

# Helena College UM

## System-level Summary & Metrics

**Revenue**

**Expenditures**

**Staffing**

**Enrollment**

**Waivers**

## Helena College UM

### Current Unrestricted Revenue & Metrics

REVENUE	FY14	FY15	FY16	FY17	FY18	Difference	
						1yr	4yr
					Budgeted		
<b>State Support</b>	\$5,079,109	\$5,245,273	\$5,462,105	\$5,558,149	\$5,379,083	-3%	6%
Resident Tuition	\$2,311,033	\$2,258,191	\$2,116,052	\$2,030,030	\$1,988,829	-2%	-14%
Non-res & WUE Tuition	\$212,177	\$155,642	\$138,828	\$149,728	\$146,729	-2%	-31%
Program Tuition & Fees	\$116,247	\$102,168	\$102,475	\$94,114	\$92,353	-2%	-21%
<b>Total Tuition Revenue</b>	\$2,639,457	\$2,516,001	\$2,357,355	\$2,273,872	\$2,227,911	-2%	-16%
<b>Total CU Revenue (gross)</b>	\$7,718,566	\$7,761,274	\$7,819,460	\$7,832,021	\$7,606,994	-3%	-1%
Transfers/Other	\$73,077	\$78,566	\$96,596	\$97,559	\$94,100	-4%	29%
Special Approps/OTO/MUS-RP	\$43,661	\$56,406	\$22,657	\$23,407	\$15,000	-36%	-66%
<b>Total Revenue + Transfers/SA</b>	\$7,835,304	\$7,896,246	\$7,938,713	\$7,952,987	\$7,716,094	-3%	-2%
<b>Key Metrics</b>							
State % Share	65.8%	67.6%	69.9%	71.0%	70.7%	0%	5%
State Support per Res FTE	\$5,426	\$5,739	\$6,541	\$6,689	\$6,674	0%	23%

- **Tuition Revenue – budgeted to decrease for resident (-2%) and non-resident (-2%)**
- **State % Share – remains consistent for FY18 at 71% peers = 74%**
- **State Support per Resident – increased by 23% since FY14, peers = \$6,516**

## Helena College UM

### Current Unrestricted Expenditures & Metrics

EXPENDITURES	FY14	FY15	FY16	FY17	FY18	Difference	
	Budgeted					1yr	4yr
Instruction	\$3,536,153	\$3,591,600	\$3,273,997	\$3,751,147	\$3,462,481	-8%	-2%
Academic Support	\$1,090,956	\$1,126,615	\$1,107,945	\$1,640,454	\$1,280,743	-22%	17%
Student Services	\$929,809	\$893,326	\$970,966	\$1,047,714	\$1,034,061	-1%	11%
Institutional Support	\$861,140	\$1,021,328	\$906,786	\$1,102,774	\$931,519	-16%	8%
Operation & Maintenance	\$755,654	\$888,822	\$882,588	\$950,699	\$917,290	-4%	21%
Research	\$0	\$0	\$0	\$0	\$0	-	-
Public Service	\$0	\$0	\$0	\$0	\$0	-	-
<b>Total CU Exp</b> (net of waivers/SA)	\$7,173,712	\$7,521,691	\$7,142,282	\$8,492,788	\$7,626,094	-10%	6%
<i>Waivers/Discounts</i>	\$236,414	\$100,823	\$78,250	\$99,239	\$90,000	-9%	-62%
<i>Special Approps/OTO</i>	\$0	\$0	\$0	\$0	\$0	-	-
<b>Total CU Expenditures</b>	\$7,410,126	\$7,622,514	\$7,220,532	\$8,592,027	\$7,716,094	-10%	4%
<b>Key Metrics</b>							
% Instruction Exp	49%	48%	46%	44%	45%	1%	-4%
% Instruct/Acad/Stud Ser	77%	75%	75%	76%	76%	0%	-2%
Expenditures per Student	\$7,396	\$8,010	\$8,344	\$9,921	\$9,199	-7%	24%

(based on Total CU Exp - net of waivers)

- **Instruction – down 8% from last year, comprises 45% of total expenditures BOR target = 50%**
- **% Instruction + Aca Support + Stud Service is consistently over 75% BOR target = 70%**
- **Expenditures per Student – budgeted to decrease 7% from last year peers = \$10,877**

## Helena College UM

### Current Unrestricted Faculty/Staff FTE & Metrics

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

	FY14	FY15	FY16	FY17	FY18	Difference		
						Budgeted	1yr	4yr
<b>STAFFING</b>								
Contract Faculty (all)	51	48	41	39	41	5%	-19%	
Contract Administrators	4	4	4	5	4	-17%	2%	
Contract Professionals	14	16	12	13	14	14%	2%	
Classified FTE	34	32	31	33	35	8%	4%	
<b>Total Faculty/Staff</b>	102	100	89	89	94	6%	-8%	
<b>EXPENDITURES</b>								
Personal Services	\$5,981,477	\$6,079,701	\$5,900,111	\$6,169,999	\$6,448,204	5%	8%	
Total Expenditures (net waivers)	\$7,173,712	\$7,521,691	\$7,142,282	\$8,492,788	\$7,626,094	-10%	6%	
<b>Key Metrics</b>								
Student to Faculty Ratio	19.2	19.7	20.7	22.1	20.4	-8%	6%	
%Personal Services of Total	83%	81%	83%	73%	85%	16%	1%	

(based on Total CU Exp - net of waivers)

- **Student to Faculty Ratio – budgeted for 20.4 to 1, peers = 16.8**
- **Personal Services % Share – budgeted for 85%, HECA\* benchmark = 75%**

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

## Helena College UM

Fiscal Year Student FTE - Average Annual Enrollment

	FY14	FY15	FY16	FY17	FY18	% Change (1-year)	
						17 vs 18	Fall 2017
<b>ENROLLMENT</b>					Budgeted	Projected	YTD*
Resident Undergrad	936	914	835	831	806	-3.0%	-6.3%
Resident Graduate	0	0	0	0	0	-	0.0%
Non-resident Undergrad	23	15	11	13	11	-15.4%	112.0%
WUE	11	10	10	12	12	0.0%	-23.0%
Non-resident Graduate	0	0	0	0	0	-	0.0%
<b>Student FTE Total</b>	<b>970</b>	<b>939</b>	<b>856</b>	<b>856</b>	<b>829</b>	<b>-3.2%</b>	<b>-5.2%</b>

\*Fall 17 YTD as of 9/11

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

- **1-year Budgeted FTE: -3.2% decline from last year**
- **Fall 2017 YTD: -5.2% year to date growth for Fall 2017**
- **5-year Change: -15% drop, down 141 student FTE since FY14**

## Helena College UM

Waivers & Scholarships (source: CHE 104)

	FY14	FY15	FY16	FY17	FY18 Budgeted	Difference	
						1yr	4yr
<b>WAIVERS</b>							
BOR Designated	\$64,282	\$72,088	\$55,682	\$64,325	\$58,320	-9%	-9%
Resident Discretionary	\$172,133	\$28,735	\$22,568	\$34,915	\$31,680	-9%	-82%
Non-resident Discretionary	\$0	\$0	\$0	\$0	\$0	-	-
Scholarships	\$0	\$0	\$0	\$0	\$0	-	-
<b>Total Waivers/Scholarships</b>	<b>\$236,415</b>	<b>\$100,823</b>	<b>\$78,250</b>	<b>\$99,240</b>	<b>\$90,000</b>	<b>-9%</b>	<b>-62%</b>
<b>Key Metrics</b>							
Waivers per Student FTE	\$244	\$107	\$91	\$116	\$109	-6%	-55%