

Helena College UM

FY23 Operating Budget Metrics

Revenue

Expenditures

Staffing

Waivers

Enrollment

Helena College UM

Current Unrestricted Revenue & Metrics

REVENUE	FY18	FY21	FY22	%Change		FY23	%Change
				1yr	5yr	Budgeted	1yr
State Support (base)*	\$5,313,095	\$5,531,548	\$5,343,953	-3%	1%	\$5,534,535	4%
State Support (OTO)		\$120,000	\$0	-100%	-	\$565,000	-
Net Tuition Revenue	\$2,253,179	\$1,760,589	\$1,785,185	1%	-21%	\$2,008,924	13%
Transfers/Other	\$125,501	\$82,943	\$136,231	64%	9%	\$208,048	53%
Total Operating Revenue	\$7,691,775	\$7,495,080	\$7,265,369	-3%	-6%	\$8,316,507	14%
<small>*includes campus base + earned portion of PF</small>							
Student FTE	836	657	659	0%	-21%	660	0%
Resident Students	807	638	634	-1%	-21%	636	0%
Non-resident Students	28	19	25	32%	-12%	24	-4%
Key Metrics							
State % Share	69%	74%	74%	0%	4%	67%	-7%
State Support per Res FTE	\$6,582	\$8,670	\$8,429	-3%	28%	\$8,702	3%

- **State % Share – budgeted for 67%, peer group median = 66%**
- **State \$\$ per Resident FTE = \$8,702, MUS FY22 average = \$10,678**

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Current Unrestricted Expenditures & Metrics

EXPENDITURES	FY18	FY21	FY22	%Change		FY23 Budgeted	%Change 1yr
				1yr	5yr		
Instruction	\$3,558,792	\$3,560,458	\$3,275,278	-8%	-8%	\$4,190,791	28%
Academic Support	\$1,269,233	\$1,167,277	\$1,279,688	10%	1%	\$1,194,404	-7%
Student Services	\$957,705	\$836,895	\$739,221	-12%	-23%	\$810,726	10%
Institutional Support	\$1,050,317	\$909,471	\$1,026,161	13%	-2%	\$1,188,420	16%
Operation & Maintenance	\$809,375	\$901,041	\$940,851	4%	16%	\$892,166	-5%
Research	\$0	\$0	\$0	-	-	\$0	-
Public Service	\$0	\$0	\$0	-	-	\$0	-
Scholarships	\$0	\$34,494	\$71,740	108%	100%	\$40,000	-44%
Total CU Exp (net of waivers) →	\$7,645,422	\$7,409,637	\$7,332,940	-1%	-4%	\$8,316,507	13%
Student FTE	836	657	659	0%	-21%	660	0%
Key Metrics							
% Instruction Exp	47%	48%	45%	-3%	-2%	50%	6%
% Instruct/Acad/Stud Ser Expenditures per Student	76%	75%	72%	-3%	-3%	75%	2%
	\$9,150	\$11,278	\$11,127	-1%	22%	\$12,601	13%

- **Instruction – comprises 50% of total expenditures BOR target = 50%**
- **% Instruction + Aca Support + Stud Service is 75% BOR target = 70%**
- **Expenditures per Student – 81% of peer group median**

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Current Unrestricted Faculty/Staff FTE & Metrics

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

STAFFING	FY18	FY21	FY22	%Change		FY23	%Change
				1yr	5yr	Budgeted	1yr
Contract Faculty (all)	39	33	33	-1%	-16%	30	-9%
Contract Administrators	4	1	1	-20%	-71%	2	79%
Contract Professionals	13	11	13	14%	-6%	12	-4%
Classified FTE	33	29	29	0%	-14%	32	11%
Total Faculty/Staff	89	74	75	1%	-16%	76	1%
EXPENDITURES							
Personnel Services	6,242,869	5,649,556	5,744,722	2%	-8%	6,258,168	9%
Total Expenditures <small>(net of waivers)</small>	7,645,422	7,409,637	7,332,940	-1%	-4%	8,316,507	13%
Student FTE	836	657	659	0%	-21%	660	0%
Key Metrics							
Student to Faculty Ratio	21.3	19.8	20.0	1%	-6%	22.0	10%
%Personnel Services of Total	82%	76%	78%	2%	-3%	75%	-3%

- **Student to Faculty Ratio – budgeted for 22 to 1, peers = 14 to 1**
- **Personal Services % Share – budgeted for 75%, HECA* benchmark = 75%**

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

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Discounts, Waivers & Scholarships

DISCOUNTS/WAIVERS/SCH	FY18	FY21	FY22	%Change		FY23 Budgeted	%Change 1yr
				1yr	5yr		
BOR Designated	\$71,885	\$19,545	\$29,144	49%	-59%	\$40,170	38%
Resident Discretionary	\$44,985	\$20,361	\$7,818	-62%	-83%	\$22,200	184%
Non-resident Discretionary	\$0	\$0	\$0	-	-	\$0	-
Scholarships	\$0	\$34,494	\$40,154	16%	100%	\$54,924	37%
Total Discounts/Waivers/Sch	\$116,870	\$74,400	\$77,116	4%	-34%	\$117,294	52%
Student FTE	836	657	659	0%	-21%	660	0%
Key Metrics							
Waivers per Student FTE	\$140	\$113	\$117	3%	-16%	\$178	52%
Net Tuition Per Student FTE	\$2,696	\$2,680	\$2,709	1%	0%	\$3,044	12%

- **Waivers per student: budgeted to remain consistent**
- **Net tuition per student remains consistent**

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Fiscal Year Student FTE - Average Annual Enrollment

ENROLLMENT	FY19	FY20	FY21	FY22	FY23 Budgeted	% Change	
						22 vs 23 Projected	Fall 2022 YTD
Resident Undergrad	777	721	638	634	636	0.3%	8.6%
Resident Graduate	0	0	0	0	0		
Non-resident Undergrad	13	12	10	15	15	0.0%	-28.8%
WUE	14	14	9	10	9	-10.0%	53.2%
Non-resident Graduate	0	0	0	0	0		
Student FTE Total	804	747	657	659	660	0.2%	8.6%

*Fall 22 YTD comparison with
Fall 21 as of 9/16

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: 0.2% increase**
- **Fall 2022: 8.6% increase compared to Fall 2021 census**