

UM Western

FY19 Operating Budget Metrics

Revenue

Expenditures

Staffing

Waivers

Enrollment

UM Western

Current Unrestricted Revenue & Metrics

REVENUE	FY15	FY16	FY17	FY18	FY19	Difference	
					Budgeted	1yr	5yr
State Support	\$7,790,384	\$7,822,866	\$7,911,539	\$7,688,131	\$7,730,362	1%	-1%
Net Tuition Revenue	\$5,477,328	\$5,470,964	\$5,881,821	\$6,665,310	\$6,731,340	1%	23%
Transfers/Other	\$42,751	\$257,099	\$59,083	\$91,324	\$321,475	252%	652%
Total Operating Revenue	\$13,310,463	\$13,550,929	\$13,852,443	\$14,444,765	\$14,783,177	2%	11%
Scholarships/Discounts/Waivers	\$965,175	\$930,726	\$930,878	\$962,265	\$1,030,243	7%	7%
Special Approps/OTO/MUS-RP	\$137,703	\$47,400	\$45,476	\$47,640	\$40,000	-16%	-71%
Total Current Unrestricted	\$14,413,341	\$14,529,055	\$14,828,797	\$15,454,670	\$15,853,420	3%	10%
Student FTE	1,356	1,352	1,449	1,437	1,395	-3%	3%
Resident Students	1,034	1,026	1,113	1,092	1,075	-2%	4%
Non-resident Students	322	326	337	344	320	-7%	-1%
Key Metrics							
State % Share	58.5%	57.7%	57.1%	53.2%	52.3%	-1%	-6%
State Support per Res FTE	\$7,534	\$7,625	\$7,111	\$7,038	\$7,191	2%	-5%

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

- **State % Share – drops slightly to 52.3%, peers = 61%**
- **State Funds per Resident – slight increase in FY18, peer group median = \$8,393**

UM Western

Current Unrestricted Expenditures & Metrics

EXPENDITURES	FY15	FY16	FY17	FY18	FY19	Difference	
					Budgeted	1yr	5yr
Instruction	\$7,000,405	\$7,116,442	\$7,269,736	\$7,375,622	\$7,858,357	7%	12%
Academic Support	\$1,130,223	\$1,120,810	\$1,125,033	\$1,104,084	\$1,237,237	12%	9%
Student Services	\$2,024,974	\$2,075,980	\$2,371,886	\$2,372,291	\$2,473,440	4%	22%
Institutional Support	\$1,469,754	\$1,436,891	\$1,534,017	\$1,548,968	\$1,590,635	3%	8%
Operation & Maintenance	\$1,792,876	\$1,587,857	\$1,721,752	\$1,790,031	\$1,663,509	-7%	-7%
Research	\$0	\$0	\$0	\$0	\$0	-	-
Public Service	\$0	\$0	\$0	\$0	\$0	-	-
Total CU Exp (net of waivers/SA) →	\$13,418,232	\$13,337,980	\$14,022,424	\$14,190,996	\$14,823,178	4%	10%
Student FTE	1,356	1,352	1,449	1,437	1,395	-3%	3%
Key Metrics							
% Instruction Exp	52%	53%	52%	52%	53%	1%	1%
% Instruct/Acad/Stud Ser	76%	77%	77%	76%	78%	2%	2%
Expenditures per Student	\$9,895	\$9,865	\$9,674	\$9,878	\$10,626	8%	7%

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

- **Instruction – up 12% over past 5 years, comprises 53% of total expenditures BOR target = 50%**
- **% Instruction + Aca Support + Stud Service is consistently over 76% BOR target = 70%**
- **Expenditures per Student – budgeted to increase by 8%, 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	FY15	FY16	FY17	FY18	FY19	Difference	
					Budgeted	1yr	5yr
Contract Faculty (all)	77	79	77	79	82	3%	6%
Contract Administrators	7	6	6	5	6	19%	-15%
Contract Professionals	21	20	15	16	19	18%	-11%
Classified FTE	47	45	49	48	48	1%	4%
Total Faculty/Staff	152	151	147	148	155	5%	2%
EXPENDITURES							
Personnel Services	10,836,967	10,901,423	10,996,772	11,360,710	12,149,329	7%	12%
Total Expenditures (net of waivers)	13,418,232	13,337,980	14,022,424	14,190,996	14,823,178	4%	10%
Student FTE	1,356	1,352	1,449	1,437	1,395	-3%	3%
Key Metrics							
Student to Faculty Ratio	17.5	17.0	18.8	18.2	17.1	-6%	-3%
%Personnel Services of Total	81%	82%	78%	80%	82%	2%	2%

- **Student to Faculty Ratio – budgeted for 17 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

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Discounts, Waivers & Scholarships (source: CHE 104)

DISCOUNTS/WAIVERS/SCH	FY15	FY16	FY17	FY18	FY19	Difference	
						Budgeted	1yr
BOR Designated	\$146,562	\$158,732	\$166,508	\$172,877	\$179,243	4%	22%
Resident Discretionary	\$382,008	\$342,668	\$355,812	\$417,225	\$387,000	-7%	1%
Non-resident Discretionary	\$436,605	\$429,326	\$408,558	\$356,691	\$426,000	19%	-2%
Scholarships	\$0	\$0	\$0	\$15,473	\$38,000	146%	-
Total Discounts/Waivers/Sch	\$965,175	\$930,726	\$930,878	\$962,266	\$1,030,243	7%	7%
Student FTE	1,356	1,352	1,449	1,437	1,395	-3%	3%
Key Metrics							
Waivers per Student FTE	\$712	\$688	\$642	\$670	\$739	10%	4%

➤ **Waivers per student: budgeted to increase by 10%**

UM Western

Fiscal Year Student FTE - Average Annual Enrollment

ENROLLMENT	FY15	FY16	FY17	FY18	FY19 Budgeted	% Change	
						18 vs 19 Projected	Fall 2018 YTD*
Resident Undergrad	1,034	1,026	1,113	1,092	1,075	-1.6%	-7.0%
Resident Graduate	0	0	0	0	0	-	-
Non-resident Undergrad	97	88	80	73	75	2.4%	-26.2%
WUE	225	238	257	271	245	-9.6%	0.8%
Non-resident Graduate	0	0	0	0	0	-	-
Student FTE Total	1,356	1,352	1,449	1,437	1,395	-2.9%	-7.0%

*Fall 18 YTD as 9/9

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: 3% decline**
- **Fall 2018 YTD: -7.0% year to date drop for Fall 2018**