

Academic Unit/Campus Name: UW Tacoma

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?**

Increasing undergraduate retention. This could create some additional instructional costs to staff bottleneck courses but to a very great extent we have capacity to serve students with the existing faculty.

Campus-wide academic master plan. Faculty are limiting the introduction of new degree programs until completion of the plan, and the plan will pace introduction of new degrees campuswide to support resource planning for startup expenditures.

Developing a sustainable business plan. This will be guided by the academic plan. Our challenge is to fund access for underserved populations while maintaining excellence in education and scholarship.

- **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)**

Faculty hiring trends:

Permanent faculty positions are replacing temporary lecturers. Only 1-2 new faculty positions will be funded in FY 2019 to fulfill commitments to new degree programs such as electrical engineering.

- **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)**

Trends in student populations:

The proportion of undergraduate to graduate students remains steady at 85:15. Since 2015 enrollment of new students directly from high school has increased by 28% (462 vs 588), but in fall of 2017 60% of all undergraduates originated as transfer students.

Curriculum efforts:

Campus-wide review by faculty has resulted in the elimination of more than 500 inactive courses from the curriculum records. Two curricula have embraced a hybrid format that reduces travel to campus: MBA and MS in Business Analytics. 35 faculty participated in training on technology-infused pedagogy and e-learning, yielding more than 70 UW Tacoma faculty certified to teach online (. More than 20% of the faculty are now so certified.

Student Success Initiatives:

- Our Student Success Council is comprised of faculty and staff focused on (1) enhancing high impact practices, (2) communicating pathways through the college experience, and (3) improving and assessing the Husky Experience
 - We collaborate across multiple units to support and celebrate first-generation students, underrepresented minorities, veterans, and undocumented students.
 - We've launched the Emergency Aid Lab, created a Student Advocate position to link students to social and support services, and expanded The Pantry food bank for students.
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- **What has your college done in relation to key university initiatives? (E.g. [Population Health](#), [Race and Equity Initiative](#), [Husky Experience](#), [Transforming Administration Program](#))**

UW Initiatives:

Population Health: Faculty serve on the executive council and as Fellows. BSN students assessed individual and family needs related to homelessness and shared results with the Tacoma Pierce County Health Department, yielding the first summit on housing inequities in the county. Projects include community health assessment in isolated/low income communities and creating media for the Tacoma Fire Department to promote hypertension management.

Race & Equity: The search for a new Assistant Chancellor for Equity & Inclusion is complete. The Center for Equity & Inclusion hosted student-led dialogues, offered Safer Zone training for LGBTQ+ with a community partner organization, and expanded speakers, workshops, films, and celebrations of diversity. Faculty Assembly is supporting campus-wide learning on inclusive pedagogy, and executive leadership is working to infuse equity & inclusion throughout the campus.

TAP: Assessed the customer experience with UW Tacoma's Finance & Administration (F&A) Division. Surveyed 190 stakeholders and held four focus groups. We are finalizing four process improvements and implementing service level standards for key services.

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:¹
 - 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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¹ 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.

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) 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.**

The MBA program is a two year cohort program. For FY17 tuition was reduced by 8% for year one students. The change indicated on the Recommended Tuition Rates page maintains this decrease for the second year of the cohort.

The Masters in Business Analytics Program was new in FY17, after operationalizing the program it was determined that the program would better serve the students if it were moved from a three quarter program to a four quarter program. The fourth quarter is in the summer. The change indicated appears to be a significant drop but that keeps the program price the same for four quarters, Summer and an Academic Year, as it currently is for three quarters, Academic Year only.

Update 5/10/2018: The Nursing program is listed as a separate category from Tier II, however, the tuition rate is the same as Tier II. For 2018-19, we are recommending that the program officially be coded as Tier II, so that the rate change applied to that Tier is in effect for the program.

- **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 anticipate any substantial enrollment changes to the MBA program as this continues a prior change.

The MSBA program currently has a 40 student cohort but demand for the program is very high. It is possible that a second cohort would be added to bring total enrollment to 80 annually.

- **Discuss the impact on student debt load.**

Maintaining the MBA program's tuition reduction would likely decrease student debt load.

The MSBA program total cost remains the same so no impact on debt load is expected.

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

Changes to the MBA program tuition were discussed with students last year and this year.

Students in the MSBA have been informed that the program design and length is changing while total cost remains the same. Current students in the MSBA program are not affected by tuition changes because of the program's short duration.

Update 5/10/2018: Students are aware that the rate for the Nursing program matches Tier II, and we have informed them of the proposed increase to that rate for the upcoming academic year.

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.
- Your worksheet is pre-populated with the carryover usage plan you submitted last year and new estimated carryover totals.³
 - 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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² 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.

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

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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Campus Budget Committee (CBC) guides the budgeting process and advises the Executive Budget Committee (EBC) in its role executing campus finances and establishing sustainable budgets. (Pulled from the CBC Charge Letter). The CBC includes an undergraduate representative from ASUWT and a graduate student. The CBC also includes both the Chair and the Chair-elect of our Faculty Executive Council (EC) as members, and the Chair of EC also sits on the EBC.

- April Lai, ASUWT Finance Director
- TBA, Graduate Student

The Services and Activities Fee Committee (SAFC) is appointed by the chancellor. Student members of the SAFC set the amount of the SAF and recommend what services the fee will fund. The SAFC includes seven students, four non-voting ex officio members and a compliance officer.

- TJ (Timothy Estes), SAFC Chair