



**THE UNIVERSITY
OF ARIZONA**

Strategic Planning & Budget Advisory Committee

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THE UNIVERSITY OF ARIZONA®
STRATEGIC PLANNING & BUDGET ADVISORY COMMITTEE

ANNUAL REPORT 2018-2019

<p>Allison Vaillancourt Co-Chair, VP for Business Affairs & Human Resources</p> <p>Xubin Zeng Co-Chair, Atmospheric Sciences</p> <p>Dalila Ayoun French and Italian</p> <p>Brian Berrellez Appointed Professionals Advisory Council Representative</p> <p>Meg Lota Brown English</p> <p>Melinda Burke VP, Alumni Relations & President, UA Alumni Association</p> <p>Bryan Carter Africana Studies</p> <p>Vincent J. Del Casino Jr. Vice President for Academic Initiatives & Student Success</p> <p>Peter Dourlein Assistant VP for Planning Design & Construction</p> <p>Javier D. Duran Spanish & Portuguese</p> <p>Jim Florian Associate VP for Institutional Analysis</p> <p>Jeffrey Goldberg Interim Sr. VP for Academic Affairs & Provost</p>	<p>Sabrina Helm Family & Consumer Sciences</p> <p>Mr. Jeffrey Jones Classified Staff Council Representative</p> <p>Samuel Keim Emergency Medicine</p> <p>Irving Kron Senior Associate VP, UA Health Sciences Interim Dean, College of Medicine</p> <p>Diana Liverman Geography & Development</p> <p>Natalynn Masters ASUA President</p> <p>Marc Miller Deans' Representative, Law</p> <p>Steven Moore Senior VP and Chief Marketing/Communications Officer</p> <p>Kimberly Ogden Interim Vice President Research</p> <p>J.P. Rocznik UA Foundation President</p> <p>Lisa Rulney Senior VP for Business Affairs & CFO</p> <p>Andrew Schulz Deans' Representative, Fine Arts</p> <p>Marvin Slepian Medicine</p>	<p>Jessica Summers Chair of the Faculty, Education</p> <p>Melissa Tatum Law</p> <p>Marilyn Taylor Associate VP for Finance & Administration</p> <p>Marie Teemant GPSC President</p> <p>Rebecca Tsosie Associate VP for Equity & Multicultural Engagement, Law</p> <p>Kendal Washington White Vice Provost, Campus Life Dean of Students</p> <p>Kathy Whisman Senior Associate VP & Chief Budget Officer</p> <p>Brent White Vice Provost, Global Affairs Dean, Global Campuses</p> <p><i>Staff support provided by Jane Cherry and Sabrina Smith</i></p>
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KEY COMMITTEE ISSUES AND ACTIONS

STRATEGIC PLANNING

While SPBAC was not directly involved in the preparation of the current strategic plan, the committee received regular updates and provided input on the strategic plans and their implementation for both UA Health Sciences and the University as a whole. We began and ended the year with facilitated conversations about organizational values.

WHAT DOES HISPANIC SERVING INSTITUTION (HSI) STATUS MEAN FOR THE UA?

Marla Franco, who was this year named Assistant Vice Provost for Hispanic Serving Institution Initiatives, provided SPBAC members with an overview of the criteria that led to our recent HSI designation. She also shared efforts underway to build upon institutional commitment, faculty and staff training, diversifying faculty, student support, and partnership development.

RESPONSIBILITY-CENTERED MANAGEMENT (RCM)

SPBAC members Jeff Goldberg, Lisa Rulney, Kathy Whisman, and Jim Florian provided an overview of UA's current revenues, assessments to colleges, and RCM subvention trends. SPBAC members asked that their feedback about RCM be incorporated into the final RCM evaluation report that is being prepared by an RCM review committee. Members acknowledged that RCM increases transparency and creates performance incentives for colleges and departments but noted that it has resulted in too many open course seats, penalizes colleges with expensive programs, does not value teaching quality, and is not designed to encourage research. Members made the following recommendations:

- Improve RCM-related communication to faculty and staff directly.
- Revise the weight of general education to better distribute tuition.
- Create a better allocation formula for central functions and strategic initiatives.
- Require deans to be transparent.
- Improve the RCM governance, including implementation leadership.

FINANCE AND BUDGET

SPBAC member Lisa Rulney led a discussion on UA's finance and budget trends. The state funding to UA declined by 44% from 2008 to 2016 and is expected to remain constant through 2025. Projected financial aid for 2019 will be approximately \$300 million. Online enrollment and enrollment over micro-campuses are projected to increase significantly in the next few years, with the goal to have 10,000 students by 2025. The size of UA's endowment today is close to \$900 million. Annual research expenditures were \$686 million for 2018.

THE UA/BANNER PARTNERSHIP

Strengthening the UA/Banner partnership was a key theme of the year and SPBAC received regular updates on progress to update facilities and improve systems and patient care. UA employees and their families now have expedited appointment privileges and revenues are moving in a better direction.

ORGANIZATIONAL CULTURE

Former Vice Provost for Faculty Affairs Tom Miller led a conversation about the COACHE results and invited SPBAC members to propose options to identify and address leadership problems early, increase leader transparency and accountability, support department heads to be successful, and create a more fulfilling and rewarding environment for all faculty.

IMPROVING TEACHING QUALITY

Assistant Vice Provost for Instruction and Assessment, Lisa Elfring led a conversation about teaching quality and efforts to improve teacher-course evaluations (TCE). She shared the TCE Vision Committee's work to craft a new approach focused on the student's experience, aligned with practices central to productive teaching and learning, and useful in providing formative feedback to instructors. SPBAC endorsed the TCE Vision Committee's direction and recommended that assessment experts provide input on final recommendations.

ENROLLMENT AND RETENTION

SPBAC members Vin Del Casino, Meg Lota Brown, and Brent White provided updates and engaged in discussion on enrollment and retention trends for undergraduates, graduates, and international students.

Arizona Online enrollment has doubled since 2014. Fifty-one percent are undergraduates/first generation students, with 50% in-state residency. The goal is to have 12,000 online students enrolled by the year 2025.

First year undergraduate enrollment is up by approximately 400 students, while retention has dropped from approximately 83.1% to 81.2%. Our retention rates are uneven, with more students of color leaving us. Research regarding the factors leading students to leave us points to the need to attend to a sense of belonging. Four- and six-year graduation rates are improving.

As we consider our enrollment strategy, we must consider that there are 38 million adult learners, while the pipeline of 18-year-olds is in decline.

Graduate enrollment is up 16% since 2012 and we have seen a 54% increase in underrepresented minority enrollment during this time. The UA is #1 in the U.S. in Native American PhD students and #7 in the U.S. in Hispanic PhD students. International graduate students were up 3% in 2017 and 7% in 2018. Our Ph.D. completion rates mirror our peers: 53% after six years.

Strategies for increasing international enrollment at both the undergraduate and graduate level include market specialization, regional specialization, streamlining the application process, and increasing scholarships. Micro-campuses will be a key enrollment strategy and we have set a goal of 10,000 students on these campuses.

CAMPUS MASTER PLAN

Robert Smith, Vice President for University Planning, Design and Operations and SPBAC member Peter Dourlein discussed the process to update the Campus Master Plan. Smith and Dourlein reviewed the factors that drive campus planning and shared that expansion will occur vertically rather than horizontally as the UA is landlocked at four-hundred acres. The UA currently has 15 million square feet of buildings and there is potential to grow by an additional 10 million square feet. Parking remains a key consideration. The preliminary planning objectives of the Campus Master Plan are to address density, campus gateway, campus edges, partnerships, sustainability, infrastructure, inspiration, and academic research/planning. The UA College of Architecture, Planning, and Landscape Architecture is a key partner.

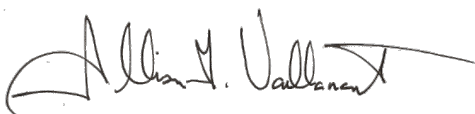
HIGHER LEARNING COMMISSION (HLC) ACCREDITATION

SPBAC member Jessica Summers led discussions on the HLC accreditation process. The team started this process in November of 2018 and the report must be completed by 2021. SPBAC provided recommendations of "evidence" for several components of the HLC self-assessment report.

SPBAC CO-CHAIRS' FINAL REMARKS

FY 18-19 was another year of profound institutional change. Good progress was made on strategic planning design and implementation and we welcomed several new deans, vice provosts, vice presidents, and senior leadership team members. We appreciate that President Robbins joined SPBAC meetings on a regular basis, as did Senior Vice Presidents Jeff Goldberg, Steve Moore, and Lisa Rulney. Their participation and insights were powerful and SPBAC members appreciated the opportunity to share their perspectives with these key decision makers.

It was an honor to serve as SPBAC co-chairs. We appreciated SPBAC members' outstanding attendance, wise analysis, and willingness to engage in spirited conversation. Once again, the committee demonstrated the power and value of shared governance to encourage thoughtful reflection and more strategic decision making.



Allison M. Vaillancourt
SPBAC Co-Chair



Xubin Zeng
SPBAC Co-chair