“If You Build It, They Will Be Funded”

Supporting the Request for a New Budget Model

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UCF – Institutional Knowledge Management

2018 Forum
Institutional Knowledge Management (IKM)

- Official state, federal reporting
- Information gathering, analysis and dissemination
- Self-service information (Pegasus Mine Information Portal)
- Custom reports, grant support
- Analytics / Dashboards
Provost Initiative:

IKM should work with Finance and Accounting to redesign the budget model and make the results transparent and easily accessible to the colleges.
Challenges
Data Needed: Old vs. New

Master Schedule

Student Records
- Major
- Online status
- Market Rate

Employee Records
- Home Department
- Fractional Load
Unexpected Data Gaps

• Approved Faculty Split Lines not available
  • needed to be provided to IKM

• Mismatch of Course and Faculty data
  • Academic Orgs vs. Department Number

• Instructors paid out of a non-Academic Unit
  • Where does their SCH go?
Multiple Meetings throughout Process

• With IKM and Finance and Accounting
• With IKM only
• With IKM and F&A Project Lead
Development

Step 1: SCH by Instructor

Step 2: Assign Instructor Department

Step 3: Prepare for Reporting
Courses with multiple Instructors require allocating SCH by the Instructor Load.
Hierarchy in assignment

- Instructors may have multiple funding sources

- SCH may get allocated based on student major (Market rate and online programs)
SCH Hierarchy for Instructor

Course SCHs are distributed among Primary Instructors (PI), Secondary Instructors (SI), & Teaching Assistants (TA), based on section effort as applicable. The college/academic administrative area is then selected using the instructors’ employment records.

- **Faculty SCHs**
  - Assigned based on employee's appointment type
  - (See below)

- **Adjunct/GTA SCHs**
  - Assigned based on employee's Home Department
  - (First 4 digits)

- **No HR Record SCHs**
  - Assigned based on Course-offering College
  - (IKM methodology)
  - (First 4 digits)

- **A&P/USPS SCHs**
  - Assigned based on employee’s appointment type
  - (See below)

Primary Joint?
- **Yes**
  - Based on joint appointment effort fractional FTE
    - (For instructors of record only, as provided by Academic Affairs)
    - (First 4 digits)

- **No**
  - Based on employee's Liability Department
    - (For all other faculty appointments, including dual comp and secondary joint)
    - (First 4 digits)

Dual Comp?
- **Yes**
  - Based on Dual Comp Home Department
    - (First 4 digits)

- **No**
  - Based on employee's Liability Department
    - (First 4 digits)
Step 2: Assign Instructor Department
SCH Hierarchy for Student Major

After the SCH are allocated to an instructor these additional groupings were identified:

• UCF Online Majors
• Market Rate/Cost Recovery Majors
• All Other Majors
Step 3: Prepare for Reporting

Student groups are assigned by Major.
Instructors are grouped by College and Unit.
Develop Flexible Solution

• Initial delivery as Pivot in Excel
  • Filterable by detail
  • Flexible to assist with report design

• Current delivery within SAS Enterprise Guide
  • Finalized data within Library
  • Created EG Project with queries and reports
  • Included additional data on change over time and dollar impact
Self-Service Delivery to Stakeholders

- SAS Visual Analytics
  - Security provided to appropriate users
  - Interactive/Drill down
  - Compare year to year changes
  - Timely Refresh
  - Instant Delivery
  - FAQ
Analytics Dashboards

IKM analytics dashboards provide interactive visual data displays in various focused areas. Access is currently limited to UCF employees with a business need. To request access to the dashboards, please contact ikmanalytics@ucf.edu.

Currently available dashboards include:

**Challenge 2020** outlines performance targets in key strategic areas that UCF has been tasked to meet by 2020. The dashboard displays performance history and the progress toward the goal for each college and UCF as a whole.

**NEW** DFW by Student Type displays DFW grade trends by Academic Year.

**High Impact Practices** contains data on a variety of areas including demographics, enrollment, graduation, and more regarding Undergraduate Research and Experiential Learning.

**NEW** SCH Budget Model displays student credit hours assigned by college or academic administrative area instructor of record.

**NEW** UCF Online Student Enrollment Dashboard includes student demographics, locations, SCH
Interactive Data Exploration

How is my College and Department performing?

### Table: SCH by Instructor of Record, Increase/Decrease for Budget Model (Excludes Auxiliary SCH)

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<td>E&amp;G Funded / Unfunded</td>
<td>Graduate SCH</td>
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#### College of Arts & Humanities
- SCH Group: College of Business Adm
- SCH Group: College of Educ & Human Perf
- SCH Group: College of Eng & Comp Sci
- SCH Group: College of Graduate Studies
- SCH Group: College of Health & Public Aff
- SCH Group: College of Medicine
- SCH Group: College of Nursing
- SCH Group: College of Optics & Photonics
- SCH Group: College of Sciences
- SCH Group: College of Undergrad Studies
- SCH Group: Other Academic Administration
- SCH Group: Rosen College Hospitality Mgmt
- SCH Group: The Burnett Honors College

### Graph: 2016-17 to 2017-18 SCH Change
Interactive Data Exploration
# Interactive Data Exploration

## What is the SCH Budget Model dashboard?
The SCH Budget Model dashboard displays student credit hours assigned by college or academic administrative area instructor of record instead of Institutional Knowledge Management’s (IKM) traditional method by course-offering college. The dashboard is designed so that users at the department or college level can track SCH productivity by career (undergraduate or graduate), SCH group (E&G funded and unfunded, E&G Online, Market rate/cost recovery, etc.), and over different periods of time (by semester or academic year).

## What is the purpose of reassigning SCH by instructor of record?
One of the principal goals of UCF’s college budget model is to allocate workload funding directly to the colleges that are bearing the E&G financial cost of instruction. This alternate distribution method is intended to capture just that, as opposed to simply the college where the course resides. For example, the traditional model assigns all English courses to the College of Arts and Humanities regardless of instructor of record. The revised method would assign an English course taught by a College of Business Administration faculty to the College of Business Administration strictly for the purpose of allocating workload funding, resources permitting.

## Are all SCHs eligible for inclusion in the college budget model?
No. Only E&G funded and unfunded courses (including UCF Online) will be funded via the model, and are reflected on the “SCH for Budget Model” tab. For general reference, the tab labeled “All SCH” can be filtered to view all SCH by group (E&G funded and unfunded, E&G Online, Auxiliary), and other filters as mentioned in question 1.

Note: UCF online SCHs for FY 17 were funded in FY 17. Beginning in FY 18 UCF online SCHs will be incorporated into the budget model and handled the same as all other E&G SCHs.

## Are all the areas/colleges shown on the dashboard eligible for workload funding via the college budget model?
No. While the dashboard displays all colleges and other areas where an instructor of record resides, not all are participating in E&G workload funding distributions via this particular model. For more information about the college budget model, please contact your respective college or VP area budget director.
Challenges Overcome

- Never Existed
- Course Departments not equal to Payroll
- Master Schedule requires timely clean-up
- Delivery in SAS Visual Analytics
- Easy Access
Resulting Benefits

• Closer working relationships with Finance & Accounting
• Understand definitions
• Automated for quick refresh
• Cleaner Master Schedule
  • Improved business process of Registrar’s Office for schedule processors
Audience Q & A
Thank you

Please remember to submit your evaluation for this session.