possible exceptions for permanent funds will be for critical compliance issues.** However, requests for temporary funds will only be entertained in areas of high institutional priority and in consultation with faculty, staff and students.

If you have a Provost Reinvestment Fund request that fits within these strict parameters, please describe it using the framework below.

UWEO is requesting no additional Provost Reinvestment funding.

Administrative Unit Carryover Usage Plan DETAIL

Please use this template to update the carryover usage plan you submitted last year. If you need a copy of your plan from last year, please email Amy Floit (afloit@uw.edu) or Becka Johnson Poppe (jbecka@uw.edu). New reserve figures are provided in the "Reserve Figures" tab; new carryover totals are provided in the "Carryover into FY16" tab.

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|---|--------------------------------|
| Administrative Unit Name: | UW Educational Outreach |
| Carryover Balance going into FY16: | \$ 97 |

| Usage Categories and Descriptions | Committed Year(s) | # of Years | Annual \$ Amount | Totals |
|-----------------------------------|-------------------|------------|------------------|-------------------|
| Unit's Reserve (10%) | | | | |
| | FY17 | 1 | \$ 222,536 | \$ 222,536 |
| Total Unit's Reserve: | | | | \$ 222,536 |

| Central Commitments | e.g. FY17, FY18 | e.g. 2 | | |
|-----------------------------------|-----------------|--------|------|-------------|
| 1. (description) | | | \$ - | \$ - |
| 2. (description) | | | \$ - | \$ - |
| 3. (description) | | | \$ - | \$ - |
| 4. (description) | | | \$ - | \$ - |
| 5. (description) | | | \$ - | \$ - |
| <i>Add more lines as needed</i> | | | \$ - | \$ - |
| Total Central Commitments: | | | | \$ - |

| "Spending Plan" Permanent Costs & Other Projects | e.g. FY17, FY18 | e.g. 2 | | |
|--|-----------------|--------|------|-------------|
| A. Permanent expenditures funded with temporary funds | | | | |
| 1. (description) | | | \$ - | \$ - |
| 2. (description) | | | \$ - | \$ - |
| B. Possible multi-year commitments | | | | |
| 1. (description) | | | \$ - | \$ - |
| 2. (description) | | | \$ - | \$ - |
| C. Immediate, current year use | | | | |
| 1. (description) | | | \$ - | \$ - |
| 2. (description) | | | \$ - | \$ - |
| <i>Add more lines as needed</i> | | | | |
| Total Permanent Costs & Other Projects: | | | | \$ - |

| | |
|-----------------------------------|-------------------|
| TOTAL CARRYOVER USAGE PLAN | \$ 222,536 |
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