Providing Accountability Through Data and Process – The Program Audit

Choice/Chance: Driving Change in Higher Education
AIR Annual Forum
Kansas City, Missouri
June 5, 2007
12:30 pm – 2:10 pm

Robert Mullen, Associate Director, Institutional Research and Planning, UM–System
Cuba Plain, Assistant Vice President, Budget Planning and Development, UM-System
Tara Warne, Associate Research Analyst, UM-System
Lawrence Westermeyer, Director of Institutional Research, UM–St. Louis
Session Overview

- Introduction of Panelists
- Background and Concepts
- Panelist Perspectives
- Methodology and Example
- Uses and Limitations
- Questions and Answers
What is the Program Audit?

• A Process

• Potential Outcomes for Program or Academic Unit: modified, consolidated, suspended, or discontinued.

• Decision Maker - the Chancellor or designee
What the Program Audit Process is Not

• Not Part of the Missouri CBHE’s Five-Year Program Review
• Not Part of the University of Missouri’s Program Review Process
• Not a System Office “Hit-list”
Development Process – System Perspective

• Which Academic Units are potential candidates for an Audit?

• First Step – Collaboratively Building a Departmental Profile for each Academic Unit

• Compile Supplemental Data –

• Overall Purpose: Painting a Picture
Development Process – System Perspective

- Identified Measures of Success
- Identified Data Sources
- Assess Applicability to the Goals
- System and Campus IR Iterations
- Collaborations
- No Hidden Data or Agenda’s
Development Process – Campus Perspective

- Collaborative and Iterative
- System IR Produced Draft
- Campus IR Reviewed/Suggested Changes
- Campus Administrator Review
Development Process – Campus Perspective (cont.)

- Original Data Consisted of “Bookends”
- Provided Additional Data to Fill in the Gaps
- Additional Campus Data
The Program Audit Process

• Program Audit Procedures
• Role of Campus Standing Committees
The Program Audit Process
(cont.)

• Units Report Addressed:
  – Quality
  – Outcomes
  – Demand
  – Relation to Campus Mission
  – Comparative Advantages
  – Adequacy of Resources
The Program Audit Process
(cont.)

• Committee Makes Recommendations to Chancellor
• Chancellor Makes Final Decision
• Chancellor Reports Activities to VP for Academic Affairs
• VP for Academic Affairs Submits Report to President
Building the Profile

Cost Data

Departmental Cost Data based on School/College Cost Study (FY2004)

<table>
<thead>
<tr>
<th>Tier</th>
<th>Description</th>
<th>Cost</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Direct and Allocated Primary Program Costs less Total Income</td>
<td>$610,441</td>
</tr>
<tr>
<td>2</td>
<td>Tier 1 plus Allocated Student Aid &amp; Support Costs less Total Income</td>
<td>$1,055,600</td>
</tr>
<tr>
<td>3</td>
<td>Tier 2 plus Campus Support Costs less Total Income</td>
<td>$1,677,186</td>
</tr>
<tr>
<td>4</td>
<td>Tier 3 plus System Overhead &amp; Depreciation less Total Income</td>
<td>$1,823,093</td>
</tr>
</tbody>
</table>

School/College Full Cost of Instruction per SCH $402
Building the Profile
Delaware Data

Departmental Data Based on Delaware Costs & Productivity (FY2004):

<table>
<thead>
<tr>
<th>Description</th>
<th>FY2004</th>
<th>Total:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Direct Instructional Costs per SCH:</td>
<td>$395</td>
<td>$2,098,579</td>
</tr>
<tr>
<td>Costs Less Gross Student Fees per SCH:</td>
<td>$273</td>
<td>$664,186</td>
</tr>
<tr>
<td>Percent of Direct Instructional Costs Covered by Gross Fees:</td>
<td>68%</td>
<td></td>
</tr>
</tbody>
</table>

Compared to National Data By Discipline (FY2004)

<table>
<thead>
<tr>
<th>Discipline</th>
<th>Unit</th>
<th>National (Median)</th>
<th>Percent of National</th>
</tr>
</thead>
<tbody>
<tr>
<td>Departmental Average Cost per SCH:</td>
<td>$395</td>
<td>$239</td>
<td>165%</td>
</tr>
<tr>
<td>School/College Average Cost per SCH:</td>
<td>$165</td>
<td>237</td>
<td>47%</td>
</tr>
<tr>
<td>Fall SCH per Total Faculty FTE:</td>
<td>112</td>
<td>237</td>
<td>47%</td>
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<td>Research/Service per Ranked Regular Faculty FTE:</td>
<td>$65,330</td>
<td>$201,594</td>
<td>32%</td>
</tr>
</tbody>
</table>

Departmental Information, FY2004 Full-time Ranked Popular Faculty: 15

<table>
<thead>
<tr>
<th>Program</th>
<th>Full-time</th>
<th>Percent Targeted</th>
</tr>
</thead>
<tbody>
<tr>
<td>Department Total</td>
<td>3,087</td>
<td>2.53%</td>
</tr>
<tr>
<td>Program Service</td>
<td>1,107</td>
<td>7.34%</td>
</tr>
<tr>
<td>Research</td>
<td>166</td>
<td>15%</td>
</tr>
<tr>
<td>Program</td>
<td>15</td>
<td>15%</td>
</tr>
</tbody>
</table>

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# Building the Profile

## Standard Profile

### Departmental Information:

<table>
<thead>
<tr>
<th>FY06 Full-Time Ranked Regular Faculty</th>
<th>15</th>
</tr>
</thead>
<tbody>
<tr>
<td>Percent Tenured</td>
<td>72%</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Degree</th>
<th>FY01</th>
<th>FY02</th>
<th>FY03</th>
<th>FY04</th>
<th>FY05</th>
<th>5-YR</th>
</tr>
</thead>
<tbody>
<tr>
<td>BACH</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Percent Service</td>
<td>70%</td>
<td>72%</td>
<td>72%</td>
<td>75%</td>
<td>73%</td>
<td></td>
</tr>
<tr>
<td>Program</td>
<td>Degree</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
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<tr>
<td>---------</td>
<td>---------</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Program Name</td>
<td>BACHELOR OF ARTS</td>
<td>4</td>
<td>5</td>
<td>13</td>
<td>4</td>
<td>7</td>
</tr>
<tr>
<td></td>
<td>BACHELOR OF SCIENCE</td>
<td>11</td>
<td>10</td>
<td>10</td>
<td>5</td>
<td>5</td>
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<tr>
<td></td>
<td>MASTER OF SCIENCE</td>
<td>11</td>
<td>9</td>
<td>11</td>
<td>6</td>
<td>4</td>
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<tr>
<td></td>
<td>DOCTOR OF PHILOSOPHY</td>
<td>4</td>
<td>5</td>
<td>5</td>
<td>3</td>
<td>0</td>
</tr>
<tr>
<td></td>
<td>MINOR</td>
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<td></td>
<td></td>
<td></td>
<td></td>
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# Building the Profile: Cost Data

## Department Profile Sample

August, 2006

**Campus:** Campus Name  
**School/College:** COLLEGE OF ARTS & SCIENCES  
**Department:** Department Name

### Departmental Cost Data based on School/College Cost Study (FY2004)

<table>
<thead>
<tr>
<th>Tier</th>
<th>Description</th>
<th>Total Income (T1 Subsidy)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Tier 1</td>
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### School/College Full Cost of Instruction per SCH

$402

### Departmental Data Based on Delaware Costs & Productivity (FY2004):

- **Direct Instructional Costs per SCH:** $395  
- **Total:** $2,098,579
- **Costs Less Gross Student Fees per SCH:** $125  
- **Total:** $664,186

**Percent of Direct Instructional Costs Covered by Gross Fees:** 68%

### Compared to National Data By Discipline (FY2004)

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### Departmental Information:

- **FY2006 Full-Time Ranked Regular Faculty:** 15  
- **Percent Tenured:** 73%

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<tr>
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<td>4</td>
</tr>
<tr>
<td>MINOR</td>
<td>.</td>
</tr>
</tbody>
</table>

## Departmental Data Based on Delaware Costs & Productivity (FY2004)

<table>
<thead>
<tr>
<th>Program</th>
<th>5-YR</th>
</tr>
</thead>
<tbody>
<tr>
<td>SCH</td>
<td></td>
</tr>
<tr>
<td>FY01</td>
<td>30</td>
</tr>
<tr>
<td>FY02</td>
<td>36</td>
</tr>
<tr>
<td>FY03</td>
<td>38</td>
</tr>
<tr>
<td>FY04</td>
<td>20</td>
</tr>
<tr>
<td>FY05</td>
<td>31</td>
</tr>
<tr>
<td>5-YR</td>
<td>3%</td>
</tr>
<tr>
<td>Degrees</td>
<td></td>
</tr>
<tr>
<td>FY01</td>
<td>160</td>
</tr>
<tr>
<td>FY02</td>
<td>138</td>
</tr>
<tr>
<td>FY03</td>
<td>141</td>
</tr>
<tr>
<td>FY04</td>
<td>128</td>
</tr>
</tbody>
</table>
| FY05 | 159 (14%)
| Majors | |
| FS00 | |
| FS01 | |
| FS02 | |
| FS03 | |
| FS04 | |
| 5-YR | |

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Cost Study

• **Purpose:** Determine for each cost center
  – Historical Full Cost of the unit
  – Full cost of instruction and research/public service of the unit
  – Unit’s average cost per credit hour
  – Unit’s average cost per credit hour by student level
  – Income attributable to the unit
  – Student aid attributable to the unit
Cost Study

• **Scope**
  – Operations and Continuing Education Funds

• **Goal**
  – To appropriately match costs and revenues
  – To appropriately match credit hours produced with the costs of producing those credit hours
  – Additional Details can be found on Page 4 of the Handouts
Cost Study

• General Methodology
  – Designate specific cost centers
  – Identify consistent categories of cost
  – Use tier costing methods to further categorize and allocate costs
  – Development of unit costs
Cost Study - Allocation of Costs to Cost Centers

1. Direct expenditures of the cost center are allocated to the cost center. This includes both primary program costs and support costs paid by the cost center.
Cost Study - Allocation of Costs to Cost Centers

2. Allocate Primary Program Costs not budgeted in a cost center
   • Specifically identified with cost center
   • Remaining on-campus instruction allocated based on relative credit hours produced
   • Remaining research allocated based on relative research expenditures by cost centers
   • Community education and community service expenses (PCS 1.3 & 3.2) allocated to a community service cost center
Cost Study - Allocation of Costs to Cost Centers

3. Allocate Scholarship/Fellowship Expenses

– Student aid expenses directly identified with a cost center allocated to that cost center
– All other student aid expenses are allocated to the cost centers based on student credit hours generated, by student level and residency
Cost Study - Allocation of Costs to Cost Centers

4. Allocate System Overhead & Depreciation

- System administration and university-wide overhead expenditures and depreciation are allocated to the campus cost centers, campus overhead units, and UM Extension based on direct and allocated primary program expenditures and student aid.
5. Allocate Campus Depreciation

- Campus depreciation is allocated to the cost centers and campus overhead units based on assignable square footage of physical plant space.
6. Allocate Operation & Maintenance of Physical Plant

   Operation & maintenance of physical plant is allocated to the cost centers and campus overhead units based on assignable square footage of physical plant space.
Cost Study - Allocation of Costs to Cost Centers

7. Allocate Institutional Support, Student Services, and Academic Support

- Institutional support costs are allocated based on direct and allocated primary program expenses plus direct support expenses for academic support and student services.
Cost Study - Allocation of Costs to Cost Centers

– Student service support costs are allocated on the basis of headcount student majors.
– Academic administration costs are allocated on relative primary program expenditures.
– Library expenditures are allocated on the basis of headcount majors and teaching and research faculty.
– All other academic support expenses are allocated on the basis of headcount majors.
Cost Study

• Allocation of Full Costs Between Primary Programs
  – Full cost of instruction
  – Full cost of research and public service

See Page 5 of the Handouts for additional detail
Cost Study

• **Unit Cost Calculations**
  – Instructional cost per credit hour produced by academic cost center
  – Weighted costs developed to determine relative cost by student level
    • Weights of 1.0, 3.0, 4.5, & 7.0 were used for undergraduate, masters, professional and doctoral
Cost Study

- **Income Calculations**
  - Tuition is calculated based on the student credit hours produced by academic cost center by student level and residency
  - Instructional computing fees allocated on proportional student credit hours produced
  - All other fees and other income that is identifiable with an academic unit is allocated to the unit
  - Gross income is reduced by student aid to determine net income by academic unit
Department Profiles Tier Costs

- **Tier 1** – Direct and Allocated Primary Program Costs less Total Income Generated

- **Tier 2** – Direct and Allocated Primary Program Costs plus Allocated Student Aid, Building Maintenance, and 10% of Allocated Academic Support and Student Services less Total Income

- **Tier 3** – Full Cost of Instruction Excluding Depreciation and System Overhead less Total Income

- **Tier 4** – Full Cost of Instruction less Total Income
## Building the Profile: Delaware Data

### Department Profile Sample
August, 2006

- **Campus:** Campus Name
- **School/College:** COLLEGE OF ARTS & SCIENCES
- **Department:** Department Name

#### Departmental Cost Data based on School/College Cost Study (FY2004)

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</tr>
<tr>
<td>4</td>
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<td>$1,823,093</td>
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- **School/College Full Cost of Instruction per SCH:** $402

#### Departmental Data Based on Delaware Costs & Productivity (FY2004)

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#### Departmental Information

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- **Percent Tenured:** 73%

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<th>FY02</th>
<th>FY03</th>
<th>FY04</th>
<th>FY05</th>
<th>5-YR %</th>
<th>FY01</th>
<th>FY02</th>
<th>FY03</th>
<th>FY04</th>
<th>FY05</th>
<th>5-YR %</th>
<th>FS02</th>
<th>FS01</th>
<th>FS00</th>
<th>FS03</th>
<th>FS04</th>
<th>5-YR %</th>
</tr>
</thead>
<tbody>
<tr>
<td>Department Total</td>
<td>5,107</td>
<td>5,109</td>
<td>5,495</td>
<td>5,607</td>
<td>5,792</td>
<td>13%</td>
<td>30</td>
<td>36</td>
<td>39</td>
<td>30</td>
<td>31</td>
<td>35%</td>
<td>160</td>
<td>158</td>
<td>141</td>
<td>128</td>
<td>159</td>
<td>1%</td>
</tr>
<tr>
<td>Percent Service</td>
<td>70%</td>
<td>71%</td>
<td>72%</td>
<td>75%</td>
<td>73%</td>
<td></td>
<td></td>
<td></td>
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</tr>
<tr>
<td>Program Degree</td>
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<td></td>
</tr>
</tbody>
</table>

- BACHELOR OF ARTS
- BACHELOR OF SCIENCE
- MASTER OF SCIENCE
- DOCTOR OF PHILOSOPHY
- MINOR

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Delaware Study
National Study of Instructional Costs and Productivity

- The Delaware Study Responds to Public Perceptions about Faculty Productivity
- Establishes Productivity and Cost Benchmarks
- Costs driven by disciplinary mix
Delaware Study
National Study of Instructional Costs and Productivity

• Data Collected by CIP-4
• Participation is Voluntary: nearly 200 Institutions with Varying Missions in 2005
  – UM compares only to other research institutions (68)
• Only Includes Direct Instructional Costs
Delaware Study
National Study of Instructional Costs and Productivity

Caveats

• Time lag
• Must be able to Link Students to Faculty to Dollars
• Lose Interdepartmental Productivity and Instructional Costs Attributed to Administrative Units
Instructional Productivity Defined

- Measures of SCH and Sections
- FTE Faculty by Type
- FTE Students, Majors, and Degrees
- Each have National Norms as Benchmarks
Costs Defined

• Include only Direct Instructional Costs—a Subset of Tier 1 Costs from the Cost Study
• Expenditures per SCH and per FTE Student
• Expenditures for Instruction, Research, and Service
Delaware and the Department Profiles

• Department Profiles Combine Data from Three Areas:
  – School and College Cost Study
  – Delaware Costs and Productivity
  – Departmental Information
Department Profile Sample
August, 2006

Campus: Campus Name
School/College: COLLEGE OF ARTS & SCIENCES
Department: Department Name

Departmental Cost Data Based on School/College Cost Study (FY2004):

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<th>FY02</th>
<th>FY03</th>
<th>FY04</th>
<th>FY05</th>
<th>5-YR</th>
</tr>
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<tbody>
<tr>
<td>Total</td>
<td>30</td>
<td>36</td>
<td>39</td>
<td>20</td>
<td>31</td>
<td>3%</td>
</tr>
<tr>
<td>Program</td>
<td>160</td>
<td>138</td>
<td>141</td>
<td>128</td>
<td>159</td>
<td>( 1%)</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Program Name</th>
<th>Degree</th>
</tr>
</thead>
<tbody>
<tr>
<td>BACHELOR OF ARTS</td>
<td>4 (45%)</td>
</tr>
<tr>
<td>BACHELOR OF SCIENCE</td>
<td>11 (45%)</td>
</tr>
<tr>
<td>MASTER OF SCIENCE</td>
<td>11 (27%)</td>
</tr>
<tr>
<td>DOCTOR OF PHILOSOPHY</td>
<td>4 (0%)</td>
</tr>
<tr>
<td>MINOR</td>
<td>.</td>
</tr>
</tbody>
</table>

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Building the Profile: Putting it Together

• Majors and Degree Data Pulled from Census Files

• Percent of SCH as Service Hours

• SCH Differs from NSICP: who owns not who teaches a given course
Uses and Limitations – System Perspective

• Department versus Program
• The Chainsaw versus the Scalpel
• Interdisciplinary/Interdepartmental Work
• Statewide Programs
• Timely Data? Using FY2004 Data
• Data Acceptance – Painting the Picture
T1 Subsidy per SCH

FOR LANG & LIT  |  MATH & COMP SCI  |  ENGLISH  |  ECONOMICS  |  COMMUNICATION  |  HISTORY  |  MUSIC  |  BIOLOGY  |  PHYSICS & ASTRONOMY  |  CHEMISTRY  | Nursing
-150  |  -100  |  -50  |  0  |  50  |  100  |  150  |  200  |  100  |  150  |  200

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T1 Subsidy
T1 Percent Recouped

- MUSIC
- Nursing
- PHYSICS & ASTRONOMY
- CHEMISTRY
- WORK
- SOCIAL WORK
- ECONOMICS
- ENGLISH
- MATH & COMP SCI
- FOR LANG & LIT
- SOCIOLOGY
Relative Productivity Graph
Uses and Limitations – Campus Perspective

• VPAA and Provost Review Goals and Data
• Provost Identifies Units
• Committee of Faculty Conducts Audits
• Stressful and Emotional Learning Process
Audit Activities

- FY2004 – Five Programs, One Department
- FY2005 – Colleges of Education
- FY2006 – None Conducted
FY2004 Recommendations and Results

• Four Programs Continued
  – Restore Faculty, Enhance External Funding
  – Broaden Program
  – Rename Two Programs to Broaden Appeal, Secure Additional External Funding

• One Program Placed on Probation

• Department to Explore Cooperative Program Locally
Questions and Further Discussions

Additional Information:

Delaware Study - http://www.udel.edu/IR/cost/
Cost Study - http://www.umsystem.edu/ums/departments/fa/budget/
UMSL IR Office - http://www.umsl.edu/%7Eir/
UMSa IR Office - http://www.umsystem.edu/ums/departments/fa/planning/
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Thank You for Your Time