

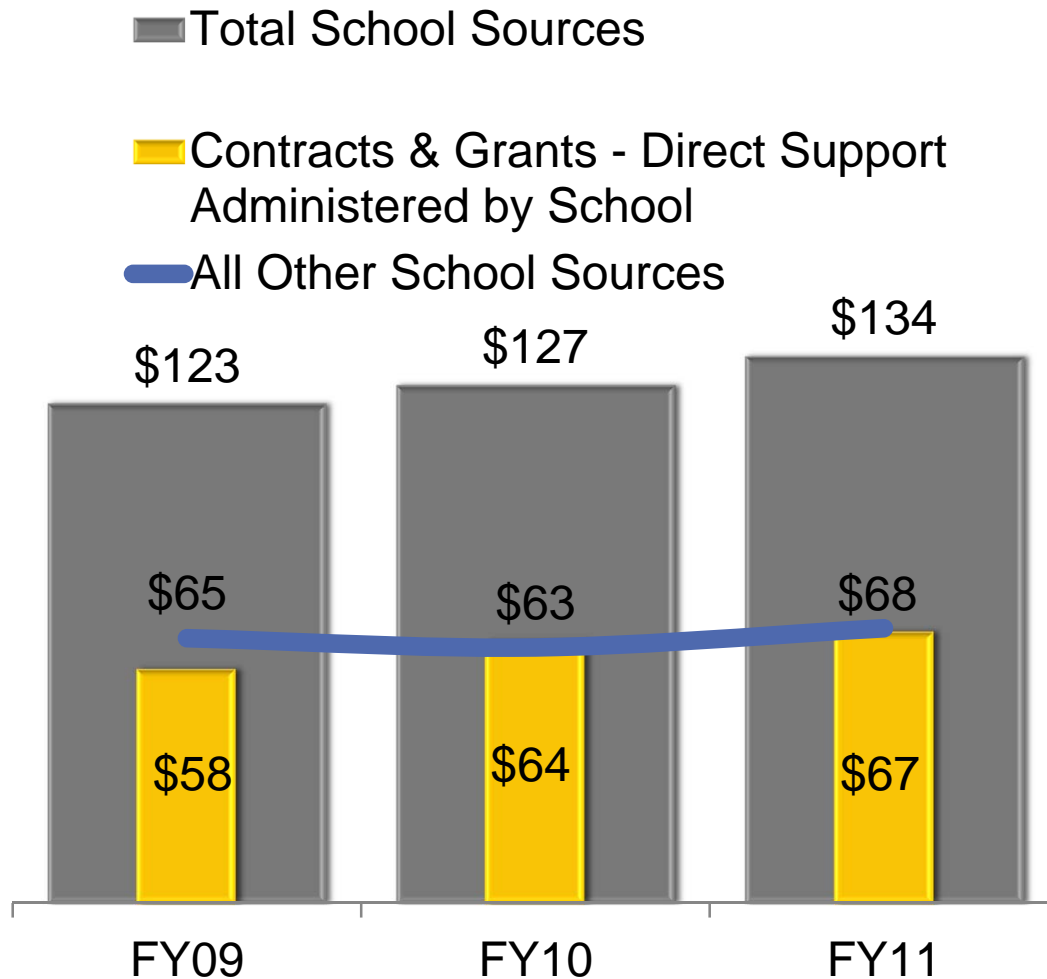
# FACULTY-STAFF MEETING BUSINESS UPDATE FALL 2011

## ■ SPH Finances

- 2011 Summary
- Financial Trends

## ■ Allocation Model

# 3 YEAR FINANCIAL TREND



**Total funding sources trending UP.**

**Majority of growth in contracts & grants administered by the School.**

**Other sources remained flat or decreased, including state allocations.**

**Exception was FY11 overhead allocation-- increased significantly due to building debt payoff.**

# 3 YEARS OF STATE BUDGET CUTS

**21% LOSS  
OF FY08 STATE OPERATING BASE**

- ✘ 7% of faculty positions
- ✘ 27% of teaching assistantships
- ✘ 36% central support staff



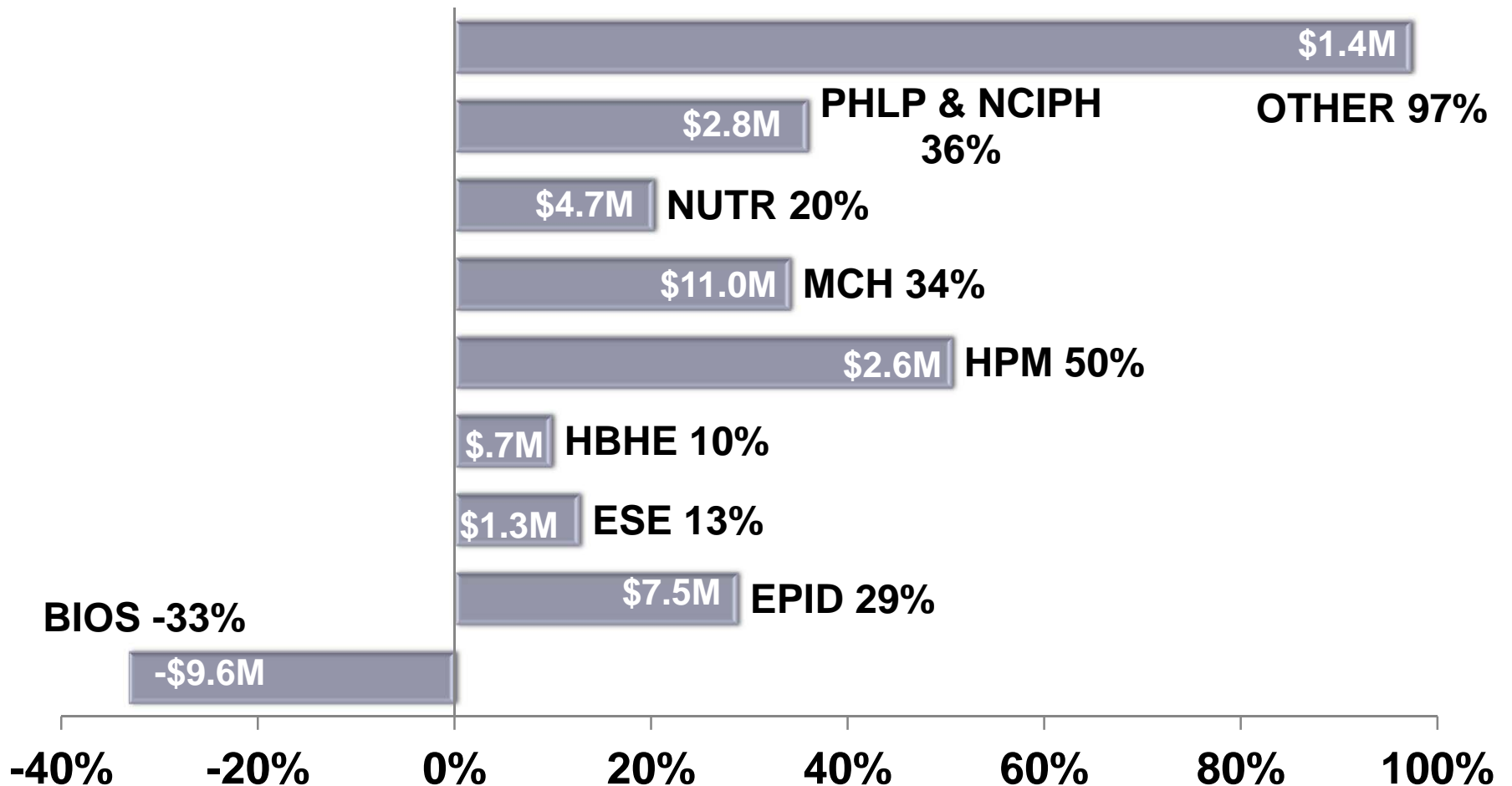
# SPH FINANCIAL SUMMARY

<b><u>Sources</u></b>	<i>In Millions</i>	
	<b><u>FY10</u></b>	<b><u>FY11</u></b>
State Appropriation	\$ 27.3	\$ 25.6
Receipts	\$ 1.8	\$ 1.8
Indirect Cost Recovery- Allocated to the School	\$ 11.1	\$ 17.1
Contracts & Grants- Direct Support Administered by School	\$ 64.4	\$ 66.9
Trusts - Restricted	\$ 14.2	\$ 13.9
Trusts - Unrestricted	\$ 5.2	\$ 5.7
Services & Other	\$ 3.2	\$ 3.6
<b>Total</b>	<b>\$ 127.3</b>	<b>\$134.5</b>
<b><u>Uses</u></b>		
Compensation	\$ 66.5	\$ 67.7
Consulting & Contractual Services	\$ 1.8	\$ 1.3
Student Aid and Grants	\$ 5.2	\$ 6.0
Other Grants	\$ 18.4	\$ 17.6
Operations	\$ 14.8	\$ 22.4
Capital	\$ 1.0	\$ 1.1
Restricted Trusts Carry-forward	\$ 8.4	\$ 9.5
Reserves -Restricted & Unrestricted for Future Commitments	\$ 11.2	\$ 9.0
(within Departments and Central Units)		
<b>Total</b>	<b>\$ 127.3</b>	<b>\$134.5</b>

Public Health Foundation assets are only included if transferred to the University for use. \$306,705 of operational expenditures paid directly from the Public Health Foundation are not included.

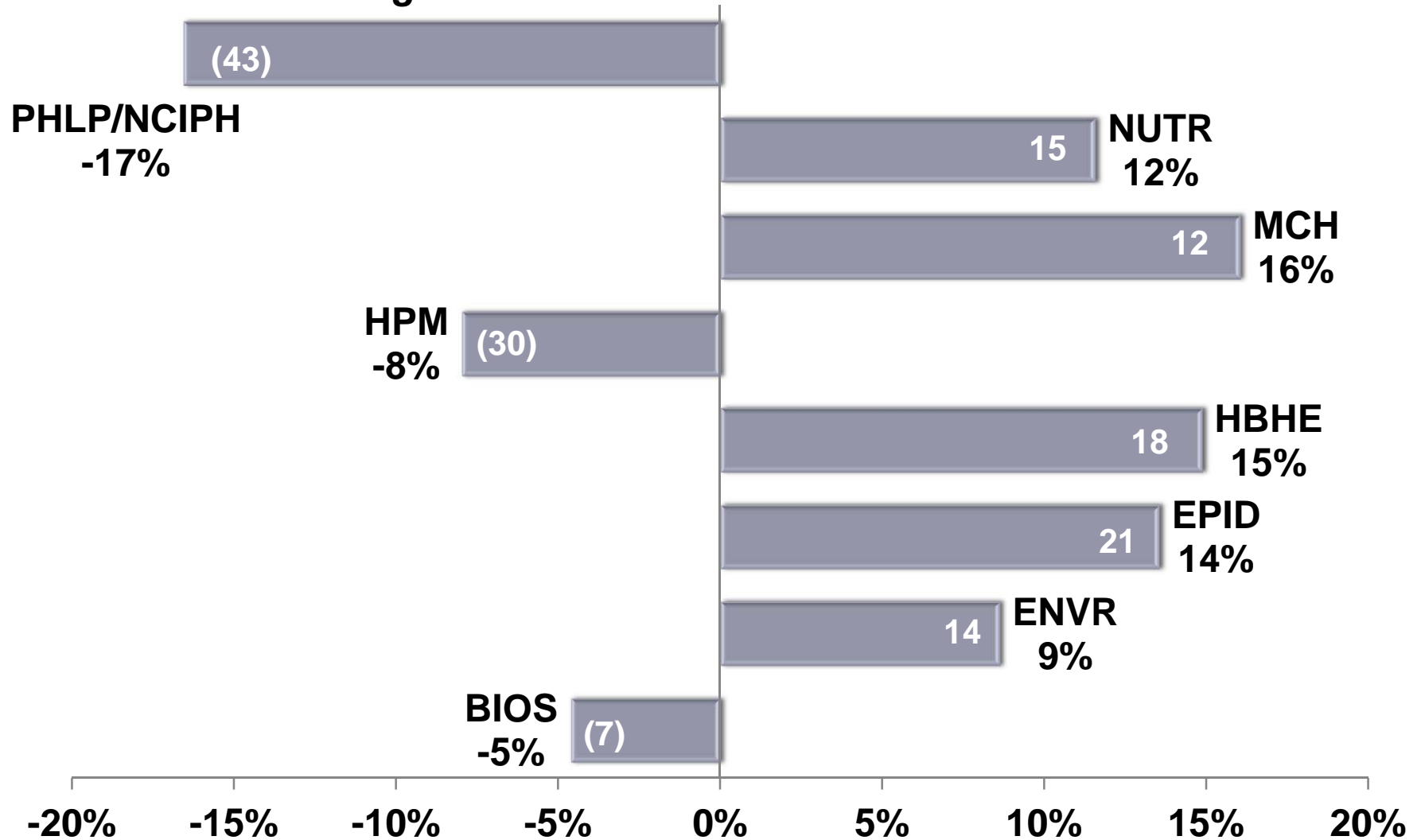
# RESEARCH AWARDS CHANGE

## Awards Change from FY2010



# ENROLLMENT CHANGE

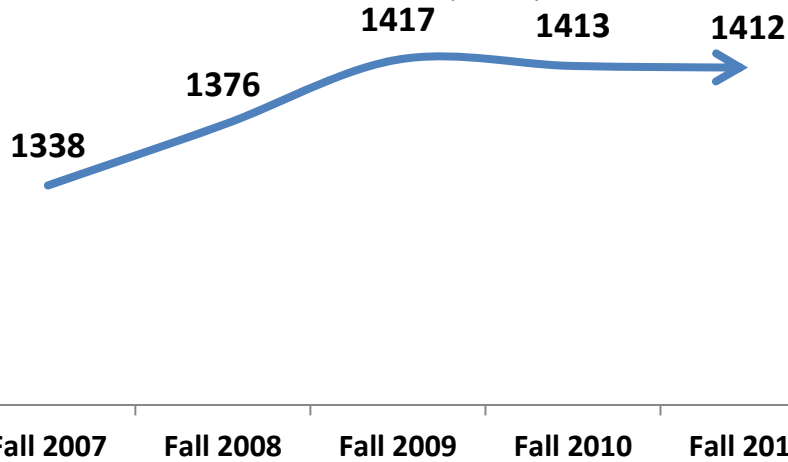
## Enrollment FTE Change from FY2010



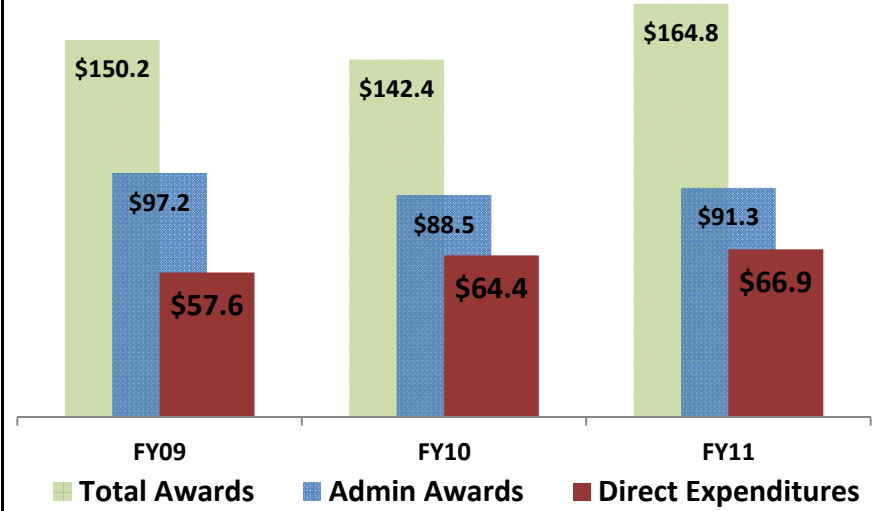
# KEY SPH FINANCIAL INDICATORS



*Student Enrollment (FTE)*



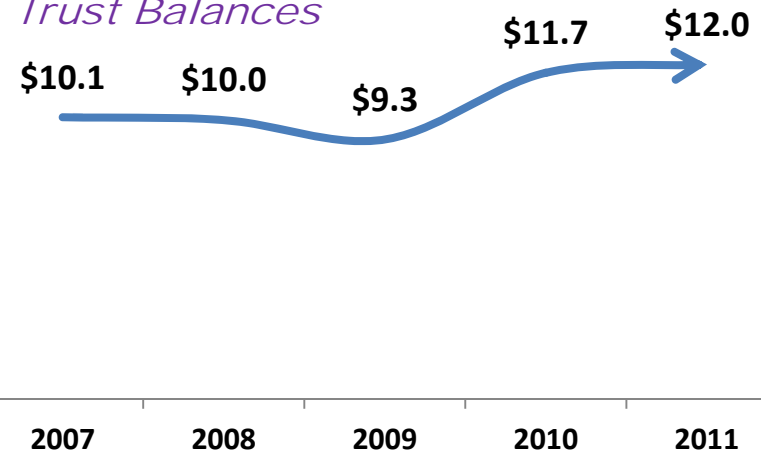
*Research Awards & Directs*



*Market Value*



*Trust Balances*





***State Budget  
Allocation Model***



# BACKGROUND

- ✿ **State budget allocation within SPH had not been changed significantly for 10 years.**
- ✿ **Half of our academic units have disparities between their percentage of state budget and their student enrollment.**
- ✿ **Until FY07, Distance Education (DE) program receipts created a revenue buffer for departments with most enrollment (HPM, PHLP).**
- ✿ **ESE conversion to 9-month faculty in FY03 committed an additional \$1.05 million of permanent budget directly to the department.**

# STATE BUDGET ALLOCATION TO SPH

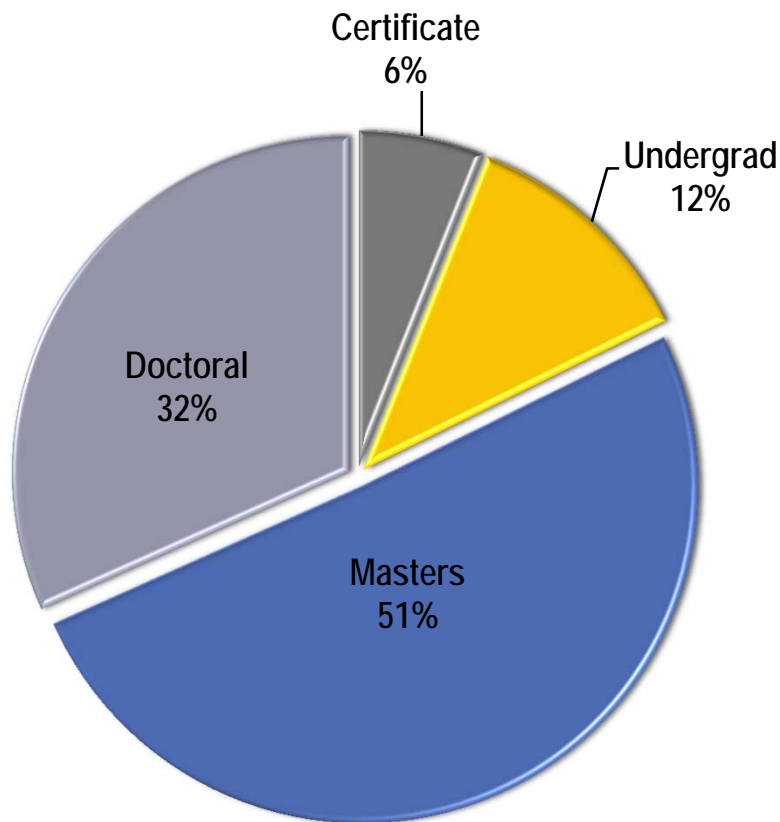
**The Provost's Office does not use a formulaic approach to allocate state support to SPH.**

**Important considerations for the allocation are:**

- **School's enrollment changes over the past 2 years**
  - ☀ **FTE as the basis for evaluating enrollment changes**
  - ☀ **Graduate versus undergraduates**
  - ☀ **NC residents versus non-residents**
  - ☀ **Teaching effort as measured by taught student credit hours**
  
- **SPH's % enrollment change compared to other schools**
- **SPH's resource base compared to other schools**
- **SPH's alignment with University's mission**

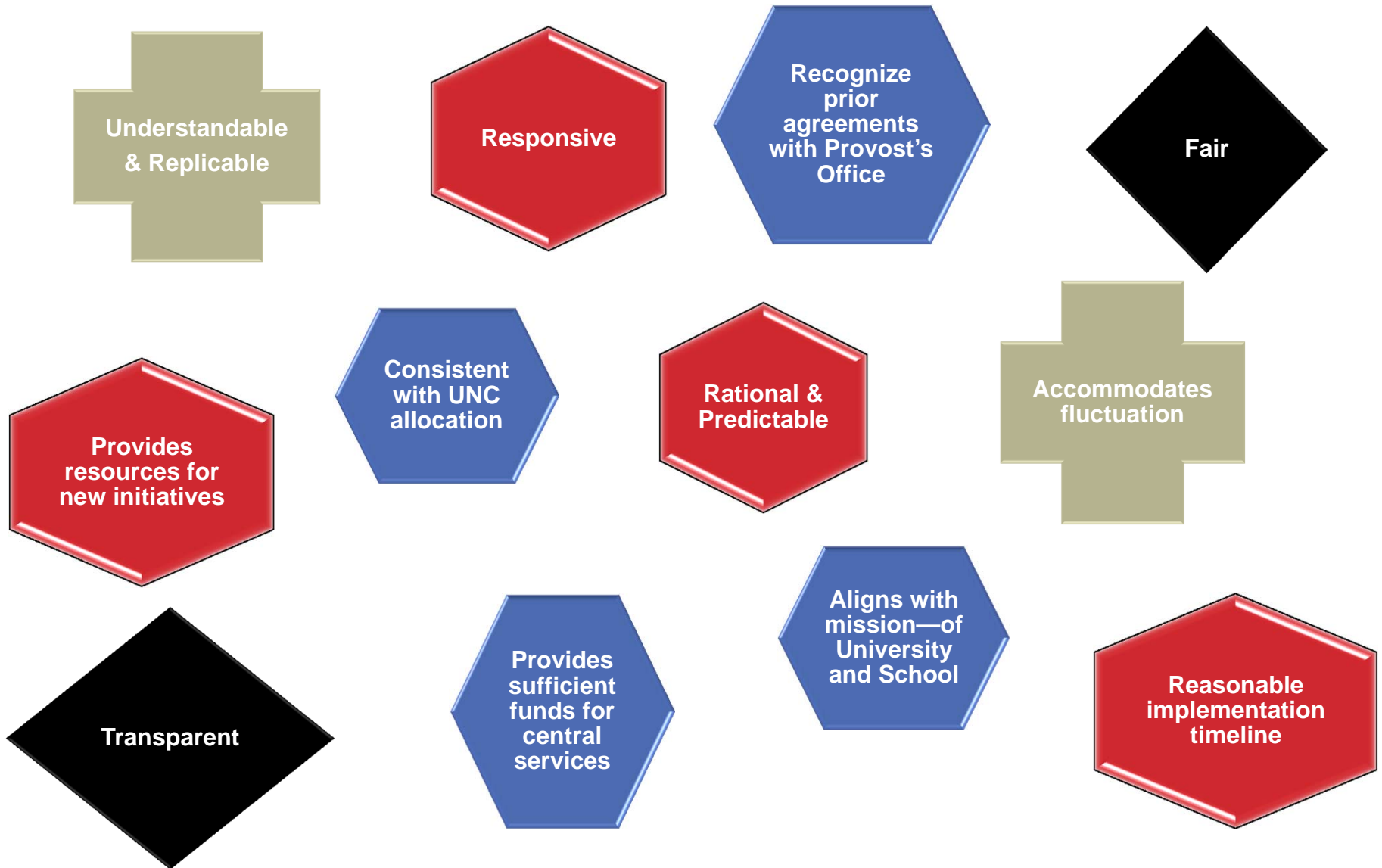
# VERY DIFFERENT DEPARTMENTS/UNITS

## School's Combined Enrollment

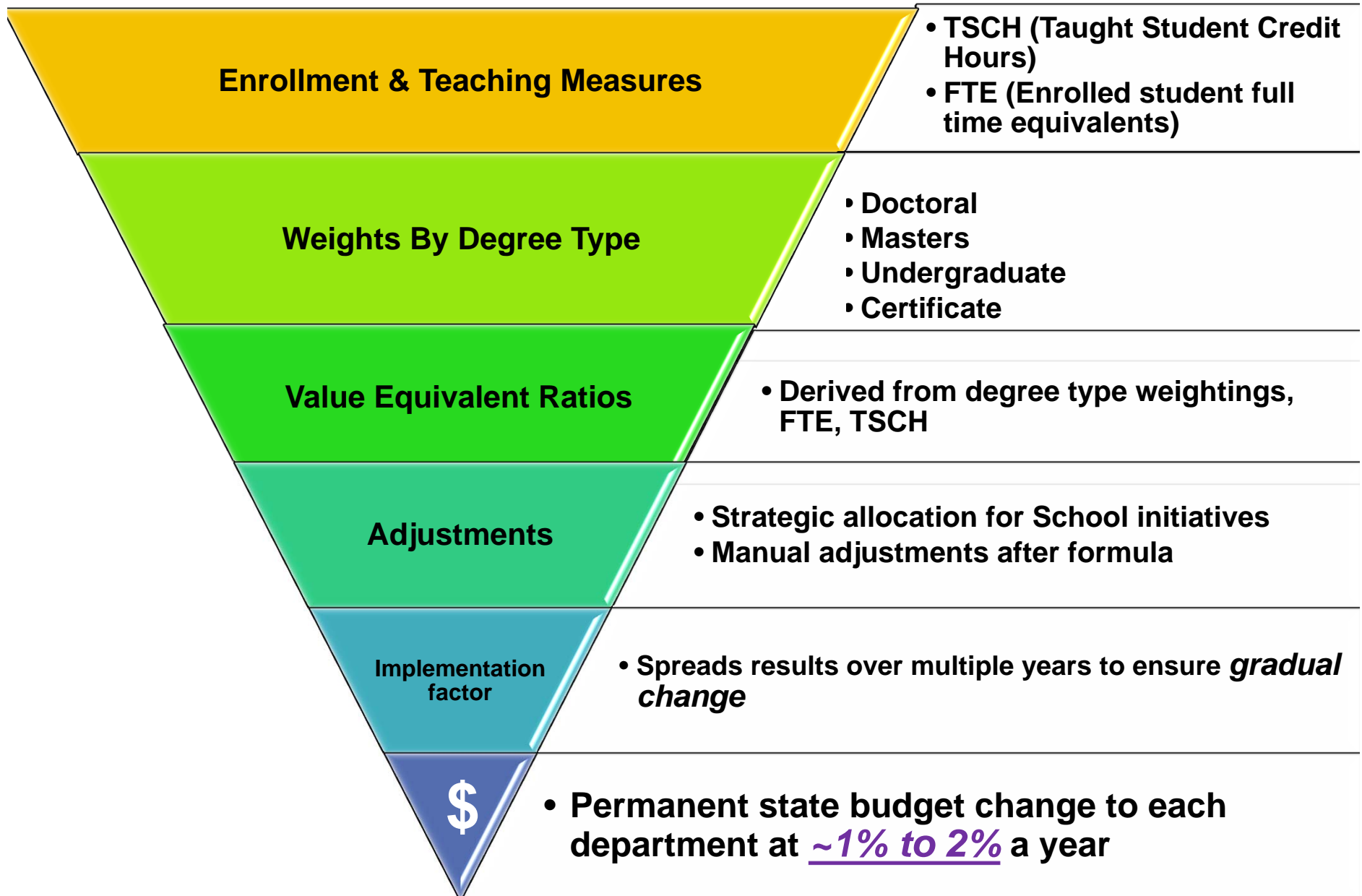


- 🍁 4 have majority masters (>60%)
- 🍁 2 have majority doctoral (>60%)
- 🍁 2 split evenly -- doctoral and masters
- 🍁 4 depts have undergrads
  - ◆ <25% of total dept enrollment
- 🍁 1 has all four types of student enrollment, focused on masters students (60%).
- 🍁 1 has only masters and certificate students.

# SPH ALLOCATION MODEL GUIDING PRINCIPLES



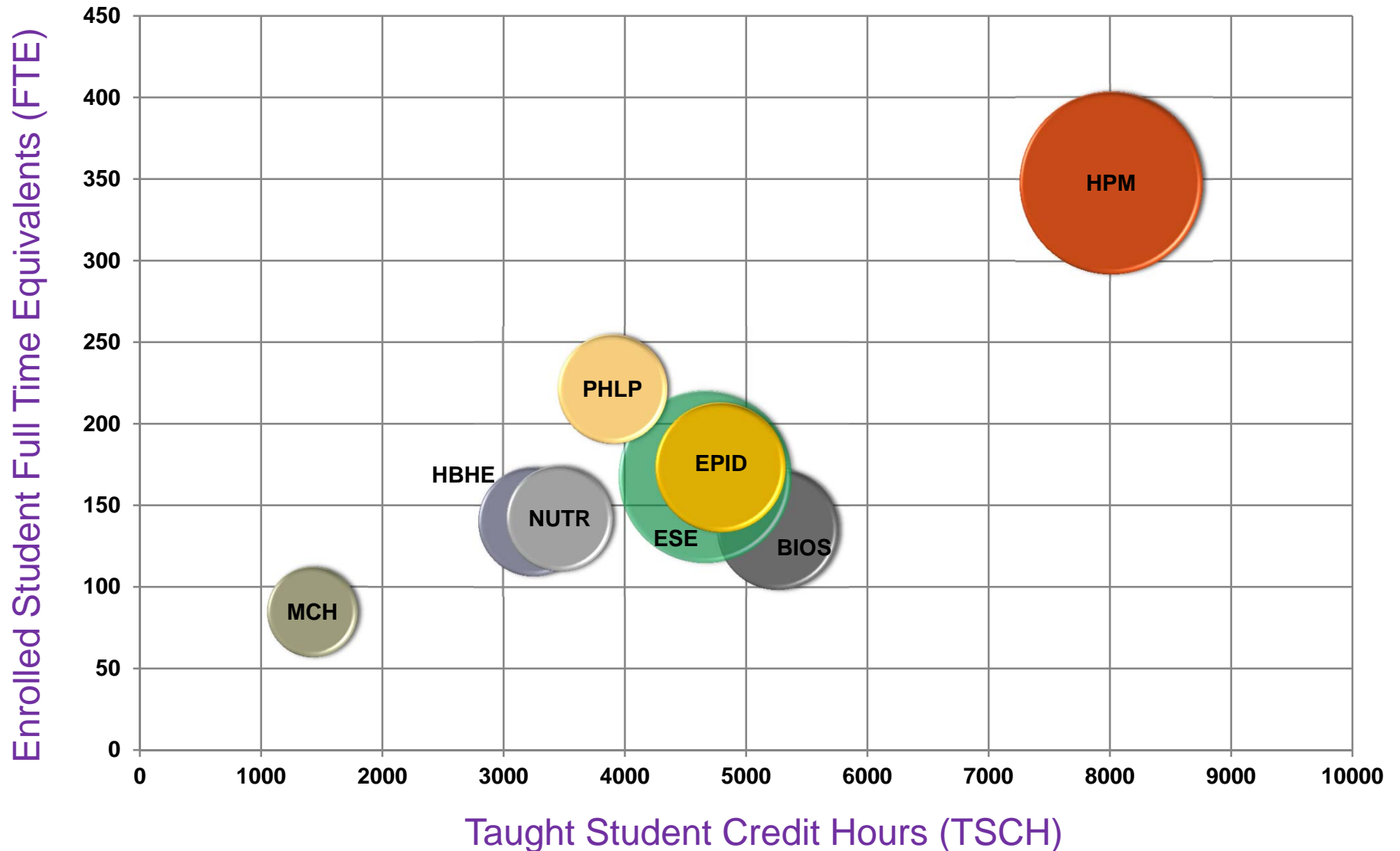
# SPH ALLOCATION MODEL COMPONENTS



# SPH ALLOCATION MODEL VARIABLES

## FALL 2011 / FY 12

*Bubble Size = State Budget*



*TSCH has been estimated for Spring 2012 @ 90% Fall 2011 figures and Summer term @ 100% Summer 2011*



***Thank You***  
***Questions???***