

University of Idaho

Division of Finance

debbiee@uidaho.edu

www.uidaho.edu/finance

TO: University of Idaho Faculty and Staff
FROM: Brian Foisy, Vice President for Finance
DATE: September 21, 2017
SUBJECT: University Budget & Finance Committee Priority List

As part of our annual budget and planning cycle, the University Budget and Finance Committee (UBFC) - a standing committee of the Faculty Senate - is charged with soliciting and evaluating requests for new funding (both one-time and ongoing). This process includes requests for FY2018, and is also designed to inform the State Board budget setting process for FY2019. The purpose of this memo is to explain the UBFC ranking methodology, and identify the proposals that have been selected for some level of funding (we will continue to fund other proposals as opportunities and funding are identified).

Within the UBFC, teams of three randomly appointed committee members evaluated each proposal on a scale from 4 (best) to 1 (worst). This step was used only to provide preliminary rankings for each proposal. The committee then held a series of five extended meetings to further review, discuss, and evaluate each proposal. Not all committee members were present at every meeting, but a quorum was required for each vote. After each meeting, committee members reviewed a list of results to correct for any oversights or clerical errors. The final report was approved by the voting members of the committee and submitted to the Faculty Senate and university administration.

Proposals were evaluated based on strategic plan goals, legal or regulatory compliance obligations, and administrative support requirements. Requests were ultimately categorized in three groups:

- LESS RECOMMENDED – Proposals in this category were not supported by a majority of UBFC members.
- HIGHLY RECOMMENDED – Proposals in this category were supported by a majority of UBFC members.
- HIGHEST RECOMMENDATION – Proposals in this category were also supported by a majority of UBFC members, but received an additional and unanimous vote to be elevated to the highest recommendation.

The committee received almost 100 requests, and ultimately narrowed the list down to 31 final recommendations (3 highest recommendations and 28 highly recommended items). All requests were considered by university administration, with special focus placed on the top two categories. A number were selected for funding based on internal and other resources (reference numbers listed in parenthesis):

Submitted for consideration during the 2018 regular legislative session - \$2,121,200

- Library Non-Standard Inflation (#26), SciFinder Scholar Subscription (#28), Libraries Support Student Success (#29)
- Case Managers and Crisis Response (#68), Raven Scholars Program (#15), Assistant Greek Life Advisor and Leadership Development (#54), Student Affairs Case Managers and Crisis Response (#68)

Funded by program prioritization reallocations - \$4,000,000

- In-State Tuition and Fees for Teaching Assistants (#69)
- Market-Based Compensation for Faculty and Staff (#87)

Funded by annual gainsharing process - \$1,800,000

- Faculty Startup Package Program (#14)
- Idaho Advising Corps (#25) – also received VIP funding of \$75,000
- CAA Technology Upgrades (#31)
- Travel and Expense Application (#46)
- UCM Marketing Program (#61)
- Graduate Student Campus Visit Support (#74)

Funded by Provost's Office and central reallocations - \$3,350,000

- Undergraduate Research Base Funding (#07)
- IEA Staff Addition (#06)

- Military Student Services and Partnership Director (#33)
- Academic Affairs Salary Gap Funding (#36)
- Director of Distance and Extended Education (#62)
- Center for Excellence in Teaching and Learning (#65)
- SEM Web Programmer (#66)
- Salary Adjustments for Recruiting Staff (#67)
- Pilot Funds for New Academic Programs (#71)
- Vice Provost for Academic Initiatives (#72)

Considering one-time and ongoing funds from all sources (including reallocations), the institution has committed \$11,271,200 to the items identified above. University administration will continue to review the additional recommendations, based on availability of resources.

Many of the UBFC recommendations were also intended as potential legislative requests. The legislative request process begins in late spring and is largely completed by early fall. This process is strongly influenced by the State Board of Education, and by information about the initiatives that the governor and Legislature are most likely to support. For FY19, the two UI legislative budget requests were selected from the UBFC priority list. As noted on page one of this memo, during the upcoming legislative session, UI will seek support for various student affairs initiatives and library expansion in support of the Carnegie R1 (highest research activity) classification.

Finally, we will be working with UBFC this year to reset expectations related to the timing of the gainsharing and UBFC funding announcements. Year-end closing processes are completed in July of each year, meaning year-end balances and associated gainsharing calculations are not finalized and available until August. Since the annual gainsharing process funds a portion of the UBFC priority list, the campus community should expect to receive future gainsharing and UBFC notifications in the fall of each year.

We would like to thank all who participated in this process. It has provided critical information regarding those initiatives important to the University community, and will broaden participation in the process of investing in UI's future.
