

CPBAC – College Planning, Budgeting, and Analysis Committee
03-26-21 | 8:30-9:30 am | G45/46 for CPBAC members / Webex for guests

Members in attendance:

Dave Bonilla	Chief Technology Officer
Mary Kay Bonilla	Chief Student Affairs and Human Resources Officer
Andrea Fossen	Staff Senate
Leanne Frost	Executive Director of Instruction
Leah Habel	Director of Financial Aid
Shannon Marr	Director of Recruitment and Enrollment
Marla McFerrin	Faculty-at-Large
Ben McKinley	Classified Staff-at-Large
Kathy Meier	Director of Disability Services
Charla Merja	Director of Academic Success
Russell Motschenbacher	Director of Health Sciences
Eleazar Ortega	Institutional Researcher and Data Analyst
Jana Parsons	Faculty Senate Chair
Carmen Roberts	Executive Director of Operations
Joel Sims	Director of Trades
Gary Smart	Director of Facilities Services
Troy Stoddard	Director of Advising and Career Center
Karen Vosen	Classified Staff-at-Large
Dena Wagner-Fossen	Registrar
Susan Wolff	CEO/Dean
Mandy Wright	Director of Library Services, Assessment, and Teaching & Learning Center

Members not in attendance

Tammie Hickey	Interim Director of Lifelong Learning
Scott Thompson	Director of Communications and Marketing

Introduction – Carmen Roberts

Carmen Roberts opened the meeting and reviewed the agenda.

**Strategic Goal 2.a. – Jeri Pullum - Special Projects
(see attached)**

Tom Oakberg will join CAAAC as the faculty representative.

Strategic Goal 2: Increase enrollment and retention of General Education and General Studies students to ensure sustainability.

Strategic Goal 2.a: Implement an integrated educational model to help reduce the time to graduation and increase satisfaction.

At this point the model is the 8-week scheduling model. Per Leanne Frost, General Education and General Studies students were chosen for the metrics because those students tend to have lower persistence and completion rates. There are no metrics yet to measure.

Jeri reported on the various activities that CAAAC is involved in, noting that the full strategic plan is monitored even though only one sub-goal is addressed at CPBAC each month. CAAAC has been involved in disaggregating data in order to identify equity gaps because both Perkins and NWCCU are requiring this.

Budget FY 20/21

Revenue

We budgeted for 10% decline in enrollment. Spring 21 we were one of two institutions with an increase in FYE. Total revenue is \$33,568 less than our budget, but still have 3 months to make up shortfall.

Expenditures

At 75% through the year, we are 63.8% through budgeted expenditures. Anticipate utilizing surplus funds to cover costs of dental clinic equipment.

State Appropriations

75% of our total revenue comes from the state.

Ms. Roberts reviewed information provided by the Board of Regents of 1) how state appropriation is determined and 2) how that appropriation is allocated among campuses.

1) How state appropriation is determined

The legislature determines the lump sum amount to be allocated to the MUS system, and the Board of Regents determines how that lump sum is allocated among the MUS campuses. Each campus, then, submits Base+ information to the governor's office.

- Base (what was received last biennium) + Present Law Adjustments (inflationary costs)
- New Proposals
- Shared Policy Goals/MOUs

This year the legislature will provide present law for the second year of the biennium, *but not for the first*. This will increase our base for the next biennium. However, the state will provide a two-month health plan premium holiday. HB 2 will define our allocation, potentially by the second week in May.

2) How the lump sum is allocated among MUS campuses

Several items are taken off the top (ex: OCHE, agencies) and the rest is divided among campuses based on Base Plus and Performance Funding.

Performance funding is the portion of funding tied to various performance metrics which receive a weighted score. \$15M is allocated among campuses based on the campus' share of resident FTE.

The potential allocation for GFC is \$606,283. In AY20 our major hit was in degrees/certificates awarded, which resulted in FY22 performance based funding of \$241,154 of possible \$606,283 (40%).

Any money left on the table is returned to OCHE and it is unknown at this point how it will be spent.

FY21/22

Revenue

Snapshot today: total revenue estimate is \$10,199,148

\$7,331,878 (total state support) + \$2,868,270 (total tuition and other) = \$10, 199,148

Expenditure Changes include shift of cost of 1-2-Free to campus, accreditation and program site visits increase, property and liability insurance increase, 2 month health insurance premium holiday decrease. Net is increase in operating budget (\$165,600) and decrease in personal services budget (\$379,338)

Shortfall as submitted is \$115,518

Strategic Planning

Campus Update

March 26, 2021

Mission

Great Falls College MSU provides high quality educational experiences supporting student success and meeting the needs of our community.

Strategic Planning 2016-2022 Monitoring and Reporting

College Assessment, Analysis and Accreditation Committee

Eleazar Ortega, Institutional Researcher and Data Analyst

Dena Wagner-Fossen, Registrar

Jeri Pullum, Special Project Coordinator

Mandy Wright, Director of Library Services, Assessment, and Teaching & Learning Center

Carmen Roberts, Director of Operations

Russell Motschenbacher, Health Sciences Division Director

Tom Oakberg, Mathematics Department Chair

Updated March 2021

Strategic planning focus for 2021

Strategic Goal 2: Increase enrollment and retention of General Education and General Studies students to ensure sustainability

Strategic planning focus for March

Strategic Goal 2.a

Implement an integrated educational model to help reduce the time to graduation and increase satisfaction.

Metrics:

Within five years, increase by 10% the proportion of General Education and General Studies students who graduate within 150% time.

Within two years, 75% of student survey respondents will report positive experiences on the integrated educational model survey (ability to work, focus on classes, manage homework, feeling prepared).

Operational Plan Metrics

Metric 1: Graduation rate for General Studies students

Definition	Fall 2014 Cohort	Spring 2015 Cohort	Fall 2016 Cohort
150% Graduation Rates of New, Full-time and Part-time General Ed and General Studies degree-seeking students	New, full-time 17.3%	New, full-time 17.5%	New, full-time 19.7%
	New, part-time 0%	New, part-time 6.7%	New, part-time 5.6%

Operational Plan Metrics

Metric 2: Student survey results

- Fall results not finalized

Committee activities

- Student survey
- Assisted with NWCCU Quality Culture Project survey
- Monitor strategic plan goal/subgoal activity and progress
- Work with director of assessment
- Accreditation report
- Disaggregating data to identify equity gaps



CPBAC

3-26-21





BUDGET

FY 2021



Revenue

	Budgeted	Actual	Difference	Rate
Summer Tuition	216,477	211,207	-5,270	-2.23%
Fall Tuition	1,134,265	1,100,290	-33,975	-2.99%
Spring Tuition	1,028,805	1,122,298	93,493	10.26%
Total Tuition	2,379,547	2,433,795	54,248	2.81%
State Allocation	7,713,743	7,713,743	0	
Other	431,393	343,577	-87,816	-55.45%
Total Revenue	10,524,683	10,491,115	-33,568	0.64%

Expenditures

75% through the year

63.8% through
budgeted expenditures

	Budgeted	Actual	Remaining	Rate
Personal Services	8,972,050	5,716,645	3,255,405	63.7%
Operating Expenses	1,552,633	1,012,077	540,556	65.2%
Total	10,524,683	6,728,722	3,795,961	66.8%

QUESTIONS ON FY21?



State Appropriations

Allocation Process

March 2021

MUS Educational Unit Funding

Questions:

- #1 How is the State Appropriation for the MUS determined?*
- #2 How are campus allocations determined?
(including Performance Funding procedures)*

MUS Educational Unit Funding

(a.k.a Program 9 - Appropriation Distribution)

Question #1: How is the State Appropriation for the MUS determined?

- **Legislative Appropriation:** Lump Sum Funding to the MUS – since 1995
- **Base + Present Law Adjustments**
 - Statewide Fixed Costs – insurance-tort, legislative audit, ITSD
 - Personnel Costs - annualized pay plan, health insurance, merit/market, leave payouts
 - Higher Ed Specific PLA –IT maintenance, utilities, journals, compliance/safety, rent
 - New Space O&M
 - Pay Plan
- **New Proposals** –Base or OTO: examples: transferability, workforce equipment, veterans' success, distance learning, research initiative
- **Shared Policy Goals/MOUs**
 - Tuition Freeze/CCA Metrics/Performance Funding – 2013
 - Tuition Freeze/Performance Funding Continuation – 2015
 - Efficiency Metrics, State Support per Resident Student – 2017
 - Tuition Freeze/Career & Technical Education – 2019

Board of Regents' Distribution of the Lump

Question #2: *How are campus allocations determined by MUS?*

- Biennial distribution following conclusion of legislature, in conjunction with setting tuition and fees.
- Base Plus w/ Allocation Drivers PLUS Performance
- Base year minus Performance Funding (\$15M per year)

- **Base Plus:** Additional funding allocated based on multiple measures/drivers
 - Present Law Adjustments
 - Pay Plan
 - Tuition Freeze Backfill (3% revenue)
 - Campus Share of Res Enrollment
 - Campus Share of base budget (cuts)
 - State Support per Resident
 - % state share
 - Total revenue per student
 - Peer comparisons

- **Performance Funding**
 - Seven-year allocation history in MUS: \$15M per year since FY16 (\$7.5M in FY15)
 - Incentive funding to improve Retention & Completion (Student Success)
 - Specific metrics related to Mission (Flagships = Graduate degrees and research)
(2-year College = remedial success and dual enrollment)
 - Increased incentive associated with on under-represented at-risk student groups
(American Indians, Veterans, Low-income, and Non-traditional students)

Performance Funding History

1. **From 1972 through 2014:** enrollment was utilized as the single metric for determining the allocation of state appropriations to campuses.
2. **FY 2015:** the MUS instituted a performance funding model.
 - 5% state appropriations allocated (\$7.5M)
 - Performance based on the combination of improvement in Retention and Completions
3. **FY 2016 – Present:** MUS developed and implemented a more detailed and diverse performance model.
 - \$15M of state appropriations allocated annually (approx. 7.5% of total approp.)
 - Metrics expanded and aligned with campus mission

The potential allocation for each campus is based on its share of the system's 3-year resident student FTE average

Campus	Resident FTE (FY18 to FY20 average)	Campus Share of Resident FTE	Eligible \$\$ Amount
MSU Bozeman	8,740	36.4%	\$5,458,834
Gallatin College	429	1.8%	\$267,761
MSU Billings	2,308	9.6%	\$1,441,379
City College	614	2.6%	\$383,299
MSU Northern	860	3.6%	\$537,059
Great Falls College	971	4.0%	\$606,283
UM Missoula	5,700	23.7%	\$3,560,037
Missoula College	939	3.9%	\$586,295
MT Tech	1,357	5.6%	\$847,383
Highlands College	295	1.2%	\$184,050
UM Western	1,038	4.3%	\$648,339
Helena College	767	3.2%	\$479,280
Total	24,015	100.0%	\$15,000,000

Performance Funding Goals

- 1) Utilize performance funding as a strategy to help increase the percentage of the population with a higher education credential. ***Increase degree production.***
- 2) Incentivize campuses to improve student success and attainment of outcomes. ***Focus on output as well as input.***
- 3) Connect finances with outcomes. ***Pay for what we value.***

2. Each sector (flagship, 4-yr and 2-yr) has a unique set of metrics

	Flagships MSU & UM	4-year Regional UMW, MT Tech, MSUB, MSUN	2-year Colleges Missoula, Great Falls, Highlands, Helena, City, Gallatin
METRICS			
Undergraduate Degrees & Certificates Awarded	X	X	X
Retention Rates	X	X	X
Graduate-level Degrees & Certificates Awarded	X		
Research Expenditures	X		
Masters-level Degrees & Certificates Awarded		X MT Tech & MSUB	
Dual Enrollment		X UMW & MSUN	X
Remedial Success			X
Credit Accumulation			X
Under-represented/At-risk - Retention Rates	X	X	X
Under-represented/At-risk - Degrees & Certificates Awarded	X	X	X

3. Metrics are measured annually and compared to prior 3-year average.
CAMPUSES compete against themselves!

4. Metric values are weighted.

METRICS	Flagships	4-year Regional	2-year Colleges
Undergrad Degrees & Certificates	30%	40%	30%
Retention Rates	30%	40%	30%
Graduate Degrees & Certificates	15%		
Research Expenditures	15%		
Masters Degrees & Certificates		10% (MT Tech & MSUB)	
Dual Enrollment		10% (UMW & MSUN)	10%
Remediation Success			10%
Credit Accumulation			10%
Under-represented/At-risk			
Retention Rates	5%	5%	5%
# of Degrees & Certificates Awarded	5%	5%	5%

Great Falls College MSU

	3-yr Average	Current Level	% Increase	Index Score	Weight	Weighted Score
Degrees/Certificates Awarded	430	286	-33%	665	30%	200
Under-Represented/At-risk Graduates	352	234	-33%	665	5%	33
Retention Rates	56%	55%	-2%	978	30%	293
Under-Represented/At-risk Students	56%	55%	-2%	977	5%	49
Dual Enrollment	795	694	-13%	873	10%	87
Remedial Success	32%	48%	50%	1503	10%	150
Credit Accumulation	43%	44%	2%	1023	10%	102
TOTAL						915

Growth Target	1,010
Transitional-zone Minimum	852
% of Eligible Funding	40%

FY22 Performance Based Funding=\$241,154 of possible \$606,283

FY 2022 Operating Budget Revenue Estimate

State Allocation

Estimated flat allocation

\$365,000 PF reduction

Total State support=\$7,331,878

Tuition & Other

Tuition & Fees: Flat enrollment & 3%
tuition increase

Transfers: ASGFCMSU, Reserves

Donations: Respiratory Care Support

Other: Interest, misc. fees

Total Tuition & Other=\$2,868,270

Total Revenue Estimate=\$10,199,148

FY 2022 Operating Budget Expenditure Changes

1-2-Free

Accreditation Visit

Programmatic Accreditation Visits

Resumption of Travel?

Property & Liability Insurance Increase

Health Insurance Premium Holiday

FY 2022 Overall Outlook

Shortfall as submitted	\$115,518
------------------------	-----------