

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



- 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



\$610,441

\$1,055,060

\$1,677,186

\$1,823,093

\$402

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

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

Tier 1 - Direct and Allocated Primary Program Costs less Total Income (Tl Subsidy)

Tier 2 - Tier 1 plus Allocated Student Aid & Support Costs less Total Income (T2 Subsidy)

Tier 3 - Tier 2 plus Campus Support Costs less Total Income (T3 Subsidy)

Tier 4 - Tier 3 plus System Overhead & Depreciation less Total Income (T4 Subsidy)

School/College Full Cost of Instruction per SCH

Direct Instructional Costs	per SCH:	\$395	Total:	\$2,098,579
Costs Less Gross Student Fees		\$125	Total:	\$664,186
Percent of Direct Instructional Costs Covered by Gro	ss Fees:	58%		
Compared to National Data By Discipline (FY2004)				
	Unit	National (M	edian)	Percent of Nationa
Departmental Average Cost per SCH:	\$395	\$239		165%
School/College Average Cost per SCH:	\$185			
Fall SCH per Total Faculty FTE:	112	237		47*
Research/Service per Ranked Regular Faculty FTE:	\$65,330	\$201,594		32*
•				

d Regula	-																
			15														
Percent	t Termi	rea:	73%														
			SCH					De	grees					P.	Tajors		
FY01	FY02	LA03	FY04	FY05	5-YR	FY01	FY02	LA03	FY04	FY05	5-YR	F300	F301	F302	F303	F304	5-37
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		BACI	HELOR O	F SCIENC	E	11	10	10	5	5	(45%)	69	60	60	53	85	23:
		MAST	TER OF	SC IENCE		11	9	11	6	14	27*	2.5	18	18	23	18	(31:
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Building the Profile Delaware Data



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

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

Tier 1 - Direct and Allocated Primary Program Costs less Total Income (T1 Subsidy)
Tier 2 - Tier 1 plus Allocated Student Aid & Support Costs less Total Income (T2 Subsidy) Tier 3 - Tier 2 plus Campus Support Costs less Total Income (T3 Subsidy)
Tier 4 - Tier 3 plus System Overhead & Depreciation less Total Income (T4 Subsidy) School/College Full Cost of Instruction per SCH

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

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

\$1,055,060

\$1,823,093

Percent of Direct Instructional Costs Covered by Gross Fees: 58€

Compared to National Data By Discipline (FY2004)

National (Median) Percent of National \$395 Departmental Average Cost per 3CH: School/College Average Cost per SCH: \$185 Fall SCH per Total Faculty FTE: 47% Research/Service per Ranked Regular Faculty FTE: \$65,330 \$201,594 32%

Departmental Information

FY2006 Full-Time Ranked Regular Faculty:

	Perce	nt Term	red:	73%														
				SCH					De	grees						Majors		
	FY01	FY02	LA03	FY04	FY05	5-YER	FY01	FY02	LA03	FY04	FY0.5	5-YR	F300	F301	F302	F303	F304	5-YF
Department Total Percent Service	5,107 70*	5,109 71*		5,607 75%	5,792 73%	13%	30	36	39	20	31	3*	160	138	141	128	159	(14
Program			Deg	ree		200												
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			BAC	HELOR O	F SCIENC	E	11	10	10	5	5	(45%)	69	60	60	53	8.5	23%
			MAS	TER OF	SC IENCE		11	9	11	6	14	27*	2.5	18	18	23	18	(31%
			DOC	TOR OF	PHILOSOF	HY	4	8	5	5	4	0.8	38	29	18	28	31	(18%
			MIN	OP.			- 20	200	200		121		-	5	-	700		



Building the Profile Standard Profile



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

Departmental Cost Data based on School/College Cost Study (BY2004)

Tier 1 - Discot and Allocated Primary Program Costs less Total Income (T1 Subsidy)

Tier 2 - Tier 1 plus Allocated Student Aid & Support Costs less Total Income (T2 Subsidy)

Tier 3 - Tier 2 plus Campus Support Costs less Total Income (T3 Subsidy)

Tier 4 - Tier 2 plus System Overhead & Depreciation less Total Income (T4 Subsidy)

School/College Pull Cost of Instruction per SCH Departmental Data Based on Delaware Costs & Productivity (RY2004); Direct Instructional Costs per SCH: Costs Less Gooss Student Pees per SCH: Percent of Direct Instructional Costs Covered by Gooss Fees: Compared to National Data By Discipline (FY2004) National (Median) Percent of National \$239 165* Departmental Average Cost per SCH: School/College Average Cost per SCH: Fall SCH per Total Faculty FTE: Research/Service per Ranked Regular Faculty FTE: 237 \$201,594

\$65,330

Departmental Information:

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

				3CH					De	grees					1	Majors			
	FY01	FY02	IY03	FY04	FY05	5-YR	FY01	FY02	LA03	FY04	FY05	5-YR	F300	F301	F302	F303	F304	5-7	ZR.
Department Total Percent Service	70%	71%	5,495 72*		5,792 73*	13*	30	36	39	20	31	3*	160	138	141	128	159	()	1*)
Program			Deg	zee	4 Met/coc	_10													
Program Name			BAC	HELOR O	r ARTS	36	4	g	13	4	7	75%	27	25	31	24	25	('	7*)
			BAC	HELOR O	F SCIENC	E	11	10	10	5	Б	(45%)	69	60	60	53	85	20	3.
			MAS	TER OF	3C IENCE		11	9	11	б	14	27%	25	18	18	23	18	(33	1*)
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			MIN	OR.			3		3			1		5	1999	1839	10.5	100000	93000



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)

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Tier 1 - Direct and Allocated Primary Program Costs less Total Income (Tl Subsidy)	\$610,441
Tier 2 - Tier 1 plus Allocated Student Aid & Support Costs less Total Income (T2 Subsidy)	\$1,055,060
Tier 3 - Tier 2 plus Campus Support Costs less Total Income (T3 Subsidy)	\$1,677,186
Tier 4 - Tier 3 plus System Overhead & Depreciation less Total Income (T4 Subsidy)	\$1,823,093
School/College Full Cost of Instruction per SCH	\$402

Departmental Data Based or							er in mercent and an in-							
	Direct Instructional Co		\$395		Total:		98,579							
	Costs Less Gross Student H		\$125		Total:	\$66	54,186							
Percent of Direct Ins	structional Costs Covered by	Gross Fees:	68	È										
Compared to National	Data By Discipline (FY2004)													
_		Unit	Nation	al (Medi	an)	Percent	of Nat	ional						
Departs	mental Average Cost per SCH	\$395		\$239			165%							
School/Co	llege Average Cost per SCH:	\$185												
Fall.	SCH per Total Faculty FTE:	112		237			47%							
	Ranked Regular Faculty FTE:		\$201	,594			32%							
Departmental Information:														
FY2006 Full-Time Rank	ted Regular Faculty: 15													
	Percent Tenured: 739	r												
	SCH				Do									
	FY01 FY02 FY03 FY0	4 FY05 5-YR	FY01	FY02	FY03	grees FY04	FY05	5-YR	FS00	FS01	FS02	Majors FS03	FS04	5-YR
Department Total	FY01 FY02 FY03 FY05	7 5,792 13%	FY01 30	FY02 36			FY05	5-YR 	FS00 ———————————————————————————————————	FS01			FS04	5-YR ————————————————————————————————————
Department Total Percent Service	FY01 FY02 FY03 FY05		-		FY03	FY04			-		FS02	FS03		
	FY01 FY02 FY03 FY05	7 5,792 13%	-		FY03	FY04			-		FS02	FS03		
Percent Service	FY01 FY02 FY03 FY03 5,107 5,109 5,495 5,60 70% 71% 72%	7 5,792 13%	-		FY03	FY04			-		FS02	FS03		
Percent Service	FY01 FY02 FY03 FY0 5,107 5,109 5,495 5,60 70% 71% 72% Degree	7 5,792 13%	30		39 13	FY04		3% 75%	-		FS02	FS03		(1%)
Percent Service Program	FY01 FY02 FY03 FY0 5,107 5,109 5,495 5,60 70% 71% 72% Degree BACHELOF	17 5,792 13% 15% 73%	30	36	39	FY04 20		3%	160	138	FS02	FS03	159	(1%)
Percent Service Program	FY01 FY02 FY03 FY0 5,107 5,109 5,495 5,60 70% 71% 72% 7 Degree BACHELOI BACHELOI	17 5,792 13% 15% 73%	30	36	39 13	FY04 20	31	3% 75%	160	138 26	141 31	FS03	159 25	(1%)
Percent Service Program	FY01 FY02 FY03 FY0 5,107 5,109 5,495 5,60 70% 71% 72% Degree BACHELON BACHELON MASTER (17 5,792 13% 15% 73% 2 OF ARTS 2 OF SCIENCE	30 4 11	36 9 10	39 13 10	FY04 20 4 5	31 7 6	75% (45%)	160 27 69	138 26 60	141 31 60	FS03 128 24 53	159 25 85	(1%) (7%) 23%





- 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





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





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





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.





- 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





- 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





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.





- 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.





- 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.





- 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





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





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

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

Department: Department Name

Departmental Cost Data based on School/College Cost Study (FY2004)	
Tier 1 - Direct and Allocated Primary Program Costs less Total Income (T1 Subsidy)	\$610,441
Tier 2 - Tier 1 plus Allocated Student Aid & Support Costs less Total Income (T2 Subsidy)	\$1,055,060
Tier 3 - Tier 2 plus Campus Support Costs less Total Income (T3 Subsidy)	\$1,677,186
Tier 4 - Tier 3 plus System Overhead & Depreciation less Total Income (T4 Subsidy)	<u>\$1,823,093</u>
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Direct Instructional Costs per SCH: \$395 \$2,098,579 \$125 Costs Less Gross Student Fees per SCH: \$664,186 Percent of Direct Instructional Costs Covered by Gross Fees: Compared to National Data By Discipline (FY2004) National (Median) Percent of National \$239 \$395 165% Departmental Average Cost per SCH: School/College Average Cost per SCH: \$185 Fall SCH per Total Faculty FTE: 112 237 47% Research/Service per Ranked Regular Faculty FTE: \$201,594 \$65,330

tmental Information: FY2006 Full-Time Ranke		ar Facu		15 73%														
	reicei	ic reiid.	.eu,	75%														
				SCH					Deg	grees						Majors		
	FY01	FY02	FY03	FY04	FY05	5-YR	FY01	FY02	FY03	FY04	FY05	5-YR	FS00	FS01	FS02	FS03	FS04	5-YR
Department Total Percent Service	5,107 70%		5,495 72%	5,607 75%		13%	30	36	39	20	31	3%	160	138	141	128	159	(1%)
Program			Deg	ree														
Program Name			BAC	HELOR O	F ARTS		4	9	13	4	7	75%	27	26	31	24	25	(7%)
-			BAC	HELOR OF	F SCIEN	DE:	11	10	10	5	6	(45%)	69	60	60	53	85	23%
				TER OF			11	9	11	6	14	27%	26	18	18	23	18	(31%)
			DOC"	FOR OF	PHILOSO	PHY	4	8	5	5	4	0%	38	29	32	28	31	(18%)
			MIN											5				



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



Building the Profile: Putting it Together



Department Profile Sample

August, 2006

Campus: Campus Name

School/College: COLLEGE OF ARTS & SCIENCES

Department: Department Name

Tier 2 - Tier 1 plus		y Program Cost					(z.)		055,060						
Tier 3 - Tier 2 plus					Oute (12	Jupard)	y /		677,186						
Tier 4 - Tier 3 plus					Subsidy	7)			823,093						
		Sch	ool/College Fi	ıll Cost o	f Instru	action p	per SCH		\$402						
artmental Data Based o	n Delaware Costs	& Productivit	y (FY2004):												
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	Costs Less Gros			\$125		Total:	\$6	64,186							
Percent of Direct In	structional Costs	s Covered by C	ross Fees:	68	ક										
Compared to National	Data By Discipli	ine (FY2004)													
1 2	1		Unit	Nation	al (Med:	lan) I	Percent	of Nat	ional						
	mental Average Co		\$39		\$239			165%							
	oll ege Ave rage Co		\$185						(Billion on the						
	l SCH per Total F		11:		237			47%		illiano.					
Research/Service per	Ranked Regular E	Faculty FTE:	\$65,330	\$201	,594			32%							
FY2006 Full-Time Rank	Percent Tenur	red: 73% SCH					grees						Majors		
	Percent Tenur	red: 73%	FY05 5-YR	FY01	FY02	232232232232321223223	grees FY04	FY05	5-YR	FS00	FS01	FS02	Majors FS03	FS04	5-Y
Department Total Percent Service	Percent Tenur	SCH FY03 FY04 5,495 5,607	5,792 13%	FY01 30	FY02		CONTRACTOR OF CONTRACTOR	FY05	5-YR 	FS00 ———————————————————————————————————	FS01			FS04	5-Y
Department Total	FY01 FY02 5,107 5,109	SCH FY03 FY04 5,495 5,607	5,792 13%			FY03	FY04					FS02	FS03		
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Department Total Percent Service Program	FY01 FY02 5,107 5,109	red: 73% SCH FY03 FY04 5,495 5,607 72% 75% Degree	5,792 13% 73%	30	36	FY03	FY04		3% 75%	160	138	FS02	FS03	159 25 85	(1 (7 23
Department Total Percent Service Program	FY01 FY02 5,107 5,109	red: 73% SCH FY03 FY04 5,495 5,607 72% 75% Degree BACHELOR C BACHELOR C MASTER OF	5,792 13% 73% F ARTS F SCIENCE SCIENCE	30 4 11 11	36 9 10 9	39 13 10 11	FY04 20 4 5	31 7 6 14	3% 75% (45%) 27%	160 27 69 26	138 26 60 18	FS02 141 31 60 18	128 24 53 23	159 25 85 18	(1 (7 23 (31
Department Total Percent Service Program	FY01 FY02 5,107 5,109	SCH FY03 FY04 5,495 5,607 72% 75% Degree BACHELOR C BACHELOR C MASTER OF DOCTOR OF	5,792 13% 73% 73% F ARTS F SCIENCE	30 4 11	36 9 10	39 13 10	FY04 20 4 5	31 7 6	3% 75% (45%)	160 27 69	138 26 60 18 29	FS02 141 31 60	128 24 53	159 25 85	(1 (7 23 (31
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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



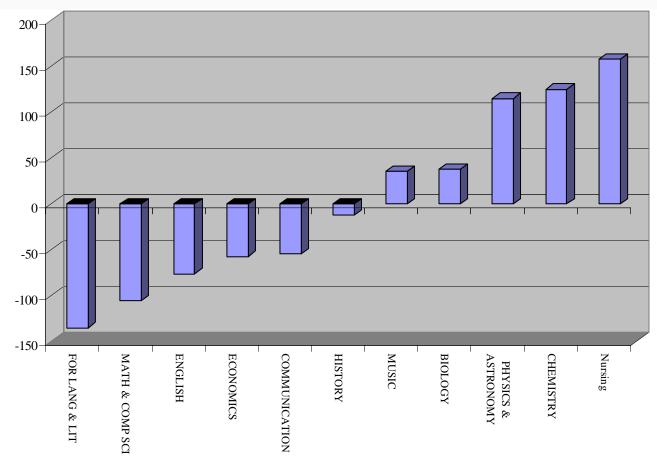
- Department versus Program
- The Chainsaw versus the Scalpel
- Interdisciplinary/Interdepartmental Work
- Statewide Programs
- Timely Data? Using FY2004 Data
- Data Acceptance Painting the Picture





T1 Subsidy per SCH

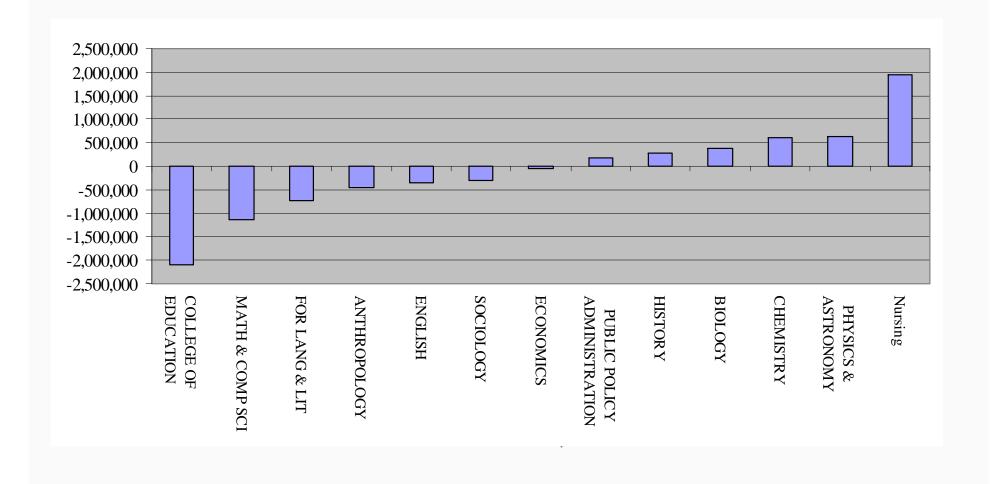






T1 Subsidy

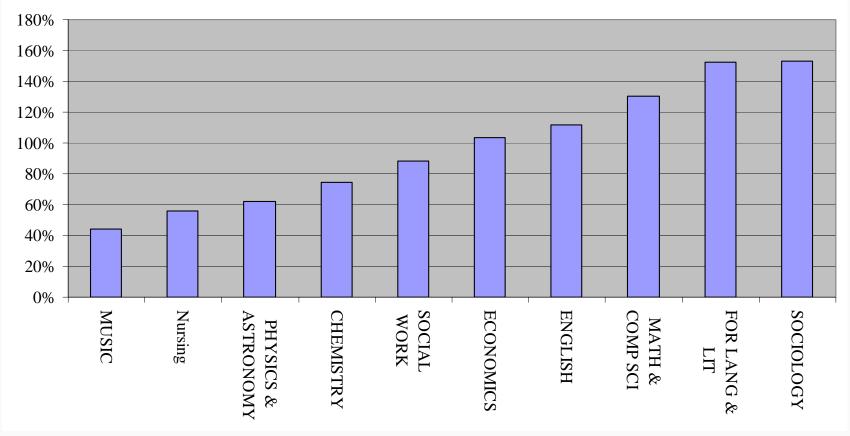






T1 Percent Recouped







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/

Program Audits -

http://www.umsystem.edu/ums/departments/gc/rules/administration/20/035.shtml

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