

University Senate Budget Committee (SBC)

Final report to University Senate 2017-2018

This report reflects activities of the Senate Budget Committee in 2017-2018 AY

Charge and Responsibilities of Senate Budget Committee:

Defined by UO Senate Bylaws:

“5.4 The Senate Budget Committee reports to and acts at the direction of the Senate. It is charged with informing the Senate and advising the University President and administration about university financial matters, including budgetary policies and decisions, and long-term financial strategies. In fulfilling its charge, the Senate Budget Committee shall review budget reports submitted to the UO Board of Trustees and obtain pertinent data from the university administration. The University Administration shall provide all financial information requested by the Committee in a timely fashion. The Senate Budget Committee may initiate the study of financial issues and make recommendations to the Senate for Senate action. The Senate Budget Committee may establish working subcommittees.”

Membership:

Elliot Berkman, Psychology; Jane Cramer, Political Science; Ali Emami, Business-Finance (Chair); William Harbaugh, Economics; Laura Leete, Planning-Public Policy & Management; Stephanie McGee, Internal Audit; Chris Sinclair, Mathematics (Senate President); David Wacks, Romance Languages; Ryan Wilson, Business-Accounting.

## 1. Introduction

The SBC serves dual roles. First, we have agreed that we are available to be helpful to the UO Administration and will respect the requests of the administration to maintain confidentiality of the information provided to us in our committee role. We also agreed that our participation in that process should be conveyed to the UO Community in a manner consistent with this role.

In our second role, we serve ready to fulfill our charge from the Senate to help provide a better understanding of important financial issues that affect the university. This role will have a continuing reporting/educational component and a special projects component.

## 2. SBC activities in 2017-2018 Academic Year included:

- A. In January, at Senate leadership’s request, the Senate Budget Committee met with EVP Brad Sheldon and EVP Jamie Moffitt to inform the SBC on the budget model and the current state of the UO budget for 2017-2018.

For Budget reports see: <https://brp.uoregon.edu/content/budget-reports>

For new budget model see:

[https://provost.uoregon.edu/files/uo\\_academic\\_allocation\\_handbook\\_5-24-18.pdf](https://provost.uoregon.edu/files/uo_academic_allocation_handbook_5-24-18.pdf)

- B. In February, we met with EVP Scott Pratt and EVP Brad Shelton for:
- i. Status report on the current Institutional Hiring Plan from EVP Scott Pratt and EVP Brad Shelton.
  - ii. Discussion about the use of operational and research productivity metrics in making Institutional Hiring Plan decisions and other academic investments.  
<https://provost.uoregon.edu/institutional-hiring-plan>
- C. In March, we invited EVP Scott Pratt and EVP Brad Shelton to inform us about past and current metrics, including:
- i. Research metrics, their use and going over examples of reports as requested at last meeting.
  - ii. Operational metrics, their use and examples: (Updated for FY 2018 based on updated source data)  
<https://provost.uoregon.edu/institutional-metrics> .  
[https://provost.uoregon.edu/files/uo\\_academic\\_allocation\\_handbook\\_5-24-18.pdf](https://provost.uoregon.edu/files/uo_academic_allocation_handbook_5-24-18.pdf)  
<https://ir.uoregon.edu/?q=om> :  
[https://ir.uoregon.edu/files/Operational\\_Metrics\\_Glossary\\_01092018.pdf](https://ir.uoregon.edu/files/Operational_Metrics_Glossary_01092018.pdf)  
[https://ir.uoregon.edu/files/Operational\\_Metrics\\_University\\_01092018.pdf](https://ir.uoregon.edu/files/Operational_Metrics_University_01092018.pdf)
  - iii For University Of Oregon And All Participating Public AAU Institutions 2016-17 Comparison of Faculty Salaries see:  
[https://ir.uoregon.edu/sites/ir1.uoregon.edu/files/UO\\_with\\_AAU\\_Publics\\_Dept.pdf](https://ir.uoregon.edu/sites/ir1.uoregon.edu/files/UO_with_AAU_Publics_Dept.pdf)
- Also, upon our request, VPFA & CFO Moffitt informed the SBC about the type of budget data availability for our May meeting.
- D. In May, EVPs Jamie Moffitt and EVP Brad Shelton provided an overview of the University budget in 2019 to SBC, including:
- i. A walkthrough of the information on UO academic and administrative budgets and spending that is available on the web.
  - ii. The budgeting process, timeline, and opportunities for Senate input.  
<https://brp.uoregon.edu/content/budget-reports>

We thank Jamie Moffitt, Scott Pratt and Brad Shelton for their hard work and participation that allows the SBC to function. Thanks also to Chris Sinclair, outgoing Senate President, for his work with the SBC.