

**Academic Unit/Campus Name: School of Nursing/UW Seattle**

Please complete this Word document and the accompanying Excel workbook (both of which were provided to your unit via email), and submit them to the Office of Planning & Budgeting (OPB) on or before **Thursday, February 1, 2018**.

Please email your materials to [Jason Campbell](#).

Please note that the responses you provide in this Word document **will** be posted to the OPB website.

**1. What is the academic vitality of your school, college or campus?**

Please provide both quantitative and qualitative information, leveraging published materials and [previous submissions](#) where possible. In your response to this question, you may wish to include responses to some or all of the following prompts. Please note that these are suggestions, not requirements.

- What are the top 3-5 **strategic goals** of your unit? Could any of these goals increase expenditures or decrease revenue for other units?

The School of Nursing's 3 primary goals over the next 5 years are to:

-- Solidify and strengthen our research output and impact, to recapture our #1 NIH funded status. (We are currently in the Top 5. Several grant related sub-goals come under this major goal, such as increasing grant proposals by 10% annually.)

--Continued delivery of highly respected Nursing programs, including our Doctor of Nursing Practice.

--Evaluate the current organizational structure of the School to determine how best to facilitate and support research and mentor junior faculty while maintaining high quality academic programs and clinical training.

(Sub-goals under this include revision of the curriculum where needed to expand clinical simulation training, now that our new Simulation Center is running, thereby reducing our dependence on clinical sites, which is a strong limiting factor.)

- What are your unit's **faculty** hiring trends from the last 2-3 years and faculty hiring expectations for the next 2-3 years? (you may provide information by department, if relevant)

We are seeing 5-6 retirements of senior faculty annually at this point, paying very large amounts of VEBA, and trying to continue to attract top researchers. We also have a competing requirement from the Washington Administrative Code (WAC) to hire lecturers with extensive clinical experience to teach certain courses. This has created a lot of discussion about what the appropriate mix of research faculty vs. lecturers should be, and how to attract and retain each group at the most efficacious level. This is an ongoing conversation.

- What are your unit's **student**-related initiatives, trends, or goals? (E.g. Curriculum innovation, student engagement in the Husky Experience, trends in your student credit hour production)

Our students are highly involved in community service initiatives and advocacy, which we strive to support with sponsored participation in service projects and activities like Nurse Legislative Day. We are also working to advance our clinical simulation training (now that our updated Sim Center is open), and to provide richer external clinical experiences. We would also like to be more strategic with our scholarship funding and are investigating ways to fully fund our PhD students (over time).

- What has your college done in relation to key **university initiatives**? (E.g. [Population Health](#), [Race and Equity Initiative](#), [Husky Experience](#), [Transforming Administration Program](#))

The School of Nursing prioritized funding for an Associate Dean of Diversity, Equity and Inclusion in Fall of 2017,

with an associated Diversity Council and ongoing initiatives related to expanding faculty, staff and student awareness and facility with these incredibly important topics. We have also created several efficiency-related administrative processes to ensure that we have funding for shifting priorities. These include a position control process where vacant positions are reviewed (and not refilled if appropriate, or refilled elsewhere, depending on organizational needs), centralized curriculum coordination and payroll, sufficient research support tools for current needs, etc. We have cut 9 (total FTE) staff positions in 3 years, and a portion of these savings allowed us to hire the Associate Dean of DEI (for example).

Please respond in 500 words or fewer and please use bullets, rather than dense prose.

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## 2. What is the fiscal vitality of your school, college or campus?

To answer this question, please complete the following tabs in the Annual Review Excel workbook:

- On the **purple tabs, i.e. the “Fiscal Reports,”** please:<sup>1</sup>
  - Review the prepopulated FY16 and FY17 fields on each fund source tab. The “Fiscal Vitality References and Tools” workbook (described below) provides information to help with this review.
  - Provide full revenue and expenditure plans for FY18, FY19, FY20, and FY21.
  - If there is an area of your unit that you wish to isolate in more detail (i.e. significant departmental self-sustaining, clinical, etc.), feel free to submit an additional fiscal (i.e. dark purple) tab.
  - Enter totals from each of the tabs into the Summary tab.
- On the **“Alternative Assumptions”** tab, please clearly identify and briefly explain any assumptions used in your calculations that are *different* from the Central Budget Assumptions on OPB’s [FY19 Annual Review Materials webpage](#). You are encouraged to refine and adjust the central assumptions, which are (in many cases) general and imperfect.
- On the **“Fiscal Vitality Qualitative Assessment”** tab of the Fiscal Vitality Report Excel workbook, please describe your unit’s overall financial health. If your unit’s fiscal data shows any negative (i.e. financially unhealthy) trends, please propose actions that your unit will take to improve its financial position.

The following resources are available to help you complete this work:

- **“Fiscal Vitality References & Tools” Workbook** (available on the [FY19 Annual Review Materials webpage](#)):
  - FVRowByRowDefinitions Tab: row-by-row general and unit specific parameters used to compile data in the Fiscal Vitality Reports Summary and Fund Source tabs.
  - BgtTypeClassInfo Tab: list of budget types, classes, super classes, family, and community that are referenced in the FVRowByRowDefinitions tab.
  - FVExpendituresPivot and FVBudgetRevenue&CarryoverPivot Tabs: budget number detail supporting the Summary and Fund Source data in the purple tabs of the Annual Review Excel workbook.
- **FY18 GOF/DOF Budget Base:** By November 22, OPB will provide FY18 permanent and temporary budgeted values, as of October 2017 fiscal month end. You can build off these for your FY18 plan, but you will need to adjust for any budget revisions that have occurred (or will occur) since October 2017 fiscal month end.
- **BI Portal Reports** (click on the B.I.Portal link under “Products”): Each report has Overview, Technical Information, and Interpretation tabs that describe the report, what is included in the data, the data sources, and how to use the report. Note, data may differ between reports, but they can still be used as resources.
  - Biennium To Date Budget Balances
  - Remaining Balance by OrgCode and Category
  - Forecasting Template by Fiscal Year and OrgCode (please note, this tool will imperfectly forecast expenditures if units employ fund shifts or cost transfers)
- **Central Budget Assumptions** (mentioned above), which includes additional resources and guidelines.
- **Q&A Sessions on November 28 and 30.** See the [FY19 Annual Review Materials webpage](#) for details.

In completing this work, please consider the tuition rates that you are recommending as part of Question 3.

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<sup>1</sup> Please note that grants, contracts, and gifts are included in the report to provide the Provost with a more holistic view of a unit’s financial activities. The amounts can be reconciled to FAS for biennium 2015-17. However, the grants & contracts amounts will differ from the Annual Report, prepared by the Office of Research. Also, grants, contracts and gifts amounts might differ from the BI Portal “Remaining Balance by OrgCode and Category Report.” In both cases, and possibly with other BI Portal reports, this is due to differences in data elements, context, and reporting period parameters. While the information is not perfect, it is included to facilitate discussions about the unit’s overall financial health.

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**3. What are your school, college, or campus's tuition recommendations for 2018-19 (FY19)?**

Using the "Tuition Recommendations" tab of the Excel workbook, please provide tuition rate recommendations for 2018-19 (FY19). For each recommended tuition *increase*, please provide the information outlined below in 500 words or fewer (total). Here are a few notes and reminders:

- In last year's budget process, units submitted *preliminary* FY19 tuition recommendations, along with their FY18 tuition recommendations. You can review last year's submissions at [this webpage](#), along with a summary of FY19 (and FY18) [tuition recommendations](#). You may reuse responses, if they are still relevant.
  - Rate recommendations for *fee-based* programs are handled through a separate process than tuition-based programs. Please see the [Provost's letter](#) to deans and chancellors for more information about that process.
  - The legislature sets resident undergraduate (RUG) tuition rates. OPB anticipates a 2.0 percent RUG tuition increase in FY19.
  - If your recommendation involves creating a **new tuition category**, please be sure to identify the original tuition category, the proposed category and suggested tuition rate for FY19. If you plan to move only a subset of your programs into a new category, please identify those programs by major name, pathway, level and type. Please contact Jed Bradley ([jedbrad@uw.edu](mailto:jedbrad@uw.edu)) for instructions on how to modify the "Tuition Recommendations" tab.
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- Please provide information to justify the increase. This can include information about enrollment plans, peer comparisons, and/or market analyses. Please include information about how the incremental revenue generated will be spent by the school/college/department.

**Nursing DNP—3% increase (Resident)**

Incremental revenue from the fee increase will be used in all three programs to pay for projected 2% merit increase, to pay Summer Q instructors for 3 months instruction rather than 2 months in previous years, and to pay for UWCC2's increase in infrastructure charges. Also, AGNP incremental revenue will be used to upgrade equipment used in clinical courses. Finally, while headcount enrollment will not change, the fee increase will be used to offset 2019 revenue from reduced SCH in the FNP and NM programs. This rate increase would be offset with a similar one for our PCE DNP programs and is consistent with the market for this degree.

**Tier 3 --2% increase (Resident)**

Incremental revenue, with a portion of projected net revenue, will be used to pay Summer Q instructors for 3 months instruction rather than 2 months in previous years. Also, to pay for projected 2% merit increase. Increase will only offset our increased costs.

- Please describe whether you expect any substantial enrollment changes (including a change in the resident/nonresident composition) or any changes in the waivers likely to be awarded to your unit's students.

[We do not expect substantial enrollment changes from these tuition recommendations.](#)

- Discuss the impact on student debt load.

[While any increase in tuition has the potential to increase student debt load at some level, this increase is not substantive and when we communicated the rate changes to the Student Leadership Board, they were not upset by our recommendations, other than to note that programs which offer courses in Summer, such as our Accelerated BSN program, can be difficult to find financial aid for. We are currently revising the ABSN program to reduce the course load from two summers to one. \(The program is being condensed from 5 quarters to 4.\)](#)

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- Confirm (yes/no) that tuition recommendations were discussed with students.<sup>2</sup> Please discuss your recommendations with students, even if they are the same as the FY19 proposals you submitted last year.

Yes, we discussed with the Student Leadership Board on 1/29/18.

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<sup>2</sup> If the meeting schedules of faculty and student leadership groups present a challenge, please make accommodations to get approval within the necessary timeframe. If necessary, you may submit an update to OPB at a later date, after faculty and students have had an opportunity to review.

4. Please **update the carryover usage plan you submitted as part of last year's budget development process**. To do so, please complete the **"Updated Carryover Usage Plan" tab** of the Excel workbook. Please note:

- Your worksheet is pre-populated with the carryover usage plan you submitted last year and new estimated

<sup>3</sup> As a reminder, carryover balances are calculated at the end of each biennium and can only be *estimated* mid-biennium.

- **Carryover totals.**
- Please provide updated numbers in the "Updated Plan" column.
- If you have new line items, please add rows, as needed.
- For any major updates, please provide a brief description in the "Explanation of Changes/Updates" column.

If you would like to describe any items from the worksheet in greater detail, please use the space below. **For additional guidance**, please see the example posted at the [FY19 Annual Review Materials webpage](#).

Please note:

- If your unit has a **deficit** instead of a carryover, please confirm that you have an updated deficit mitigation plan in place with OPB. If you do not, please contact [Lisa McDonald](#).
  - If you believe the carryover for your unit is negative due to timing and if you anticipate a positive balance soon, please discuss this below and feel free to provide an updated carryover spending plan.
  - Since the Office of the President and the Attorney General's Office do not retain carryover funds, as a matter of University policy, those two offices are not expected to complete this question.
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5. **Please confirm that faculty councils AND student leaders within your unit/campus have been consulted** and given the opportunity to provide input as part of this budget planning exercise.

To confirm this, please do **one** of the following:

- Briefly describe who was consulted and when, and provide points of contact for your faculty council and student leadership.
- OR**
- Include signed letters from your faculty council chair and student leadership (a scanned PDF is fine) when you submit the rest of your materials.
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The Dean, Chair of Faculty Council, and the Chief Operating Officer met with the Faculty on 1/22/18 to discuss the questions posed in the FY'19 budget packet, and the school's associated plans to be included in this budget submission. The current Chair of the School of Nursing Faculty Council is Teresa Ward, [teward@uw.edu](mailto:teward@uw.edu)

The COO met with the School's Student Leadership Board on 1/30/18 to discuss the same. The current Chair of the School of Nursing SLB is Nadine Martinez, [martnad@uw.edu](mailto:martnad@uw.edu)