

***UW Bothell/UW Tacoma, Seattle College/School Name: UW Tacoma***

1. Please provide a **1-2 page description with visualizations if possible of how you intend to grow or contract over the next five years**. Please provide these strategic plans at the college or departmental level, if you so choose. Where significant growth is anticipated, please provide specific fund source names and projections (in dollars). If these plans assume additional Provost Reinvestment Funds (supplement), please make that clear. If you wish to include a summary of growth plans, services or activities supported by sources other than GOF/DOF, please do so. If cross subsidy is required from other sources, please summarize the extent of that subsidy.
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*In Tacoma's prior year report a headcount growth of 7% a year to reach 7,000 by 2020 was the goal. The 7% increase over target was achieved for Fall 2014. The new goal for Autumn 2015 is 4,800 (6.5%). While the 7,000 by 2020 is still an achievable goal, it will be the decision of the new Chancellor if this is the path most appropriate for UWT. Substantial growth will be achieved by the addition of new programs. In 2015 the MS in Geospatial Technologies will accept students, and an MS in Environmental Science, BS in Math, BS in Biomedical Sciences and a BS in Electrical Engineering are currently under consideration. For the future Bachelor degrees in Cyber Operation and Industrial Engineering are being discussed. In addition to growth through new enrollments the Campus has begun a study of support services for students. The goal is to improve the retention and success of Tacoma Students.*

*This growth will require additional faculty, staff and facilities. These needs will be met through the growth in tuition dollars and also through existing fund balances (GOF: Tacoma General Reserves and DOF: Dean's Office-Tacoma). It is currently anticipated that at the close FY2015 these funds should hold approximately \$18.M, with \$6M being a temporary allocation which will be available in FY2016. At the close of FY16 the fund balances should total approximately \$9M with \$5M being a temporary allocation. On-going operating fund commitments will continue to be made based upon expected operating funding availability.*

*For the 2013 Biennium the Campus received Proviso Funding for Stem in the amount of \$684,000. These funds were to provide Instruction in the Institute of Technology. It is understood that this is a biennial funding approval, but it is critical to the program and if the funding is not continued it will be necessary to continue this funding from other sources.*

- 2. Please identify significant administrative, academic or other obstacle(s)** present in achieving the growth or strategic plans identified as part of Question 1. **Please plan to discuss these with the Provost.** If applicable, please summarize any operational risks that the UW must work to mitigate over time from your perspective.
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The administrative staffing needs can be met through tuition funding, the obstacle that may be at issue is the physical (facility) growth needed to house the student, faculty and administrative growth. The Tacoma Campus has four heritage buildings which can be renovated to provide additional space. These buildings are McDonald Smith, Tioga, Tacoma Paper and Stationary and the Swiss/Wilde building. The Campus has previously renovated and is using the first floor of McDonald Smith and the remaining two floors will be renovated to 2014-15. This space will be classroom and office space. The Tioga Building, next to the Tioga Library Building will be renovated in 2015-16 and will be office space. The Tioga Paper and Stationary Project was awarded \$1.9M for pre-design and design, we will be seeking additional state funding, as well as other funding sources, for this project. The remaining project of the Swiss/Wilde Building is a project for future study. In addition, we have begun to explore options to increase student housing both within Court 17, our existing building, and with an additional building. We think both of these options can be achieved without using university capital funds.

3. Using the “Tuition Rec Worksheet” tab of the “Worksheets and Reference Materials –Academic” Excel workbook ([http://opb.washington.edu/sites/default/files/opb/Budget/Worksheets\\_and\\_Reference\\_Materials\\_Academic.xlsx](http://opb.washington.edu/sites/default/files/opb/Budget/Worksheets_and_Reference_Materials_Academic.xlsx)) please identify proposed changes to current tuition rates in FY16 (2015-16) and FY17 (2016-17).

If you are recommending the creation of a **new tuition category**, please describe those changes below and be sure to identify the original tuition category, the proposed category, a suggested tuition rate for FY16 and (if applicable) a percentage increase for FY17. 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.

Do you have any long-term plans for tuition that warrant discussion? If yes, please describe them below.

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*Currently the new programs being considered are Undergraduate and those that are Graduate fit within the current tier levels of Graduate tuition. A Master’s in Business Analytics is in review and it may have a separate fee structure but that is yet to be determined.*

*A final decision has not been made regarding the MBA Tuition, as this program is not currently “on tier”. This decision will be made by the close of the calendar year.*

*There is an on-going discussion by certain academic units regarding their desire to move off the existing tiers. No decision has been reached.*

4. Please describe your school or college’s emerging or changing faculty needs, including information about faculty hiring trends and the recruitment and appointment of lecturers.
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*The Campus is currently hiring faculty for growth. This growth is either new areas which require a specialized discipline not currently available on campus or expansion of existing disciplines. At 24 years of age the Campus has experienced some Faculty retirements but replacements are not the majority of hires. As the Campus moves forward it will be important to be mindful of the mix of tenure track vs. lecturer, and of the full time vs. part time lecturer mix.*

5. In the event that state funding for compensation adjustments in FY16 is not available, **all units** should have plans to cover GOF/DOF salary increases out of other fund sources. Should no tuition revenue be available, Provost Reinvestment Funds may be dispatched to provide support for increases. Please provide your units’ plans to cover expenses associated with salary increases. A salary and tuition revenue model is available on the OPB website at <http://opb.washington.edu/content/fy16-budget-development>; this model is designed to give you a sense of the magnitude of the support that will be required at various percentage increases.
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In FY15 the total cost of Merit Increases, including benefits, was \$1.3M. It is anticipated that these costs will be \$1.4M in FY16 and this amount is included in our planning for new tuition and existing reserves if the state does not cover any portion of the cost.

6. This summer, the UW has been the sole subject of a state-required audit of net operating fee (tuition) and local fund accounts. This audit has revealed 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 colleges and schools provide itemized obligations against fund balance, as estimated by OPB for the close of FY14. These obligations may be categorized by the following general classifications in the example provided, but greater detail is expected and will be relevant in discussions with the Provost.
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*See attached Spreadsheet*

7. **Though we believe that few, if any, state funds will be available and any new Provost Funds may be dispatched for mitigating cuts or providing salary increases, please indicate what Provost Reinvestment Funds are being requested.** Requests for funds should be identified by a unique title, accompanied by the amount requested, the year funding is requested, whether the request is for permanent or temporary funds, the number of years funding is needed in the case of a temporary request and a brief description, not to exceed 500 words. **Successful requests will provide better experiences for students and faculty, contribute to the long-term financial health of the University, and/or reduce institutional risk<sup>1</sup>.**

**Importantly, requests for new funding will be considered alongside carryover spending plans.** Schools or colleges with growing temporary fund balances will be asked to explain why new funding is needed to support program enhancements.

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<sup>1</sup> Please refer to the FY16 Budget Development web page at <http://opb.washington.edu/content/fy16-budget-development> for more information about the University's Sustainable Academic Business Plan goals and top institutional risks.

**UW Tacoma**  
**Risk/Opportunity Projections FY15**  
(In 000's)

		<u>GOF</u>	<u>DOF</u>	Notes (see below)
<b>Beginning Balance 7/1/14</b>		<b>8,022</b>	<b>32,343</b>	<b>4</b>
<b>Sources of Funds</b>				
Tuition Funding FY 15	P	3,462		
Tuition True-up FY 2014		859		
Provost's Reinvestment (3% of UG Tuition Inc)		706		
Estimated Summer Revenue (Net)			3,200	
<b>Total Sources</b>		<u><b>5,027</b></u>	<u><b>3,200</b></u>	
<b>Total Sources + Beg Balance</b>		<u><u><b>13,049</b></u></u>	<u><u><b>35,543</b></u></u>	
<b>Uses of Funds</b>				
Contingency Funding	T	1,000	3,000	1
State Reduction to Benefits	P	427		
Salary Increases (Merit)	P	1,300		
Faculty Promotions	P	62		
<b>New Hires</b>				
Faculty	P	2,134		
Staff	P	1,595		
Staff	T	243	115	
Lecturer Funding	P	1,552		
Lecturer Funding	T	1,458		
New Administrative Hires (VCAA)	P	225		
<b>New Initiatives</b>				
Writing Center Funding	P	109		
Student Success and Retention	P	100	50	
Technology Equipment Refresh	P	225		
Technology Equipment Refresh	T	125		
Miscellaneous Adjustments		26		
<b>Temporary Funding</b>				
Start-Up Funding	T	36	351	
Faculty Search Funding Research Center Funding	T	387	370	
Summer Revenue Distribution to Units			2,901	
<b>Capital Projects</b>				
Minor Capital Projects (UWT Projects)			2,190	
Jefferson Project (CPO)			80	
McDonald Smith Renovation (CPO)			307	
19th Street Crash Barrier (CPO)			19	
Pagni and Lenti Bldg (CPO)			15	
MDS Remodel (Projection) (CPO)			11,000	2
Tioga Renovation			8,000	3
Tacoma Paper & Stationery/Wild Project			5,000	3
<b>Total Uses</b>		<u><b>11,004</b></u>	<u><b>33,398</b></u>	
<b>Total Available for FY 15</b>		<u><u><b>2,045</b></u></u>	<u><u><b>2,145</b></u></u>	Additional contingency \$; See Note 1

**Notes:**

1. This \$4M contingency is lower than UWT's desired target. They would like to hold \$10-12M to cover opportunities for pollution clean-up, capital project risk, new chancellor's initiatives, etc.
2. The MDS remodel amount was changed from \$10M in the initial budget submission to \$11M
3. Item added; not included in initial budget submission
4. OPB's DOF carryover amount is \$39,343,000. The \$7M difference will be researched separately.