

University Senate Committee on Planning and Resources (P&R)
Final Report 2022-2023

Committee Membership

David Slusky, Economics, Faculty, 2023 (Chair)
Nils Gore, Architecture, Faculty, 2024
Geraldo Sousa, English, Faculty, 2023
Jin Feng, Mathematics, Faculty, 2024
Ward Lyles, Urban Planning, Faculty, 2025
Lisa Koch, Transportation Center, Staff, 2025
Whitney Juneau, Architecture & Design, Staff, 2024
Bradley Schroeder, Aerospace Engineering, Staff, 2024
Nathaniel Garcia, Voting Student
Derek Mull, Voting Graduate Student,
Corinne Bannon, Vice Provost of AIRE & Chief Data Officer, Ex-officio
Jason Hornberger, Vice Provost for Finance, Ex-officio

The sections that follow address committee activities and recommendations with respect to our standing and specific charges for the year. The committee will need at least two new faculty representatives and one new staff representative next year.

FY2023 Standing charges

1. Participate in the University's planning processes by communicating with the Provost, CFO, and Provost's senior staff on matters of capital strategic planning, infrastructure, IT resources, and sustainability, and examine how current financial circumstances (the health of the state economy, current university indebtedness, school-specific fees and charges, etc.) will influence such projects. Report issues and any recommendations for action to Sen Ex.

Committee Activities

- This year was a relatively quiet year for broad budgetary concerns, compared to past years involving tax cuts, complex new budget models. major budget cuts, or widespread new cost and campus disruptions due to the COVID-19 pandemic
- The committee received live updates from both Vice Provost Jason Hornberger and Executive Vice Chancellor and CFO Jeff DeWitt
- Overall discussions covered a variety of issues including the five-year no-budget cuts plan, competitive pay, the campus master plan, a 5-year IT plan, and the Jayhawk Welcome Center.
- The committee also had specific ad hoc discussions regarding the 11th and Mississippi plan and the rpk KBOR review of academic programs, including meeting with then Faculty Senate President-Elect Professor Nate Brunsell

Committee Recommendations:

- From December 12, 2022 to the University Senate to convey to the Chancellor, regarding the 11th and Mississippi project:
 - "Currently, the overwhelming majority of those impacted by this project have no voice in it. A project of this magnitude that is right on the edge of campus should have formal involvement of those that will be impacted, including KU faculty, staff, and student governance; the neighborhood associations; city elected officials who have to make capital decisions; city staff; leadership of other concurrent KU development projects; and business owners and associations."
- This recommendation should be followed up on in the fall to ensure this broad planning committee is set up, with the goal of maximizing the project's probability of success
- Overall monitoring of this project should be added a specific charge for AY 2023-2024

2. Host meeting with Provost, CFO, and the Provost's senior staff to review planning reports and budgetary submissions made by the various units. Report issues and any recommendations to SenEx for consideration.

Committee Activities

- The committee reviewed the budget model overview with both Vice Provost Hornberger and Executive Vice Chancellor DeWitt
- Much of the efforts in the spring were preparing for a public forum with the CFO in April, where the CFO would preview his May KBOR presentation, followed by questions from the audience.
- The forum was advertised as an opportunity to
 - Attend the forum to learn more about:
 - How KU will incorporate the Kansas governor's budget into its financial planning
 - Strategic enrollment management
 - All-Funds Initiative
 - Continuous Improvement Program
 - The ongoing competitive pay study
- The announcement about the forum would also have included a link to the Chancellor's weekly video about the budget and a place to submit questions in advance
- This forum was postponed to the fall given the uncertainty around the state budget from the legislature

Committee Recommendations:

- Ensure the forum happens early in the fall semester, which could also be added as a specific charge for the committee for AY 2023-2024
- Request earlier and in more detail the budgetary submissions made by various units, so that a more detailed review can be incorporated in the committee's operations

3. Monitor enrollment trends and changes in tuition plans and their potential effects on enrollment and revenue generation.

Committee Activities:

- The committee discussed enrollment trends extensively with Vice Provost Bannon at its meetings
- These included numerous recent factors, including the 2022 NCAA men's basketball championship, COVID-19, changes in test score requirements, housing, and the new Panasonic plant
- The committee discussed potential tuition increases when Executive Vice Chancellor DeWitt attended. The overall principle was that the university would request a tuition increase if it were necessary budgetarily after the state budget is complete. The understanding is that the governor's office and KBOR will accept a small increase (under 3% or under 2.5%, respectively).

Committee Recommendations:

- None

FY2023 Specific charges:

1. Follow up on the implementation and analysis of the Budget model, focusing on transparency across the campus. Assess whether the revised budget model meets the outcomes that were projected.

Committee Actions:

- Discussed budget model with Vice Provost Hornberger, including
 - General Fund Allocation method
 - Moving away from a historical incremental model and working towards aligning allocations with campus activity
 - FY2022: differential budget cuts rather than across-the-board budget cuts
 - FY2023: no budget cuts
 - FY2024: some units are always going to have to be subsidized (not enough enrollment)
 - Goals: decrease structural deficit; address competitive pay
 - Sources assumptions: tuition growth (tuition rate increase or SCH increase); 1.5% SGF increase
 - Uses assumptions: employee merit; OOE increase; health insurance increase; utilities cost; faculty promotion and tenure; scholarship support
 - Jayhawk Global tuition earnings
- Discussed how academic portion of allocation model is only instructional and does not include any metrics or data on research

Committee Recommendations:

- Repeat charge again next year
 - Add a specific component to budget model to explicitly incorporating faculty research output into the budget model, as tenure-stream faculty have time allocations that are equal shares research and teaching, yet the budget model only formally reflects teaching
2. Meet with the CFO in Fall 2022 and spring 2023, to obtain update on the university's strategic financial planning, and initiatives (see final report from FY2022)

Committee Actions:

- The committee was not able to meet with the CFO (Executive Vice Chancellor DeWitt) in the fall 2022, but planned to meet with him twice in spring 2023, once in a committee meeting and once in a public forum
- Numerous items were discussed in the committee meeting, including the state budget, strategic enrollment management, all funds initiative, 11th and Mississippi project, competitive pay study, tuition increases, campus master plan, and a continuous improvement program.
- As discussed above, the April public forum with the CFO was postponed to the fall given the uncertainty around the state budget.

Committee Recommendations:

- This charge seems redundant with the standard charges above, so the recommendation is to discontinue it for AY 2023-2024