

Implementing AMP Goals with Program Planning and Budget

February 22, 2013

Agenda Items

1. Welcome
2. Resources and Opportunities
3. Strategies for Transfer Student Access & Success
4. AMP Update and Strategic Planning Overview
5. Incorporating AMP into This Year's Planning and Budget Process

Welcome

Resources and Opportunities

- Academic Quality & Innovation Grant Program
- Quality Matters Scholars Program
- Webinar Opportunities
- Innovation Conference – Oct 18-19, 2013

Strategies for Transfer Student Access & Success

- Will receive document next week from the EDI team with ideas for strategies for transfer student access and success
- Please review and discuss in department and bring feedback to college council meeting
- EDI team: Angela Bartoli, Liz Fisher, Mike Coolsen, Kurt Dunkel, Kim Presser, Mark Pilgrim, and Tracy Schoolcraft

AMP Update and Strategic Planning Overview

AMP Update

	2009-2010	2010-2011	2011-2012	2012-2013
Framing Narrative				Approval Pending
Vision Statement				Approval Pending
Mission Statement			Approved Spring 2012	
Goals & Objectives			Approved Spring 2012	
Strategies				Approval Pending
Suggested Activities				Approval Pending
Implementation Plan				Approval Pending

Status of AMP Approvals (FN, VS, S, SA, IP)

1 st approval steps, in no particular order	College of Arts and Sciences Council (pending) College of Business Council (approved 1/31/13) College of Education and Human Services Council (approved 12/3/12) School of Academic Programs and Services Council (approved 1/30/13) Graduate Council (approved with edits 1/25/13) General Education Council (approved 2/7/13) Teacher Education Council (approved 11/27/13) Honors Program (approved with edits 2/5/13) Office of Professional, Continuing, and Distance Education (approved 1/23/13) Institute for Public Service and Sponsored Programs (approved 1/31/13) Admissions and Enrollment Services (pending) Social Equity (approved 2/1/13) Institutional Research and Planning (approved 2/12/13)
2 nd approval steps, in no particular order	Academic Affairs Council SU-APSCUF Executive Committee
3 rd approval step	University Forum
4 th approval step	President's Cabinet

Spring 2013

- Finish revisions
- Final approvals for FN, VS, S, SA, IP
- Initiate implementation plan
 - Form and charge AMP Steering Committee
 - Integrate AMP goals, objectives, strategies into Academic Affairs planning and budget processes and requests

AMP As A Strategic Planning Tool

- Guide the activities of Academic Affairs
- Provide stability during
 - Challenging budget years
 - Times of leadership change
- Integrate with university planning, budget, assessment cycles
 - Annual and 3-5 year cycles
 - Accreditation cycles
 - Program review cycles
- Identify and set commonly-held priorities & goals
- Priorities and goals drive:
 - Initiation of new activities
 - Modification or discontinuation of current activities
 - Associated resource allocations

AMP-Driven Funding & Initiatives

- Over-awarding scholarships
 - G/O 2.1; Strategy B
- Advisors for Undeclared Students
 - G/O 2.2 & 2.3; Strategy F
- Extended hours in support service offices
 - G/O 2.2 & 2.3; Strategy F
- Academic Innovation Grants
 - G/O 1.1-1.8, 2.3, 3.1, 4.1-4.3; Strategies C, F, H, K, O, P
- Team to SREB Annual Institute on Teaching and Mentoring
 - G/O 4.1; Strategy C

Using AMP:

Departments, Offices, Committees

- Departments, offices, committees are NOT expected to do everything in AMP.
- AMP goals, objectives, strategies, activities are NOT all expected to occur or be achieved in year 1.
 - Phased-in approach over 1-5 years
 - Resource considerations
 - Some require additional exploration

Phased-In Approach

Priority	Strategies			
	Curriculum	Students & Learning	Faculty & Teaching	Support & Administration
<u>Critical Need</u> SU should begin to address in the 2012-2013 academic year (next academic year)	D, E, K, N, O, P	B, F, G	C	A, Q
<u>Essential Need</u> SU should begin to address in the 2013-2015 academic years (next 2-3 academic years)		H	M, L	R
<u>Important Need</u> SU should begin to address in the 2015-2017 academic years (next 4-5 academic years)				I, J

Using AMP: Departments, Offices, Committees

Which AMP goals, objectives, strategies, and suggested activities ...

- Make sense for you to address?
- Do your current goals and activities map to?
- Do your planned goals and activities map to?

Incorporating AMP into This Year's Planning and Budget Process

Objectives

- To work through the mechanics of submitting budgets that are connected to AMP goals
 - AMP goals connect to university goals
- Review new forms that will be used

Program Planning & Budget Guidelines

2013-15 to
be posted
soon



The screenshot shows the Shippensburg University website's President's Budget Message page. The top navigation bar includes links for About, Academics, Admissions, Athletics, Lighting the Way, My Info, Offices, and News. The main header features the Shippensburg University logo and the word "President" in large white text on a blue background. Below the header, a sidebar on the left lists several budget-related items, with "2012-2014 Program Planning & Budget Guidelines" highlighted in yellow. The main content area on the right is titled "President's Budget Message – September 2012" and includes a "Dear Ship Family:" greeting, a paragraph about the fall semester budget, a paragraph about past budget challenges and adjustments, a paragraph about the 2012-13 budget proposal, and a paragraph about the 2012-13 budget that was finally approved.

[Home](#) > [Office of the President](#)

President's Budget Message – September 2012

Dear Ship Family:

As fall semester begins, I'd like to share with you some current information about the 2012-13 academic year budget.

Over the past few years, Shippensburg University faced significant budget challenges. Despite modest tuition increases, our budget was constrained by cuts in state appropriations. To adjust, we made reductions after receiving input from you and other members of the campus community — input that helped us provide needed programs, services and support.

This year the initial state budget proposal cut 20 percent from funding for the Pennsylvania State System of Higher Education and its 14 member institutions. This followed an 18 percent cut for the 2011-12 academic year.

While the 2012-13 budget that was finally approved and signed into law for PASSHE, it still left a significant funding gap. We were able to bridge the gap with a \$188 annual tuition increase that PASSHE's Board of Governors approved. But, this is the fifth time in eight years that the increase in tuition has been necessary to maintain the quality of our education.

<http://www.ship.edu/President/Budget/>

2013-2015 Academic Affairs Focus

- Four AMP goals and objectives
 - 2.1 – student recruitment
 - 2.2 – student retention & persistence
 - 3.1 – experiential learning & high impact practices
 - 4.1 – faculty recruitment & retention
- Why these four?
 - Prioritization of strategies in AMP
 - Overall student success (2.2 & 3.1)
 - Hallmarks of a Ship education (3.1)
 - Middle states recommendations (2.2 & 4.1)
 - Impact on operating budget (2.1 & 2.2)
 - Performance funding factors (2.1, 2.2, 3.1, 4.1)

Direct Impact of Recruitment and Retention on University Budget

2012-13 BUDGET REDUCTIONS			
SHIPPENSBURG UNIVERSITY			
		<u>Division Responsible</u>	<u>Add'l Revenue/ Savings</u>
1	Decreased Undergrad Enrollment (-350HC)	AA	-\$2,249,800
2	Adjunct FTEF Not Used Due to Diminished Demand (~7.0 FTEF)	AA	\$376,117
3	Increased Enrollment (MBA)	AA	\$112,320
4	PCDE Increased Contribution to University E&G	AA	\$165,400
5	Reduction of Operating Budgets	AA	\$102,463
6	Savings from Position Vacancies/Replacements	AA	\$217,036
7	Savings from Filling Vacant Lines with One-year-only Temporary Faculty	AA	\$210,000
8	Use of Carryforward (Multi-year Savings, e.g., Performance Funding)	AA	<u>\$1,222,833</u>

\$156,369

- Tuition revenue, as of 2/20/13 PBC, has come in \$193,643 less than budgeted
- Need to increase enrollment till use of one-time money (in red + ~ \$200K = ~\$1.4 million) becomes \$0, assuming items 2-7 are ongoing adjustments
- Increased expenses due to pending contracts are estimated to be \$1 million

Budget context

- Using one-time money until enrollments grow to previous level
- One-time money is being used at a rate that is much greater than it grows
- One-time money sources
 - Performance funding (getting less per year now)
 - PCDE generated reserves
 - Adjunct/overload money not spent first year of cuts
- Will take several years to regain enrollment level
 - if enroll + retain 100 FTE UG each year, then will take ~ 4 years to reach previous enrollment
 - if 50, then ~ 8 years
- **Must use dollars strategically**
 - Investments – what activities will produce the greatest recruitment and retention – pay for themselves and contribute to the budget / enrollment gap; best those that also contribute to performance funding

Streamlining of Processes

Request	Last year	This year
Operational budget	Feb-April	Feb-April
Faculty staffing request**	Feb-April	Feb-April
“workstudy” students	Dept told in Fall	Feb-April
Additional “workstudy” students	Requested in Fall	Feb-April
Graduate assistantships	Processes Oct-March	Finished for 13-14
Discretionary GAs	Requested in Fall	Feb-April
Administrative Equipment request	Requested in Fall	Keep in Fall or make after ~ July 1
Educational Equipment request	Requested in Fall	Keep in Fall or make after ~ July 1

Other budget request processes to consider merging?

This year's process

1. Changing forms

1. Linkage to AMP goals (OR U goals if no AMP goal is appropriate)

2. Note assessment results

3. Combining Attachments A and C

2. Review of Attachment B and how relates to A&C

3. Recognize need feedback mechanism once budget have been release after ~ July 1

Last year's timeline

PLANNING SCHEDULE FOR DEVELOPMENT OF THE 2012-13 PROGRAM AND BUDGET PLANS

May - September	Reaffirmation of University mission and goals and adoption of strategic direction statements.
February 2012	<u>Program Planning and Budget Guidelines</u> issued by the Office of the President.
March 2012	Program managers review and modify <u>Program and Budget Plans</u> for fiscal years 2012-13 and 2013-14.
April 3	Revised <u>Program and Budget Plans</u> from academic departments to the college dean.
April 27	Revised <u>Program and Budget Plans</u> from administrative offices due to the appropriate vice president.
May 4	Deans' composite organizational unit plans to Vice President for Academic Affairs.

Review of examples

- Attachment A&C
- Attachment B

Exercise

- Review exercise in context of streamlining processes
- Time to work on exercise
- Review answer

Questions??

Break into groups

- College of Arts and Sciences
- College of Business
- College of Education and Human Services
- School of Academic Support
- Administrative Offices

Thank you for your
time and attention