Helena College UM

- FY27 Operating Budget Metrics
- Revenue
- Expenditures
- Staffing
- Waivers
- Enrollment

Helena College UM

Current Unrestricted Revenue & Metrics

	Actual			%Change		Budgeted	%Change
REVENUE	**FY21**	**FY25**	**FY26**	1yr	5yr	**FY27**	1yr
State Support (base)*	$5,531,548	$6,228,174	$7,220,037	16%	31%	$7,363,940	2%
State Support (OTO)	$120,000	$732,768	$426,489	-42%	255%	$350,109	-18%
Net Tuition Revenue	$1,760,589	$1,949,443	$2,167,787	11%	23%	$2,178,908	1%
Transfers/Other	$82,943	$388,675	$536,787	38%	547%	$680,337	27%
Total Operating Revenue	**$7,495,080**	**$9,299,059**	**$10,351,100**	11%	38%	**$10,573,294**	2%
Student FTE	657	713	731	3%	11%	738	1%
Resident Students	638	681	708	4%	11%	728	3%
Non-resident Students	19	32	23	-28%	21%	10	-57%
Key Metrics							
State % Share	76%	78%	78%	0%	2%	78%	0%
State Support per Res FTE	$8,670	$9,146	$10,198	12%	18%	$10,115	-1%

- **State % Share – budgeted for 78%, peer group median = 65%**
- **State $$ per Resident FTE = $10,459, MUS FY22 average = $13,298**

Campus-level EXPENDITURES

Helena College UM

Current Unrestricted Expenditures & Metrics

	Actual			%Change		Budgeted	%Change
EXPENDITURES	**FY21**	**FY25**	**FY26**	1yr	5yr	**FY27**	1yr
Instruction	$3,560,458	$4,275,468	$4,509,139	5%	27%	$4,781,781	6%
Academic Support	$1,167,277	$1,894,807	$1,798,818	-5%	54%	$1,980,197	10%
Student Services	$836,895	$895,493	$1,056,688	18%	26%	$1,166,981	10%
Institutional Support	$909,471	$1,294,502	$1,389,360	7%	53%	$1,445,517	4%
Operation & Maintenance	$901,041	$953,196	$926,674	-3%	3%	$953,908	3%
Research	$0	$0	$0	-	-	$0	-
Public Service	$0	$0	$0	-	-	$0	-
Scholarships	$34,494	$241,988	$234,229	-3%	579%	$244,909	5%
Total CU Exp (net of waivers)→	**$7,409,637**	**$9,555,454**	**$9,914,909**	4%	34%	**$10,573,293**	7%
Student FTE	657	713	731	3%	11%	738	1%
Key Metrics							
% Instruction Exp	48%	45%	45%	1%	-3%	45%	0%
% Instruct/Acad/Stud Ser	75%	74%	74%	0%	-1%	75%	1%
Expenditures per Student	$11,278	$13,402	$13,563	1%	20%	$14,327	6%

- **Instruction – comprises 45% of total expenditures** **BOR target = 50%**
- **% Instruction + Aca Support + Stud Service is 75%** **BOR target = 70%**
- **Expenditures per Student – 67% of peer group median**

Helena College UM

Current Unrestricted Faculty/Staff FTE & Metrics

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

	Actual			%Change		Budgeted	%Change
STAFFING	**FY21**	**FY25**	**FY26**	1yr	5yr	**FY27**	1yr
Contract Faculty (all)	33	44	42	-4%	28%	47	11%
Contract Administrators	1	1	1	0%	-29%	1	0%
Contract Professionals	11	13	15	12%	35%	16	6%
Classified FTE	29	26	27	7%	-5%	29	7%
Total Faculty/Staff	**74**	**84**	**86**	2%	15%	**93**	9%
EXPENDITURES							
Personnel Services	$5,649,556	$7,142,957	$7,661,992	7%	36%	$8,229,132	7%
Total Expenditures (net of waivers)	$7,409,637	$9,555,454	$9,914,909	4%	34%	$10,573,293	7%
Student FTE	657	713	731	3%	11%	738	1%
Key Metrics							
Student to Faculty Ratio	19.8	16.2	17.2	6%	-13%	15.7	-9%
%Personnel Services of Total	76%	75%	77%	3%	1%	78%	1%

- **Student to Faculty Ratio – budgeted for 16 to 1, peers = 14 to 1**
- **Personal Services % Share – budgeted for 78%, HECA* benchmark = 75%**

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

Helena College UM

Discounts, Waivers & Scholarships

	Actual			%Change		Budgeted	%Change
DISCOUNTS/WAIVERS/SCH	**FY21**	**FY25**	**FY26**	1yr	5yr	**FY27**	1yr
BOR Designated	$19,545	$65,806	$50,462	-23%	158%	$53,500	6%
Resident Discretionary	$20,361	$20,338	$9,061	-55%	-55%	$13,500	49%
Non-resident Discretionary	$0	$0	$0	-	-	$0	-
Scholarships	$34,494	$49,977	$63,000	26%	83%	$70,000	11%
Total Discounts/Waivers/Sch	**$74,400**	**$136,121**	**$122,523**	-10%	65%	**$137,000**	12%
Student FTE	657	713	731	3%	11%	738	1%
Key Metrics							
Waivers per Student FTE	$113	$191	$168	-12%	48%	$186	11%
Net Tuition Per Student FTE	$2,680	$2,734	$2,966	8%	11%	$2,952	0%

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

Helena College UM

Fiscal Year Student FTE - Average Annual Enrollment

	Actual					Budgeted	26 vs 27	Fall 2026
ENROLLMENT	FY22	FY23	FY24	FY25	FY26	FY27	%Change	YOY
Resident Undergrad	634	645	674	681	708	728	3%	3%
Resident Graduate	0	0	0	0				
Non-resident Undergrad	15	13	17	18	18	8	-56%	6%
WUE	10	15	20	14	5	2	-60%	-67%
Non-resident Graduate	0	0	0	0				
Student FTE Total	659	673	711	713	731	738	1%	3%

*Fall 26 YoY comparison with Fall 25 as of 9/15

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: 1.0% increase**
- **Fall 2026: 3% increase compared to Fall 2025 (YOY)**