Thriving in a Decentralized Budget Model
Data-Driven Approaches to Academic Resource Management

Temple University
October 30, 2014
More Than Just A Flow of Funds

Budget Models Support (or Don’t) Institutional Priorities

To many it’s just dollars and cents…

…but budgets express the university’s most important goals and priorities

- How do we strike a balance between teaching and research?
- How much financial aid can we afford to give out this year?
- How much should we devote to athletic programs?
- What is the right faculty to student ratio?
- How many adjuncts are too many?
- Which academic programs are our top priority?
### A Model That No Longer Works

Incremental Budgeting Ignores Differential Opportunities and Costs

#### Revenue Growth Allocated Equally Despite Different Needs and Opportunities

<table>
<thead>
<tr>
<th>College of Engineering</th>
<th>College of Business</th>
<th>College of Education</th>
<th>College of Health</th>
</tr>
</thead>
<tbody>
<tr>
<td>2.2%</td>
<td>2.3%</td>
<td>2.0%</td>
<td>2.1%</td>
</tr>
</tbody>
</table>

- Trying to raise research profile
- Overstaffed with declining enrollment
- Unable to grow despite demand

#### Advantages
- Simple for academic leaders to understand and manage
- Equitable sharing of resources reinforces campus culture
- Minimal disruption from year to year minimizes political squabbling

#### Disadvantages
- No link between investments and outputs
- Creates disincentives to grow revenue or control costs
- Difficult to maintain when revenues no longer growing

66% Proportion of universities using incremental budgeting

Source: “IHE Survey of College & University Business Officers” 2011
Why Change?
Desire for Growth and Transparency Drive Budget Model Shifts

Financial Changes Motivating Most Budget Model Transitions

- **Taskforce Considers Budget Alternatives**

- **Pressure on Funding**
  “As the nation’s public universities receive less state support, they are finding it necessary not only to develop new sources of funding, but to adopt new budget approaches”

- **Rising Ambitions**
  “If Kent State is to become an academically and financially stronger institution, it must rethink how financial resources are allocated, transferring a greater role in these decisions to academic leaders and faculty. “

Revenue and Transparency Are Leading Justifications for Changing Budget Models

*Budget Taskforce Reports (n=40)*

- **Incentivize Revenue Growth** 80%
- **Improve Transparency** 67%
- **Control Costs** 60%
- **Increase Strategic Fund** 53%

Source: “Review of Budgetary Methods and Roles at Kent State University.” 2007 Kent State; EAB interviews and analysis
“Unleashing the Deans”

Growing Number of Institutions Adopting Decentralized Models

1970s
University of Pennsylvania
University of Southern California
Washington University St. Louis

1990s
Central Michigan University
Duke University
Indiana University-Bloomington
University of Illinois Urbana
University of Michigan-Ann Arbor

2000s
Brandeis University
Ohio State University
Okanagan College
University of New Hampshire
University of Minnesota
University of Utah

2005s
Iowa State University
Kent State University
Marquette University
Rutgers University
Southern Oregon University
Syracuse University
University of Toronto

2010s
McMaster University
Northeastern University
Ohio University
Queens University
Texas Tech University
University of Delaware
University of Florida
University of Oregon
Wright State University

Planned for 2014 and Beyond
Auburn University
Cornell University
George Washington University
Ohio University
Temple University
University of Arizona
University of Delaware
University of Florida
University of Michigan-Ann Arbor
University of Minnesota
University of Oregon
Youngstown University
University of Virginia

Source: EAB interviews and analysis
Mitigating Potentially Misaligned Incentives

Simple Solutions to Common Complaints About Decentralized Models

<table>
<thead>
<tr>
<th>Common Concern</th>
<th>Typical Solutions</th>
</tr>
</thead>
<tbody>
<tr>
<td>Competition for students</td>
<td>Split-revenue models and curricular review committees blunt incentives</td>
</tr>
<tr>
<td>Departments incentivized to create low quality classes</td>
<td>Curricular review committees, faculty senate oversight blunt incentives</td>
</tr>
<tr>
<td>Financial barriers to multidisciplinary work</td>
<td>Standardized MOUs, financial incentives, and startup funds ease collaborations</td>
</tr>
<tr>
<td>High cost to teach programs disadvantaged</td>
<td>Course fee and weighted credits compensate high cost programs</td>
</tr>
<tr>
<td>Small programs unable to finance operations</td>
<td>Subvention funding provides resources to support small units</td>
</tr>
<tr>
<td>Enrollment incentives at odds with completion agenda</td>
<td>Incorporate performance funding into allocation models</td>
</tr>
<tr>
<td>Limited resources for institution-wide initiatives</td>
<td>Subvention and revenue recapture pool resources for investments</td>
</tr>
</tbody>
</table>

Source: EAB interviews and analysis.
Life After RCM

The Four Stages of Adjustment to Decentralized Budget Models

Anger
“Can’t believe you’re charging us for the library!”

Bargaining
“Can’t we just raise tuition to bring in more revenue?”

Acceptance
“So what’s this whole online masters thing all about?”

Adaptation
“Why does the IR office take so long to get data back to us?”

Focus
Admin Service Costs
Tuition Price
Alternative Revenues
Business Development

Common Responses
- Administrative Functional Reviews
- Differential Tuition
- New Programs
- New College-level Staff
- Shared Services
- New Course Fees
- Public-Private Partnerships
- Demand for IT and analytics capacity

Source: EAB interviews and analysis.
The Greatest Threat to Sustainability

Most Institutions Struggling to Maintain Tuition Revenue

- I am concerned about meeting my institution's new student enrollment goals this year
- Increases in the discount rate have decreased my institution's net tuition revenue

Student Success as Revenue Generator

Improved Retention the Greatest Revenue Opportunity for Most Universities

Projected Revenue Gains Due to Improved Retention
Public Doctoral University, Enrollment 15,000

Model Inputs
Total Enrollment: 15,005
Net Rev Per Student: $18,760
(net tuition and fees plus state appropriations)

Revenue gains compound over time as incrementally retained students continue through the system

Assumed Retention Improvement
0-29 credits  2% total over 3 years
30-59 credits  2% total over 3 years
60-89 credits  0% total over 3 years
90-119 credits 0% total over 3 years
120+ credits  0% total over 3 years

87 additional graduates in 2019 as result of retention improvement

<table>
<thead>
<tr>
<th>Year</th>
<th>Enrollment</th>
<th>Net Rev Per Student</th>
<th>Revenue Gains</th>
</tr>
</thead>
<tbody>
<tr>
<td>2015</td>
<td></td>
<td>$1.9 M</td>
<td></td>
</tr>
<tr>
<td>2016</td>
<td></td>
<td>$5.0 M</td>
<td></td>
</tr>
<tr>
<td>2017</td>
<td></td>
<td>$8.2 M</td>
<td></td>
</tr>
<tr>
<td>2018</td>
<td></td>
<td>$8.9 M</td>
<td></td>
</tr>
<tr>
<td>2019</td>
<td></td>
<td>$9.0 M</td>
<td></td>
</tr>
</tbody>
</table>
Diversifying Tuition Revenue

EAB’s Research on “Future Students, Future Revenues”

Net Tuition Revenue

Exclusive Focus on Traditional Undergraduates

Sustainable Frontiers
- Low-Income, First-Gen
- International Undergraduates
- Community College Transfers
- Adult Degree Completers
- Professional Master’s

Critical Requirements
- New Program Designs
- New Student Support Services
- New Marketing Approaches
- New Online Infrastructure

Ruinous Competition
Changing the Efficiency Conversation

Emphasizing the Link Between Quality Improvement and Revenue Growth

Reframing the Solutions

- Cutting costs → Funding priorities
- Increasing effort → Focusing activity
- Reducing price → Enhancing value
- Improving efficiency → Achieving excellence
Managing in an Environment of Scarcity
Discovering Opportunities to Better Allocate Resources

The Perception of Scarcity

The Reality of Excess

Teaching
- Proliferation of niche courses, independent studies
- Not enough instructors to open bottlenecks

Research
- Course releases granted without regard for performance
- Not enough faculty/support to increase research output

Service
- Much time released for low-value activities
- Demands of admin work greater than ever
# It All Adds Up

Resources Trapped in Potentially Less Productive Uses

<table>
<thead>
<tr>
<th>Reallocation Opportunities</th>
<th>Magnitude</th>
</tr>
</thead>
<tbody>
<tr>
<td>Unnecessary Sections</td>
<td><strong>700</strong></td>
</tr>
<tr>
<td>Considerable Faculty Time Devoted to Admin</td>
<td><strong>500</strong></td>
</tr>
<tr>
<td>Enormous Number of Empty Seats</td>
<td><strong>50,000</strong></td>
</tr>
</tbody>
</table>

- Number of sections in multi-section courses that are not required to meet demand (~1/3 of total)
- Course equivalent of tenured faculty teaching time released for administration (15% of total capacity)
- Unfilled seats across all units and levels (~30K total enrollment)

- Public Research University
- Public Master’s University
- New Mexico State University

Source: EAB interviews and analysis
What’s Standing in Our Way?

Four Roadblocks to Improved Academic Resource Management

1. Incomplete, Inaccurate Data
   Data related to academic resources spread among multiple ERPs and shadow systems of varying quality

2. Ad Hoc Allocation Processes
   Even when metrics are available, deans and chairs struggle to design policy interventions to advance their goals

3. Lack of Unit-level Incentives
   Chairs (and some deans) skeptical that departments will receive benefits from their efficiency gains

4. Few Reallocation Options
   Difficult to reallocate specialized faculty from areas of low demand to areas of high demand
Finding and Reallocating Academic Resources
A Roadmap for Realizing Academic Ambitions

- Consolidate underutilized sections
- Reduce number of small courses
- Expand bottleneck courses
- Redesign high-DFW courses
- Rationalize major curricula
- Evaluate gen ed requirements
- Maximize capacity utilization
- Differentiate faculty workloads
- Create capacity for growth
- Reinvest in strategic priorities
An Easy Win
Calculating the Cost of Underenrolled Sections

Lower Division Anthropology Course

Section 1
Enrollment – 31, Maximum - 45
69%

Section 2
Enrollment – 25, Maximum - 45
56%

Section 3
Enrollment - 30, Maximum - 45
67%

Section 4
Enrollment - 17, Maximum - 45
38%

Sections 1-3
Enrollment – 36, Maximum - 45
80%

Collapsing Sections
Assuming Optimal Fill Rate of 80%

289 Superfluous sections

25% Sections taught by adjuncts

200 Adjunct credit hours

$330,000 Investment in adjuncts

75% Sections taught by full-time faculty

875 Full-time faculty credit hours

$1.5M Investment in faculty time

1) For analyses, all courses with a maximum enrollment of zero are excluded.

Source: Education Advisory Board, Gates Research Project.
Investing in the Wrong Areas?

Growth in Low-Enrollment Courses Reduces Resources

Faculty Time Spent on Small Courses
Significant – and Growing

*Share of Faculty Credit Hours Consumed by Courses of Under 10 Students, Public Master’s University*

<table>
<thead>
<tr>
<th>Year</th>
<th>2009</th>
<th>2013</th>
</tr>
</thead>
<tbody>
<tr>
<td>26%</td>
<td>33%</td>
<td></td>
</tr>
</tbody>
</table>

Net cost to university of small courses: $11M

How Else Could We Allocate These Resources?

- **Revenue**: Redeploy tenured instructors to high-demand courses
- **Student Success**: Emergency section of an upper-division course to keep students on track
- **Research**: Course releases for highly productive faculty
- **Investment**: Trim adjunct budget to develop strategic fund/seed money

Source: EAB interviews and analysis

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Separating Baby from Bathwater
Assessing the Necessity of Small Courses

Small Courses Can Be Critical to Mission and Student Success

Pedagogical Requirements
Pedagogy may necessitate smaller courses in certain majors (e.g., Music)

Independent Study
Courses with a single student may be critical for certain programs (and often given fractional credit in faculty course load calculations)

Small Courses Can Be the Result of Poor Alignment Between Schedules and Student Demand

Unpopular Courses or Majors
Low student demand leads to smaller courses

Course Proliferation
Large programs with many low enrollment “niche” courses

Source: EAB interviews and analysis
Finding and Reallocating Academic Resources

A Roadmap for Realizing Academic Ambitions

Course Offerings

Course Success

Curricular Focus

Faculty Workload

Strategic Investment
Too Many AND Too Few
Bottleneck Courses as Much a Problem as Under-filled Sections

Moving Towards the Sweet Spot

Share of Lower-Division Sections by Fill Rate, Public Master’s University

80% Lower-division courses outside the fill rate “sweet spot”

How Can We Increase Bottleneck Capacity?

New seats available from a 10% increase in capacity in high-demand courses at a public master’s university

(source: EAB interviews and analysis)
Removing Barriers to Student Progress

More Credits Than We Thought Wasted on Lower-Division Bottlenecks

The Bottleneck Course Treadmill

*Top Undergraduate Courses by Lost Student Credit Hours (Attempted Minus Earned), Public Master’s University*

<table>
<thead>
<tr>
<th>Course</th>
<th>Lost Credit Hours</th>
</tr>
</thead>
<tbody>
<tr>
<td>BIOL101</td>
<td>918</td>
</tr>
<tr>
<td>MATH112</td>
<td>1,113</td>
</tr>
<tr>
<td>MATH114</td>
<td>1,155</td>
</tr>
<tr>
<td>PSYC208</td>
<td>1,248</td>
</tr>
<tr>
<td>ENGL104</td>
<td>1,263</td>
</tr>
<tr>
<td>ENGL100</td>
<td>1,524</td>
</tr>
</tbody>
</table>

115

Additional student completions from reducing DFW rate of ENGL100 by 5%

Reduced Student Success

Poor course persistence results in lower retention and reduced graduation rates

Lost Revenue

Revenue is lost when students drop out

Wasted Capacity

High DFW’s increase course repeats and wasted credits

Source: EAB interviews and analysis
A Clear Opportunity for Improvement

High DFW Variability Within a Course Demands Further Analysis

Failure Rates Vary Drastically, Even Within a Single Course

DFW Rates by Section and by Course, Fall 2013, Public Master’s University

“"The greatest (financial) impact we can make at our institution is by focusing our attention on improving retention in our lower division courses.""

Chief Business Officer
Public Flagship Research Institution

1) All sections in graphic have a minimum of 19 students.

Source: Education Advisory Board, Gates Research Project.
Finding and Reallocating Academic Resources

A Roadmap for Realizing Academic Ambitions

- Course Offerings
- Course Success
- Curricular Focus
- Faculty Workload
- Strategic Investment
The Rococo Curriculum

Course Diversity Increasing Faster Than Enrollment

Are We Neglecting Bottlenecks in Favor of Curricular Diversity?

Increase in Enrollment, Sections, and Courses, 2009-2013, Public Master’s Univ.

- SCH Delivered: 7.1%
- Sections Offered: 3.2%
- Distinct Courses Offered: 12.5%

Substantial increase in student demand…

… But an even greater rise in new courses offered

Source: EAB interviews and analysis
A Taxonomy of Curricular Problems

Array of Curricular Issues Impacts Student Success, Increases Costs

Common Curricular Problems

Tracks and Specializations
- Often Not Required for Graduation
- Tracks May Not “Count” on Degree

Excessive Pre-Requisites
- Delay Degree Progress

Tripartite Course Sequences
- Increase Time-to-Degree
- Often Unnecessary under Semesters

Courses Not Counting For Degree
- Consume Course Time Without Progression
- Provides “Free Electives” That Often Don’t Lead to Degree

Large Lower-Division Catalog
- High Course Frequency Required
- Artificially Small Upper-Division Courses
- Upper Reaches of Sequence Typically Under-enrolled
- Longer TTD Leads to Bigger Bottlenecks
- Degrees, Not Courses, Drive Demand

Student Success Consequences

Financial Consequences

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Source: EAB interviews and analysis
The Rewards of Curricular Reform

Reducing Complexity Creates Real Benefits

Consolidation of Non-Degree Tracks...

- 5 degree tracks cut, 2 combined
- Reduced courses not counting for graduation from 16 to 0
- Reduced frequency of low-demand courses, canceled or combined 4
- Eliminated ~10 coordinator/director positions (plus releases)

Improved Both Faculty Productivity...

<table>
<thead>
<tr>
<th></th>
<th>2007-08</th>
<th>2012-13</th>
</tr>
</thead>
<tbody>
<tr>
<td>Avg. Teaching Load (Tenured)</td>
<td>3/2</td>
<td>2/2</td>
</tr>
<tr>
<td>Research/ Creative Production per FTE</td>
<td>4.4</td>
<td>8.9</td>
</tr>
<tr>
<td>Teaching/Advising Awards per FTE</td>
<td>1.3</td>
<td>10.1</td>
</tr>
</tbody>
</table>

... and Student Success

<table>
<thead>
<tr>
<th></th>
<th>2008 Cohort</th>
<th>2009 Cohort</th>
</tr>
</thead>
<tbody>
<tr>
<td>4yr Graduation Rate</td>
<td>47%</td>
<td>61%</td>
</tr>
</tbody>
</table>

Source: Iowa State University Greenlee School of Journalism, "Greenlee Facts," accessible at [https://www.jlmc.iastate.edu/greenlee-facts](https://www.jlmc.iastate.edu/greenlee-facts); EAB interviews and analysis
Earning Faculty Buy-in
Provide Tangible Returns and Avoid Unnecessary Cuts

Realize Savings as Workload Reduction
Allocate new research or service releases, or start an incentive-based release or stipend program in line with strategic plan

Limit Course-Cutting
Avoid antagonizing course “champions” by first reducing frequency and eliminating pre-requisites as a viability check for vulnerable courses

Spin Off High-Volume Tracks into New Degree Programs
The largest tracks can often support themselves as degrees, buttressed with elective depth from the “mother” program

Refuse to Allocate New Lines to “Glutted” Programs
Establishing “glut”-related benchmarks (e.g., # of majors per course must exceed 5) provides justification for later disinvestment

Source: EAB interviews and analysis
Finding and Reallocating Academic Resources
A Roadmap for Realizing Academic Ambitions

Course Offerings  Course Success  Curricular Focus  Faculty Workload  Strategic Investment
No Rest for the Weary
Faculty Facing More Hours, More Demands Across All Areas

Faculty Work Hours Comparable to Higher-Pay Professions

<table>
<thead>
<tr>
<th>Role</th>
<th>Hours per Week</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cardiologist</td>
<td>60</td>
</tr>
<tr>
<td>Full-Time Faculty(^1)</td>
<td>55.5</td>
</tr>
<tr>
<td>Associate, Corporate Law Firm(^2)</td>
<td>59.5</td>
</tr>
</tbody>
</table>

Pressures on Faculty Time Increasing in Every Area of Activity

**Teaching**
- Political pressure to increase undergraduate throughput
- Popular enthusiasm for non-traditional modalities
- Outcomes assessment increasingly time-consuming

**Research**
- Increasing grant administration demands
- Rising promotion and tenure standards

**Service/Administration**
- Department chair and dean jobs increasingly professionalized, high-skill

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1) At public doctoral institutions.
2) At national firm Latham & Watkins.

The Challenge of Accounting for Faculty Time
Large Share of Faculty Time Released or Unaccounted For

Overwhelming Majority of Faculty Don’t Work Standard Load...

Share of Faculty by Load Status¹, Public Master’s University

- 62% Underload
- 16% Standard Load
- 23% Overload

... Especially at Research Institutions?

Share of FT faculty teaching capacity utilized (Representative Department, Public Research Institution)

- 57% Utilized

The Primary Reasons for “Underloading”

- Research Releases
- Service/Admin Releases
- Insufficient Demand
- Alternative Compensation

Who’s Minding the Shop?

“There is a black market on campus for overload, supplemental pay, and reduced loads – no one has any data on this.”

Vice Provost
Public Master’s University

¹) Standard load is 24 semester credit hours

Source: EAB interviews and analysis
Aligning Faculty Effort with Institutional Goals

Supporting the University’s Most Precious Resource

Four Key Challenges to Aligning Workload Assignments with Mission

1. Improved Assessment: Giving faculty credit for all they do
2. Research Releases: Targeting releases to the most productive faculty
3. Admin/Service Releases: Reducing time on non-critical activities
4. Specialized Teaching: Ensuring quality teaching while supporting research

Multidimensional Productivity Analysis
Strategic Research Release Allocation
Specialized Admin/Service Roles
Expansion of “Clinical” Professoriate

Source: EAB interviews and analysis.
The Whole Hog

Holistic Reports a Starting Point for Workload Allocation, Assessment

Defining Key Indicators…

- Courses taught / assigned load
- Undergraduate SCH
- Master’s / PhD SCH
- Independent study SCH
- Lab SCH
- Books, book chapters, & reviews
- Journal articles
- Research expenditures
- Release time (in $)
- Creative compositions
- Exhibitions, performances, keynotes
- Conference/ poster presentations
- Editing books or book chapters
- Independent lectures

Service

- Admin. release time

… For Holistic Assessment

Annual Review of Total Productivity
Dashboards provide single version of the truth for departmental “contribution to mission” meetings with provost’s team deans, chair, and interested faculty.

Avoids Measuring “Hours” or “% Time”
Moves productivity conversation away from irrelevant factors (time inputs) to value-driven factors (outputs, outcomes).

Department-Driven
Central facilitates discussions of dashboard metrics, but departments use local knowledge to decide appropriate workload adjustments.

Adjunct funds re-allocated in A&S based on contribution-to-mission dashboards (~4% of total budget)

$1.7M

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Source: Michael McGoff, “Faculty Contributions to Mission: Sine Qua non,” Presentation to SCUP 46 (2011): EAB interviews and analysis
From Insight to Action

Dashboard Enables “Spot Checks,” Highlights Areas for Further Analysis

Departmental Use Case: Faculty Member 11

Teaching a reduced load…

Examining the Dashboard

… with marginal SCH production compared to colleagues…

… and moderate research productivity.

Considering Next Steps

Additional Departmental Analysis

- Was the research high-impact?
- Is 11 teaching particularly intensive labs?
- Is 11 being released for service to discipline (e.g., journal editing)?

Source: EAB interviews and analysis
Acknowledging the 80-20 Rule

Top Researchers Significantly More Productive Than Average

The Long Tail of Research Productivity

Share of Scholarship Produced by Share of Tenure-Track Faculty (illustrative)

“In almost all disciplines and areas of scholarly activity, the top 20% of faculty produce more than half of the scholarly output.”

Lawrence Martin
Founder, Academic Analytics

“36.7 percent of [tenure stream faculty at UT-Austin] received nothing in the way of research grants and had… an average of 34 students taught per semester.”

Richard Vedder
Distinguished Professor of Economics, Ohio University

Source: Lawrence Martin, “Using Comparative Data on Faculty Scholarly Productivity to Drive Institutional Improvement,” Academic Analytics, LLC.; Richard Vedder, “Yes, Some Teachers Do Very Little,” Minding the Campus: Reforming Our Universities, July 28, 2011; EAB interviews and analysis
Bringing Rigor to Research Releases

Two Key Questions to Increase Value of Release Time

**Traditional Allocation**

- **Departmental Benchmarks**
  - *Scattershot*: High-performers often teach same workload as colleagues
  - *Prospective*: Based on promised, not demonstrated, productivity

- **Chair Supervision**
  - *Reallocation Culturally Difficult*: Semi-permanent nature of releases makes chairs unwilling to cut them
  - *Lack of Clear Expectations*: Releases not tied to efficiency or quality standards

**“Metric-Informed” Allocation**

- **Demonstrated Productivity**
  - *Targeted*: Guides scarce release time to high-productivity researchers
  - *Reactive*: Reduces uncertainty of “betting on” increased productivity

- **Renewable Agreements**
  - *“Off-Ramps”*: Frequent renewal provides opportunity to reallocate
  - *Performance Standards*: Grantees expected to produce within a window of time or to a certain quality

Source: EAB interviews and analysis
Dragged in Too Many Directions
Dept. Chair Roles Becoming More Demanding as Opportunity Costs Rise

Chair Duties Increasingly Demand Specialized Skills…

… Even as the Costs of Releases from Academic Work Increase

Budgeting
Decentralized budget models demand greater savvy around university finance

Accountability
Chairs increasingly expected to develop strategic plans, track data more rigorously

Research
Greater competition across disciplines makes time off costly to dept. rankings

Teaching
Stagnant instructional budgets increases stakes of adjunct allocation decisions

“I actually don’t want my people to administrate – they’re too good. The most expensive thing in the world is for me to give someone a release [for administration].”

John Kraft
Dean, Warrington College of Business Administration
University of Florida

Source: Audrey Williams June, “For Chairs, the Seat’s Gotten Hotter,” Chronicle of Higher Education, December 2, 2013; EAB interviews and analysis
Worthy Investment?

Release Time More Economically Significant than Provosts Realize

Release Time More Economically Significant Than We Realize

Course Release Distribution, Public Master’s University, 2009-2013

- **3K** Total semester hours released per year
- **18%** Share of all faculty receiving release time
- **$10M** Total theoretical spending on faculty release time

Data Lead to Uncomfortable (But Healthy) Questions

- **3/4** Share of releases awarded for administration
  - Have we re-examined the release schedule recently?
  - Are we sure all our departments need their own staff?
- **1/3** Share of releases awarded to non-tenured faculty
  - Are these faculty long-term, full-timers or part-time adjuncts?
  - Is this a worthwhile trade-off to have more tenured faculty teaching or researching?

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1) Nearly all release time for non-tenured faculty is allocated for administrative work.

Source: EAB interviews and analysis
Easing the Burden
Professionalizing Time-Consuming Budgeting Frees Faculty Time

Reassign Budgeting Tasks to College Staff…

- Reduction in releases from 3 to 1 in large departments
- Assign 0.5 staff FTEs (~$25K/yr) to manage dept. budgeting
- Devolve travel budget management to individual faculty

… and Allocate Resources Accordingly…

- 480 Extra teaching capacity per year (SCH)¹
- Reclaimed time potentially reallocated to research
- Budgeting and accounting performed by trained professionals

… Increasing Faculty Time on Mission-Critical Work

1) Assumes avg. class size of 30, reclamation of 2 releases (per term), and 4 SCH per course.

Source: EAB interviews and analysis
Differentiating Instructional Roles

Multiple Tracks Can Improve Instructional Productivity and Research Intensity

**Initial “Specialized” Model (All Tenure-Track) (2000)**

- **Teaching-Track**: 4/4 load
- **Balanced Track**: 3/3 load
- **Research Track**: 2/2 load (2/1 before tenure)

**Refined Model (2010)**

- **Full-Time Non-TT Clinical Faculty**: 4/4 load
- **Asst. Professors**: 2/2 load (2/1 before tenure)

**Political Tensions**: Multiple standards for tenure create resentment, research faculty still dominant in admin

**Less Specialization, Lower Research Productivity**: Balanced track taught less than teaching track, but too much to compete for high-potential researchers

Source: EAB interviews and analysis
Finding and Reallocating Academic Resources
A Roadmap for Realizing Academic Ambitions

Course Offerings
Course Success
Curricular Focus
Faculty Workload
Strategic Investment
Reinvesting For the Future
Freeing Capacity for Growth As a Solution to Long-Term Sustainability?

Impact of Resource Allocation Endeavors Over Time

Revenue Generation

Resource Reallocation

Short-term

Long-term

Shifting capacity towards enrollment growth

Tenure-track savings and streamlining departmental structure

Adjunct savings from collapsing sections, removing some small courses