

UM Western

FY21 Operating Budget Metrics

Revenue

Expenditures

Staffing

Waivers

Enrollment

UM Western

Current Unrestricted Revenue & Metrics

REVENUE	FY17	FY18	FY19	FY20	FY21	Difference	
					Budgeted	1yr	5yr
State Support (base)*	\$7,911,539	\$7,688,131	\$7,730,619	\$8,247,499	\$8,472,687	3%	7%
State Support (OTO)				\$36,263	\$0		
Net Tuition Revenue	\$5,912,121	\$6,680,783	\$6,603,167	\$6,444,774	\$5,583,250	-13%	-6%
Transfers/Other	\$104,559	\$138,964	\$183,082	\$94,723	\$104,164	10%	0%
Total Operating Revenue	\$13,928,219	\$14,507,878	\$14,516,868	\$14,823,259	\$14,160,101	-4%	2%
Student FTE	1,449	1,437	1,363	1,321	1,181	-11%	-19%
Resident Students	1,113	1,092	1,034	988	888	-10%	-20%
Non-resident Students	337	344	328	333	293	-12%	-13%
Key Metrics							
State % Share	56.8%	53.0%	53.3%	55.6%	59.8%	4%	3%
State Support per Res FTE	\$7,111	\$7,038	\$7,473	\$8,352	\$9,541	14%	34%

- **State % Share – increase to 60%, peers = 59%**
- **State \$\$ per Resident – peer group median = \$8,244**

UM Western

Current Unrestricted Expenditures & Metrics

EXPENDITURES	FY17	FY18	FY19	FY20	FY21	Difference	
					Budgeted	1yr	5yr
Instruction	\$7,269,736	\$7,375,622	\$7,713,703	\$7,885,334	\$7,459,650	-5%	3%
Academic Support	\$1,125,033	\$1,104,084	\$1,218,567	\$1,046,762	\$1,073,636	3%	-5%
Student Services	\$2,371,886	\$2,372,291	\$2,436,852	\$2,522,988	\$2,464,411	-2%	4%
Institutional Support	\$1,534,017	\$1,548,968	\$1,574,934	\$1,567,148	\$1,547,499	-1%	1%
Operation & Maintenance	\$1,721,752	\$1,790,031	\$1,617,207	\$1,724,784	\$1,586,904	-8%	-8%
Research	\$0	\$0	\$0	\$0	\$0	-	-
Public Service	\$0	\$0	\$0	\$0	\$0	-	-
Scholarships	\$30,300	\$15,473	\$123,239	\$37,207	\$28,000	-25%	-8%
Total CU Exp (net of waivers) →	\$14,052,724	\$14,206,469	\$14,684,502	\$14,784,223	\$14,160,100	-4%	1%
Student FTE	1,449	1,437	1,363	1,321	1,181	-11%	-19%
Key Metrics							
% Instruction Exp	52%	52%	53%	53%	53%	-1%	1%
% Instruct/Acad/Stud Ser Expenditures per Student	77%	76%	77%	77%	78%	0%	1%
	\$9,695	\$9,889	\$10,775	\$11,196	\$11,990	7%	24%

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

- **Instruction – 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%, 87% of peer group median**

UM Western

Current Unrestricted Faculty/Staff FTE & Metrics

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

STAFFING

	FY17	FY18	FY19	FY20	FY21	Difference	
					Budgeted	1yr	5yr
Contract Faculty (all)	77	79	84	80	80	0%	4%
Contract Administrators	6	5	5	5	4	-10%	-27%
Contract Professionals	15	16	19	20	22	13%	44%
Classified FTE	49	48	46	46	45	-1%	-8%
Total Faculty/Staff	147	148	154	150	152	1%	3%

EXPENDITURES

Personnel Services	10,996,772	11,360,710	11,597,624	11,751,608	11,556,684	-2%	5%
Total Expenditures <small>(net of waivers)</small>	14,022,424	14,206,469	14,684,502	14,784,223	14,160,100	-4%	1%

Student FTE

	1,449	1,437	1,363	1,321	1,181	-11%	-19%
--	-------	-------	-------	-------	-------	------	------

Key Metrics

Student to Faculty Ratio	18.8	18.2	16.3	16.5	14.7	-11%	-22%
%Personnel Services of Total	78%	80%	79%	79%	82%	2%	3%

- **Student to Faculty Ratio – budgeted for 15 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

DISCOUNTS/WAIVERS/SCH	FY17	FY18	FY19	FY20	FY21	Difference	
					Budgeted	1yr	5yr
BOR Designated	\$166,508	\$172,877	\$136,795	\$141,824	\$151,331	7%	-9%
Resident Discretionary	\$355,812	\$417,225	\$416,128	\$349,728	\$485,912	39%	37%
Non-resident Discretionary	\$408,558	\$356,691	\$350,037	\$422,279	\$365,000	-14%	-11%
Scholarships	\$0	\$15,473	\$23,239	\$37,207	\$28,000	-25%	-
Total Discounts/Waivers/Sch	\$930,878	\$962,266	\$926,199	\$951,038	\$1,030,243	8%	11%
Student FTE	1,449	1,437	1,363	1,321	1,181	-11%	-19%
Key Metrics							
Waivers per Student FTE	\$642	\$670	\$680	\$720	\$872	21%	36%

➤ **Waivers per student: budgeted to increase by \$150 per student**

UM Western

Fiscal Year Student FTE - Average Annual Enrollment

ENROLLMENT	FY17	FY18	FY19	FY20	FY21 Budgeted	% Change	
						20 vs 21 Projected	Fall 2020 Census*
Resident Undergrad	1,113	1,092	1,034	988	888	-10.1%	-9.5%
Resident Graduate	0	0	0	0	0		
Non-resident Undergrad	80	73	63	69	61	-11.6%	9.9%
WUE	257	271	265	264	232	-12.1%	-9.2%
Non-resident Graduate	0	0	0	0	0		
Student FTE Total	1,449	1,437	1,363	1,321	1,181	-10.6%	-8.4%

*Fall 20 as of 9/14 compared to Fall 19 census

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: -10.6% decline**
- **Fall 2020: -8.4% compared to Fall 2019 census**