Strategic Planning and Budget Advisory Committee

Wednesday, April 20, 2022
8:15 am - 9:50 am

AGENDA

1. Call to Order

2. Approval of the minutes of March 16 and April 6, 2022.

3. Presentation and Discussion: Undergraduate student recruitment, retention & diversity
(Presenters: Kasey Urquidez, Vice President, Enrollment Management & Dean of Undergraduate Admissions)

4. Presentation and Discussion: Graduate student recruitment
(Presenter: Andrew Carnie, Vice Provost, Graduate Education and Dean of the Graduate College)

5. Presentation and Discussion: Update on AIB - Strategic Budget Allocation Guidelines
(Presenters: Garth Perry, Vice President/Chief Budget Officer; Colin Blakely, Associate Vice President, Strategic Initiatives, and Director, School of Art)

6. Senior Leadership Updates

7. Adjournment
Minutes
Wednesday, April 20, 2022
8:15-9:50am via Zoom


Absent: G. Heileman, A. Miller, I. Moore, J.P. Rocznia, L. Rulney, S. Troutman


Presenter(s): Kasey Urquidez, Vice President Enrollment Management & Dean of Undergraduate Admissions
Andrew Carnie, Vice Provost Graduate Education & Dean of Graduate College
Garth Perry, Vice President/Chief Budget Officer
Colin Blakely, Associate Vice President Strategic Initiatives & Director School of Art

Call to Order
Co-Chair Helm called the meeting to order at 8:17 a.m.

Approval of the Minutes of March 16, 2022 and April 6, 2022
The minutes of March 16, 2022 were approved with no abstentions or objections. The minutes of April 6, 2022 were approved with no abstentions or objections.

Presentation and Discussion: Undergraduate student recruitment, retention & diversity
(Presenter: Kasey Urquidez, Vice President, Enrollment Management & Dean of Undergraduate Admissions)
Helm thanked Urquidez for coming to SPBAC. Urquidez explained that the presentation would cover undergraduate recruitment, not retention. Urquidez spoke about the "birth
cliff” that all post-high school institutions are dealing with right now: after the 2008 recession there were lower birth rates which means less students expected to come out of high school. Although there are less students, more are graduating high school; the graduation rate is about 86%, yet the number of students going to college is not increasing. The pandemic will also have an impact long-term which is currently unknown. Looking at UArizona’s numbers, there have been over 48,000 applications for the fall; there has been an increase in non-resident as well as first generation students. The enrollment fees for next year have already been paid by some students; the numbers are up from last year. Currently UArizona is up by 10% from residents, 13% from domestic non-residents and 88% for international students. There is no enrollment fee for Arizona Online. There has been an increase in requests for on-campus housing, and UArizona will have to close housing off next week.

While there has been a slight decrease in white students enrolling for orientation, there has been an increase in Latinx students. There are programs like “Mi Casa Es Tu Casa” which works closely with financial aid so that students know what type of aid is available and what the true costs, out-of-pocket will be for college. This Saturday is the big “admitted student day” for future students. Students who apply but are denied will receive information on how to apply for Pima Community College and how that can funnel into UArizona eventually. For students that dropped, there will be communication to show students the different ways to come back to UArizona (AZOnline, UAGC, On-Campus). In looking at financial aid, Urquidez’s team has discontinued the Deans’ Exemplary awards and reduced achievement awards for non-residents, which will save UArizona over $2 million. The tuition increase will also bring in an additional $5-6 million on the non-resident side. A committee member asked about the breakdown of where transfer applications are coming from; Urquidez explained that she does not have the information right now but will get it to SPBAC.

**Presentation and Discussion: Graduate student recruitment**
*(Presenter: Andrew Carnie, Vice Provost, Graduate Education and Dean of the Graduate College)*

Carnie explained that his presentation will go over a snapshot of UArizona’s spring enrollment, then look at expectations for the fall and show initiatives to grow graduate enrolment. Over the past 5 years, UArizona has grown 10% in graduate student enrollment and the spring of ‘22 has the highest yet. Carnie presented a slide that showed growth by college, with the largest growth being in master’s degrees in the College of Law (20% over 5 years). There has been an increase in the number of online students and a decrease in the number of students enrolling in main campus programs. UArizona is the most diverse R1 public institution in the U.S., with 25% of the students being underrepresented minorities. For fall ‘22, there has been an 8% increase in applications. There has been an increase in international students since visas have become more accessible and a decrease of domestic students. Graduate admissions continue throughout the summer and up until the start of classes, so the number is expected to increase. The decision date for doctoral programs is April 15; Carnie does not have an accurate number yet.
There are multiple things that the graduate college is doing to increase masters level enrollment. There is a project (21st Century Master Project) through the Office of Strategic Initiatives for two years whose goal is to make graduate school more accessible and easier to apply for. In order to do that, they have to create master’s degrees that are interesting to those entering the work force; the degrees need to be appealing and marketable. The graduate college is in the process of building out technology that that leads to more streamlined processes. One that will be used for admissions and recruitment processes is called Grad App. The other app, called Grad Path, is used for course planning and degree tracking. They are working with UITS and TRELLIS on these. Carnie’s team has been working for eight months on policies to support professional master’s students. They hired four faculty fellows to lead task forces of staff, students and faculty and to host workshops. The task forces are looking at creating new pathways to graduate education by way of stackable certification programs. They are also looking at ways to bring students back in if they have timed out. They are currently prioritizing ways to improve Grad Path and Grad App.

A committee member asked if Carnie has a breakdown of the admits by domestic via international and master’s vs doctorate; Carnie replied that the information will be put into the chat. A committee member asked about plans to help educate colleges on the benefits of growing their graduate student base as some believe that it costs money to have graduate students. Carnie replied that there are graduate students that do cost UArizona or grant holders money because it has been practice to fund certain students. He expressed that these new master’s degrees within the 21st Century Masters Project expect that the student or the students’ employer will pay. The committee member asked about the present master’s student population; Carnie replied that there are two-year professional master’s degrees and one-year research master’s degrees. He explained that the data is currently being worked on and the degrees will be sorted into the categories of terminal degrees, degrees that lead to a doctorate, and professional degrees. There will be a system set up in UAccess to identify by code where each degree fits. The member asked about master’s programs that are research intensive that may not lead to research job. Carnie explained that the team will come up with criteria that programs can use to sort their degrees and that it will be up to the individual colleges. A committee member asked about students who fit multiple modes; Provost Folks explained that it will be a program level choice. The team is looking into which programs are training grounds for PhD entry and which are not.

Presentation and Discussion: Update on AIB - Strategic Budget Allocation Guidelines
(Presenters: Garth Perry, Vice President/Chief Budget Officer; Colin Blakely, Associate Vice President, Strategic Initiatives, and Director, School of Art)
Helm explained that this is the last topic on AIB for the year and thanked Perry and Blakely for their time and expertise. Perry reminded the committee about how the stakeholder advisory group was formed at the recommendation of SPBAC and they have sent around multiple white papers on AIB throughout the process. Blakely shared his screen and explained that the presentation will go over recommendations that the stakeholder advisory group put together around strategic budget allocations (SBA). In
looking at AIB, the stakeholder advisory group’s intent was to: 1) keep the elements of RCM that work well (i.e. activity drivers in the form of SCH and F&A; the group added degrees earned to that list) and 2) have complete transparency (calculations used to determine allocations will be available for everyone to see). Blakely explained that challenges through the implementation of RCM have informed AIB in multiple ways: 1) the desire to insert more leadership and strategy into the process and to provide new tools; 2) simplify (increase transparency, more effectively communicate the budget); 3) bring all tuition into a single budget model (online + summer + distance + fall + spring).

Blakely presented a slide that showed a broad overview of how AIB is being structured and where SBAs fit. As the stakeholder advisory group looked into how these strategic budget allocation decisions may happen, they figured out it was about balance. Each college has unique structures and activities which need to be able to fit into the common strategic goals of the university. Through SBAs, the group is providing the space for these unique activities while also trying to create a sense of buy-in and accountability towards common strategic alignment to UArizona’s strategic plan. This cannot be done with a simple set of formulas, there needs to be a broader set of conversations to determine each college and support unit’s SBA for the year. The goal is to provide flexibility for strategic budget allocations to provide a structure that is focused and transparent; RCM’s subvention was based on historic data, so it was confusing and not transparent.

Blakely shared the stakeholder advisory group’s recommendation regarding SBAs. In year 1, SBAs should have a negative deviation of no more than 3-5% of the unit’s historic RCM budget. In years 2 and 3, SBAs should have a negative deviation of no more than 5-10% over the previous year. This proposal provides floors around which UArizona can mitigate some of the volatility that may happen as a result of the switch from RCM to AIB. The conversations around SBAs focused on what is not being met via the activity portion of AIB. These fell into two categories: the college and support units’ contribution to alignment with UArizona’s strategic goals and the recognition that each unit is unique, with different activities and different costs which needs to be recognized within the model. The stakeholder advisory group aligned those two categories with the concepts of ongoing budget (recurring annual allocation, base, permanent) and short-term budget (original, current year resources, temporary).

The group recommends that the SBAs should be divided into two categories: ongoing operations (can be aligned with ongoing budget) and strategic alignment. In each category there are key performance indicators to inform decisions around SBAs; the KPIs are currently a work in progress. Perry’s team is working with UAIR to figure out what is missing. The ongoing operations portion of SBA comes from two different sources: incremental growth/decline in SBA through revenue sharing and operations redistribution. Operations redistribution is a percentage of the unit’s total ongoing budget that gets redistributed through a larger pool for SBAs. The group feels this is important to create flexibility so that SBAs can stay as a dynamic allocation source. The strategic alignment portion of SBA comes from two sources as well: incremental growth/decline in SBA through revenue sharing and strategic redistribution. Strategic redistribution is a percentage of the total existing resources (including fund balances that have above a
10% reserve) that are considered as part of the larger resources available to the unit. Blakely asked for questions. Multiple committee members expressed concern at the fact that this is the first time they have heard of strategic reallocation and feels it is troubling to “cap at 10%”. The member also asked about providing stability for the allowing of course corrections. They want to know what happens if a college grows; will the SBA drop? They feel that it could be a hinderance to growth and are concerned about planning long-term. Provost Folks explained that the key balance is to figure out that piece. President Robbins expressed that this allows for long-term strategic planning because if a department enters into an agreement with the provost over a strategic goal, they know they have stability in that. Robbins expressed that this type of strategic planning has been lacking and feels that this is a good way to get things rolling. A committee member expressed concern at using this method with COM because their funds balances are tied in with Banner Academic funds; this causes confusion because the funds are already committed. The member expressed that there needs to be a mechanism to ensure this is done properly.

A committee member asked about what is considered a reserve in this regard since there are reserves that units cannot tap into. They also would like to know about KPIs and focusing on longer-term outlook on alumni satisfaction such as employment outcome. They brought up the Gallup poll that was done a few years ago and expressed that something similar could show the bigger picture of what people are getting out of UArizona (employment or education). Perry explained that the reserves are measured as the amount of fund balance as a percentage of operating costs. Perry expressed that colleges may have commitments against those balances which is unknown to his team, so they want to create a centrally managed commitment tracking module that would give visibility into the uses of those balances. Currently all that exists is the all-funds process and the narrative that all units are asked to complete to explain intended uses of existed balances. This is mentioned in the white paper but the distributions without explanation are very uneven. Blakely addressed the KPIs and explained that they are trying to figure out what the KPIs would be and what are things that can be measured.

Provost Folks brought up that there is a problem in which there is money in accounts that are not accessible to the deans, that is just sitting there. Folks explained that there should not be large piles of cash in the control of only one or two people that is unrestricted funding. This funding should be put to good use and needs to be found. A committee member expressed that some of those funds may be building up because a department does not know year to year what the funding landscape looks like. Brummund brought up that faculty in different department have different salaries, so the cost of degrees varies based on that as well as other factors. He expressed that addressing that somewhere in the model is important.
Senior Leadership Updates

Robert Robbins, President
- President Robbins expressed that AIB is very complex and appreciated all of the work done behind the scenes.
- Commencement is Friday, May 13, 2022.
- UAGC and Zovio Update: Zovio did do their earnings call.

Steve Briggs Moore, Senior Vice President and Chief Marketing and Communications Officer
- We are planning for commencement and filming new :06 and :15 second Wonder spots on campus next week for next fall and spring (the timing is based on needs for specific social media platforms).
- Our current campaign has 8.4 mm impressions to date and enrollment conversions (measured as entry into the enrollment funnel) are up 15% over same period last year.

Andrea Romero, Vice Provost for Faculty Affairs
- VP Romero is working on P&T; letters come out next Friday.

Liesl Folks, Provost
- Provost Folks shared that her office just pushed out $1.6 million to 13 funded proposals out of 92 asks. A full announcement will come out soon.
- Promotion and Tenure is wrapping up.
- UArizona is in the middle of the Career Track Pay Equity process which will wrap up by the end of the semester.
- UArizona is looking to hire a Vice President for Graduate Enrollment Management and Planning; the posting is up now.

Noah Vega, ASUA President
- Member Vega expressed thanks and farewell.

Adjourned
With nothing further, the meeting adjourned at 9:53 a.m.