

UM Western

System-level Summary & Metrics

Revenue

Expenditures

Staffing

Enrollment

Waivers

UM Western

Current Unrestricted Revenue & Metrics

REVENUE	FY14	FY15	FY16	FY17	FY18	Difference	
					Budgeted	1yr	4yr
State Support	\$7,419,367	\$7,790,384	\$7,822,866	\$7,911,539	\$7,772,720	-2%	5%
Resident Tuition	\$3,855,533	\$3,704,918	\$3,676,513	\$4,022,211	\$4,699,165	17%	22%
Non-res & WUE Tuition	\$2,338,387	\$2,392,081	\$2,343,774	\$2,391,095	\$2,700,795	13%	15%
Program Tuition & Fees	\$338,823	\$345,504	\$381,403	\$399,392	\$381,000	-5%	12%
Total Tuition Revenue	\$6,532,743	\$6,442,503	\$6,401,690	\$6,812,698	\$7,780,960	14%	19%
Total CU Revenue (gross)	\$13,952,110	\$14,232,887	\$14,224,556	\$14,724,237	\$15,553,680	6%	11%
Transfers/Other	\$74,663	\$42,751	\$257,099	\$59,083	\$46,300	-22%	-38%
Special Approps/OTO/MUS-RP	\$76,489	\$137,703	\$47,400	\$45,476	\$40,000	-12%	-48%
Total Revenue + Transfers/SA	\$14,103,262	\$14,413,341	\$14,529,055	\$14,828,796	\$15,639,980	5%	11%
Key Metrics							
State % Share	53.2%	54.7%	55.0%	53.7%	50.0%	-4%	-3%
State Support per Res FTE	\$6,870	\$7,534	\$7,625	\$7,108	\$7,333	3%	7%

- **Tuition Revenue – budgeted to increase for resident (+17%) and non-resident (13%)**
- **State % Share – drops to 50 % for FY18 peers = 59%**
- **State Support per Resident – increases by 3% to \$7,333 peers = \$7,851**

UM Western

Current Unrestricted Expenditures & Metrics

EXPENDITURES	FY14	FY15	FY16	FY17	FY18	Difference	
	Budgeted					1yr	4yr
Instruction	\$6,823,733	\$7,000,405	\$7,116,442	\$7,269,736	\$7,792,081	7%	14%
Academic Support	\$1,137,857	\$1,130,223	\$1,120,810	\$1,125,033	\$1,239,653	10%	9%
Student Services	\$1,925,108	\$2,024,974	\$2,075,980	\$2,371,886	\$2,412,364	2%	25%
Institutional Support	\$1,377,517	\$1,469,754	\$1,436,891	\$1,534,017	\$1,513,503	-1%	10%
Operation & Maintenance	\$1,661,507	\$1,792,876	\$1,587,857	\$1,721,752	\$1,652,136	-4%	-1%
Research	\$0	\$0	\$0	\$0	\$0	-	-
Public Service	\$0	\$0	\$0	\$0	\$0	-	-
Total CU Exp (net of waivers/SA)	\$12,925,722	\$13,418,232	\$13,337,980	\$14,022,424	\$14,609,737	4%	13%
<i>Waivers/Discounts</i>	\$874,432	\$965,175	\$930,726	\$958,875	\$1,030,243	7%	18%
<i>Special Approps/OTO</i>	\$0	\$0	\$0	\$0	\$0	-	-
Total CU Expenditures	\$13,800,154	\$14,383,407	\$14,268,706	\$14,981,299	\$15,639,980	4%	13%
Key Metrics							
% Instruction Exp	53%	52%	53%	52%	53%	1%	1%
% Instruct/Acad/Stud Ser	76%	76%	77%	77%	78%	2%	2%
Expenditures per Student	\$9,167	\$9,895	\$9,865	\$9,671	\$10,587	9%	15%

(based on Total CU Exp - net of waivers)

- **Instruction – up 14% over past 5 years, comprises 53% of total expenditures BOR target = 50%**
- **% Instruction + Aca Support + Stud Service is consistently over 76% BOR target = 70%**
- **Expenditures per Student – increases in FY18 by 9% to \$10,587 peers = \$12,858**

UM Western

Current Unrestricted Faculty/Staff FTE & Metrics

(does not include: graduate teaching/research assistants & part-time/other)

	FY14	FY15	FY16	FY17	FY18 Budgeted	Difference	
						1yr	4yr
STAFFING							
Contract Faculty (all)	79	77	79	77	80	4%	1%
Contract Administrators	7	7	6	6	6	0%	-14%
Contract Professionals	20	21	20	15	18	17%	-11%
Classified FTE	47	47	45	49	49	0%	5%
Total Faculty/Staff	153	152	151	147	153	4%	0%
EXPENDITURES							
Personal Services	\$10,493,908	\$10,836,967	\$10,901,423	\$10,996,772	\$12,112,464	10%	15%
Total Expenditures <small>(net waivers)</small>	\$12,925,722	\$13,418,232	\$13,337,980	\$14,022,424	\$14,609,737	4%	13%
Key Metrics							
Student to Faculty Ratio	17.9	17.5	17.0	18.8	17.3	-8%	-3%
%Personal Services of Total	81%	81%	82%	78%	83%	6%	2%

(based on Total CU Exp - net of waivers)

- **Student to Faculty Ratio – budgeted for 17.3 to 1, peers = 16.7**
- **Personal Services % Share – budgeted for 83%, HECA* benchmark = 75%**

*Higher Education Cost Adjustment, higher education specific inflation index developed by SHEEO

UM Western

Fiscal Year Student FTE - Average Annual Enrollment

	FY14	FY15	FY16	FY17	FY18	% Change (1-year)	
						17 vs 18	Fall 2017
ENROLLMENT					Budgeted	Projected	YTD*
Resident Undergrad	1,080	1,034	1,026	1,113	1,060	-4.8%	-1.0%
Resident Graduate	0	0	0	0	0	-	0.0%
Non-resident Undergrad	92	97	88	80	85	6.3%	7.3%
WUE	238	225	238	257	235	-8.6%	1.1%
Non-resident Graduate	0	0	0	0	0	-	0.0%
Student FTE Total	1,410	1,356	1,352	1,450	1,380	-4.8%	0.0%

*Fall 17 YTD as of 9/11

Reminder: preliminary census enrollment is recorded following the 15th day of class, final enrollment at end-of-term, fiscal year enrollment = ((summer + fall) + spring) / 2

- **1-year Budgeted FTE: -4.8% decrease, projected to drop 70 student FTE**
- **Fall 2017 YTD: 0% year to date increase for Fall 2017**
- **5-year Change: -2.1% drop in student FTE since FY14 (if projections prevail)**

UM Western

Waivers & Scholarships (source: CHE 114)

	FY14	FY15	FY16	FY17	FY18 Budgeted	Difference	
						1yr	4yr
WAIVERS							
BOR Designated	\$139,295	\$146,562	\$158,732	\$166,508	\$230,243	38%	65%
Resident Discretionary	\$350,335	\$382,008	\$342,668	\$355,812	\$387,000	9%	10%
Non-resident Discretionary	\$384,802	\$436,605	\$429,326	\$408,558	\$413,300	1%	7%
Scholarships	\$0	\$0	\$0	\$0	\$0	-	-
Total Waivers/Scholarships	\$874,432	\$965,175	\$930,726	\$930,878	\$1,030,543	11%	18%
Key Metrics							
Waivers per Student FTE	\$620	\$712	\$688	\$642	\$747	16%	20%

- **Waivers per student: budgeted to increase by \$105 per student, largely due to tuition increases**