

Helena College UM

FY24 Operating Budget Metrics

Revenue

Expenditures

Staffing

Waivers

Enrollment

Helena College UM

Current Unrestricted Revenue & Metrics

REVENUE	FY18	FY22	FY23	%Change		FY24	%Change
				1yr	5yr	Budgeted	1yr
State Support (base)*	\$5,313,095	\$5,343,953	\$5,537,222	4%	4%	\$5,720,312	3%
State Support (OTO)		\$0	\$751,037	100%	-	\$150,000	-80%
Net Tuition Revenue	\$2,253,179	\$1,785,185	\$1,813,059	2%	-20%	\$1,839,306	1%
Transfers/Other	\$125,501	\$136,231	\$505,076	271%	302%	\$493,942	-2%
Total Operating Revenue	\$7,691,775	\$7,265,369	\$8,606,394	18%	12%	\$8,203,560	-5%
<small>*includes campus base + earned portion of PF</small>							
Student FTE	836	659	673	2%	-19%	687	2%
Resident Students	807	634	645	2%	-20%	660	2%
Non-resident Students	28	25	28	12%	-1%	27	-4%
Key Metrics							
State % Share	70%	75%	78%	3%	11%	76%	-1%
State Support per Res FTE	\$6,582	\$8,429	\$8,585	2%	30%	\$8,667	1%

- **State % Share – budgeted for 76%, peer group median = 63%**
- **State \$\$ per Resident FTE = \$8,667, MUS FY22 average = \$11,426**

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Current Unrestricted Expenditures & Metrics

EXPENDITURES	FY18	FY22	FY23	%Change		FY24 Budgeted	%Change 1yr
				1yr	5yr		
Instruction	\$3,560,458	\$3,275,278	\$4,140,034	26%	16%	\$3,805,499	-8%
Academic Support	\$1,167,277	\$1,279,688	\$1,143,686	-11%	-2%	\$1,188,636	4%
Student Services	\$836,895	\$739,221	\$793,155	7%	-5%	\$954,992	20%
Institutional Support	\$909,471	\$1,026,161	\$1,206,562	18%	33%	\$1,245,046	3%
Operation & Maintenance	\$901,041	\$940,851	\$950,405	1%	5%	\$969,387	2%
Research	\$0	\$0	\$0	-	-	\$0	-
Public Service	\$0	\$0	\$0	-	-	\$0	-
Scholarships	\$0	\$71,740	\$16,122	-78%	-	\$40,000	148%
Total CU Exp (net of waivers) →	\$7,375,142	\$7,332,940	\$8,249,965	13%	12%	\$8,203,560	-1%
Student FTE	836	659	673	2%	-19%	687	2%
Key Metrics							
% Instruction Exp	48%	45%	50%	6%	2%	46%	-4%
% Instruct/Acad/Stud Ser	75%	72%	74%	1%	-2%	73%	-1%
Expenditures per Student	\$8,826	\$11,127	\$12,258	10%	39%	\$11,941	-3%

- **Instruction – comprises 46% of total expenditures BOR target = 50%**
- **% Instruction + Aca Support + Stud Service is 73% BOR target = 70%**
- **Expenditures per Student – 73% 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	FY22	FY23	%Change		FY24	%Change
				1yr	5yr	Budgeted	1yr
Contract Faculty (all)	39	33	29	-12%	-26%	30	3%
Contract Administrators	4	1	1	-11%	-74%	1	0%
Contract Professionals	13	13	12	-4%	-10%	12	3%
Classified FTE	33	29	25	-12%	-24%	28	10%
Total Faculty/Staff	89	75	67	-11%	-25%	71	6%
EXPENDITURES							
Personnel Services	6,242,869	5,744,722	6,212,929	8%	0%	6,474,844	4%
Total Expenditures <small>(net of waivers)</small>	7,375,142	7,332,940	8,249,965	13%	12%	8,203,560	-1%
Student FTE	836	659	673	2%	-19%	687	2%
Key Metrics							
Student to Faculty Ratio	21.3	20.0	23.2	16%	9%	22.9	-1%
%Personnel Services of Total	85%	78%	75%	-3%	-9%	79%	4%

➤ **Student to Faculty Ratio – budgeted for 23 to 1, peers = 13 to 1**

➤ **Personal Services % Share – budgeted for 79%, 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	FY22	FY23	%Change		FY24	%Change
				1yr	5yr	Budgeted	1yr
BOR Designated	\$71,885	\$29,144	\$41,922	44%	-42%	\$39,000	-7%
Resident Discretionary	\$44,985	\$7,818	\$14,776	89%	-67%	\$15,750	7%
Non-resident Discretionary	\$0	\$0	\$0	-	-	\$0	-
Scholarships	\$0	\$40,154	\$47,779	19%	-	\$70,000	47%
Total Discounts/Waivers/Sch	\$116,870	\$77,116	\$104,476	35%	-11%	\$124,750	19%
Student FTE	836	659	673	2%	-19%	687	2%
Key Metrics							
Waivers per Student FTE	\$140	\$117	\$155	33%	11%	\$182	17%
Net Tuition Per Student FTE	\$2,696	\$2,709	\$2,694	-1%	0%	\$2,677	-1%

- **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	FY20	FY21	FY22	FY23	FY24 Budgeted	% Change	
						23 vs 24 Projected	Fall 2023 YTD
Resident Undergrad	721	638	634	645	660	2.3%	2.2%
Resident Graduate	0	0	0	0	0		
Non-resident Undergrad	12	10	15	13	12	-7.7%	0.0%
WUE	14	9	10	15	15	0.0%	28.0%
Non-resident Graduate	0	0	0	0	0		
Student FTE Total	747	657	659	673	687	2.1%	1.4%

*Fall 23 YTD comparison with
Fall 22 as of 9/17

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: 2.1% increase**
- **Fall 2023: 1.4% increase compared to Fall 2022 (YTD)**