

UM Western

FY20 Operating Budget Metrics

Revenue

Expenditures

Staffing

Waivers

Enrollment

UM Western

Current Unrestricted Revenue & Metrics

REVENUE	FY16	FY17	FY18	FY19	FY20	Difference	
					Budgeted	1yr	5yr
State Support	\$7,822,866	\$7,911,539	\$7,688,131	\$7,730,619	\$8,192,553	6%	5%
Net Tuition Revenue	\$5,527,424	\$5,912,121	\$6,680,783	\$6,603,167	\$6,516,695	-1%	18%
Transfers/Other/MUS_RP	\$304,499	\$104,559	\$138,964	\$183,082	\$134,898	-26%	-56%
Total Operating Revenue	\$13,654,789	\$13,928,219	\$14,507,878	\$14,516,868	\$14,844,146	2%	9%
Discounts/Waivers	\$874,266	\$900,578	\$946,792	\$902,961	\$1,002,243	11%	15%
Special Approps/OTO	\$0	\$0	\$0	\$0	\$0	-	-
Total Current Unrestricted	\$14,529,055	\$14,828,797	\$15,454,670	\$15,419,829	\$15,846,389	3%	9%
Student FTE	1,352	1,449	1,437	1,363	1,295	-5%	-4%
Resident Students	1,026	1,113	1,092	1,034	988	-5%	-4%
Non-resident Students	326	337	344	328	307	-6%	-6%
Key Metrics							
State % Share	57.3%	56.8%	53.0%	53.3%	55.2%	2%	-2%
State Support per Res FTE	\$7,625	\$7,111	\$7,038	\$7,473	\$8,296	11%	9%

(based on Total Operating Revenue, net of waivers, special approps)

- **State % Share – increase to 55%, peers = 57%**
- **State \$\$ per Resident – increase to \$8,300 per student, peer group median = \$8,217**

UM Western

Current Unrestricted Expenditures & Metrics

EXPENDITURES	FY16	FY17	FY18	FY19	FY20	Difference	
					Budgeted	1yr	5yr
Instruction	\$7,116,442	\$7,269,736	\$7,375,622	\$7,713,703	\$7,910,018	3%	11%
Academic Support	\$1,120,810	\$1,125,033	\$1,104,084	\$1,218,567	\$1,133,536	-7%	1%
Student Services	\$2,075,980	\$2,371,886	\$2,372,291	\$2,436,852	\$2,521,806	3%	21%
Institutional Support	\$1,436,891	\$1,534,017	\$1,548,968	\$1,574,934	\$1,611,508	2%	12%
Operation & Maintenance	\$1,587,857	\$1,721,752	\$1,790,031	\$1,617,207	\$1,639,278	1%	3%
Research	\$0	\$0	\$0	\$0	\$0	-	-
Public Service	\$0	\$0	\$0	\$0	\$0	-	-
Scholarships	\$56,460	\$30,300	\$15,473	\$23,239	\$28,000	20%	-50%
Total CU Exp (net of waivers/SA) →	\$13,394,440	\$14,052,724	\$14,206,469	\$14,584,502	\$14,844,146	2%	11%
Student FTE	1,352	1,449	1,437	1,363	1,295	-5%	-4%
Key Metrics							
% Instruction Exp	53%	52%	52%	53%	53%	0%	0%
% Instruct/Acad/Stud Ser	77%	77%	76%	78%	78%	0%	1%
Expenditures per Student	\$9,907	\$9,695	\$9,889	\$10,702	\$11,467	7%	16%

(based on Total CU Exp - net of waivers and special approps)

- **Instruction – up 11% over past 5 years, comprises 53% of total expenditures BOR target = 50%**
- **% Instruction + Aca Support + Stud Service is consistently over 78% BOR target = 70%**
- **Expenditures per Student – budgeted to increase by 7%, 84% of peer group median**

UM Western

Current Unrestricted Faculty/Staff FTE & Metrics

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

STAFFING	FY16	FY17	FY18	FY19	FY20	Difference		
						Budgeted	1yr	5yr
Contract Faculty (all)	79	77	79	84	83	-1%	5%	
Contract Administrators	6	6	5	5	5	0%	-18%	
Contract Professionals	20	15	16	19	19	2%	-5%	
Classified FTE	45	49	48	46	43	-7%	-5%	
Total Faculty/Staff	151	147	148	154	150	-2%	0%	
EXPENDITURES								
Personnel Services	10,901,423	10,996,772	11,360,710	11,597,624	12,112,362	4%	11%	
Total Expenditures <small>(net of waivers)</small>	13,337,980	14,022,424	14,190,996	14,584,502	14,844,206	2%	11%	
Student FTE	1,352	1,449	1,437	1,363	1,295	-5%	-4%	
Key Metrics								
Student to Faculty Ratio	17.0	18.8	18.2	16.3	15.6	-4%	-9%	
%Personnel Services of Total	82%	78%	80%	80%	82%	2%	0%	

- **Student to Faculty Ratio – budgeted for 16 to 1, peers = 16 to 1**
- **Personal Services % Share – budgeted for 82%, HECA* benchmark = 75%**

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

UM Western

Discounts, Waivers & Scholarships (source: CHE 104)

DISCOUNTS/WAIVERS/SCH	FY16	FY17	FY18	FY19	FY20	Difference	
					Budgeted	1yr	5yr
BOR Designated	\$158,732	\$166,508	\$172,877	\$136,795	\$144,014	5%	-9%
Resident Discretionary	\$342,668	\$355,812	\$417,225	\$416,128	\$481,912	16%	41%
Non-resident Discretionary	\$429,326	\$408,558	\$356,691	\$350,037	\$372,317	6%	-13%
Scholarships	\$0	\$0	\$15,473	\$23,239	\$32,000	38%	-
Total Discounts/Waivers/Sch	\$930,726	\$930,878	\$962,266	\$926,199	\$1,030,243	11%	11%
Student FTE	1,352	1,449	1,437	1,363	1,295	-5%	-4%
Key Metrics							
Waivers per Student FTE	\$688	\$642	\$670	\$680	\$796	17%	16%

➤ **Waivers per student: budgeted to increase by 17%**

UM Western

Fiscal Year Student FTE - Average Annual Enrollment

ENROLLMENT	FY16	FY17	FY18	FY19	FY20	% Change	
						19 vs 20	Fall 2019
					Budgeted	Projected	YTD*
Resident Undergrad	1,026	1,113	1,092	1,034	988	-4.5%	-5.0%
Resident Graduate	0	0	0	0	0	-	
Non-resident Undergrad	88	80	73	63	63	-0.6%	8.9%
WUE	238	257	271	265	245	-7.9%	-0.8%
Non-resident Graduate	0	0	0	0	0	-	
Student FTE Total	1,352	1,449	1,437	1,363	1,295	-5.0%	-3.0%

*Fall 19 YTD as 9/8

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: -5% decline**
- **Fall 2019 YTD: -3.0% year to date for Fall 2019**