

BARRIER IDENTIFICATION FORM

BARRIER: The late distribution of E-tuition dollars makes it difficult for units to utilize funds in ways that most benefit the students who pay those dollars.

HOW IDENTIFIED: Discussion by team members representing all divisions of the university.	ASSIGNED TEAM: Liz Baker, Chair, Amber Smallwood, Rick Sears, Ron Richards, Rebecca Smith	TYPE OF BARRIER: Policy/Practice
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SUMMARY OF BARRIER TEAM FINDINGS: *(Include all data collected to support barrier assumption)*

In FY2014, the initial E-tuition allocation was based on 90% of the following: 100% of fall 2012 and spring 2013 funds plus 40% of summer 2013. This approach provided departments with 84% of their funding in the fall (2013) versus 35% (fall 2012). Although this was a significant improvement from prior years, academic departments did not have sufficient time to spend the allocation when a portion of their estimated earnings was not allocated until March/April. The summer allocation that occurred during March 2014 represented a third of the total unspent/uncommitted balance as of April.

STRATEGIC IMPERATIVE AFFECTED: *(How will removing this barrier advance the strategic imperative?)*

Operational Success: With the ability to budget funds in advance, the flurry of spending at the end of the fiscal year could be reduced and resources could be utilized a way that maximizes the benefit to students.

RECOMMENDED ACTION PLAN:

As more experience with the split-summer revenues and the change in refund deadlines is gained, the Office of Budget Services is expected to improve the total revenue estimate. However, we are cautioned that the budget office does not control class schedules or student enrollments so some conservativeness is still advised. Additionally, the following suggestions are proposed:

1. August 1-10: Continue sharing the initial allocation the beginning of August based on the Budget and Provost offices' revenue estimate. Approximately 90% of the anticipated annual revenue (which includes summer) will be allocated in August.
2. September 15-30: When the spring class schedule is due to the registrar, review the annual estimate.
3. October 7-15: Review fall census data. Prepare an adjustment to the allocation based on actual summer collections; revised fall revenue estimate; and spring class schedules.
4. October 15-20: Distribute funding adjustments to departments if needed.
5. January 15-20: Pull most current enrollment/class data for spring; Prepare an adjustment to the allocation based on actual fall collections and spring enrollments.
6. February 1-5: Distribute adjusted allocation to departments if needed.
7. April 1-5: Prepare adjustment allocation for spring actuals and revised upcoming summer estimate (May & June). Distribute final allocation. Adjustments to actual summer revenues will occur in the follow year's initial allocation.

ANTICIPATED CHALLENGES:

- Coordinating the collection of data and preparing analysis given the short turnaround time.
- Accuracy of summer class schedules provided in the previous fall.

POTENTIAL OPPORTUNITIES:

- Improving the timeliness of departments receiving funding
- Reducing the amount of year-end spending rush.
- Providing time for more strategic use of resources
- The Provost office is committed to continually look for opportunities to improve the efficiency and accuracy of this process.

EXPECTED OUTCOME/METRIC: *(What outcome are we expecting? How will it be measured?)*

- Provide the opportunity for more consistent spending of revenue throughout to fund the cost of on-line classes. Measure the percent of funding remaining unspent in January, April, and June.
- Provide better data regarding the use of funding to determine/support the appropriate rate charged. Measure the percent of funding used for direct instruction versus academic support.

FOLLOW UP DATES:

February & June – review percent of allocation spent and % of revenue allocated.

PRIORITY SCORE:***Types of Barriers:**

-Communication/Attitude -Physical/Architectural
 -Technological -Funding
 -Policy/Practice

Priority Score:

1 = Low 2 = Moderate
 3 = High 4 = Very High