

## UHWO Pueo Budget Taskforce

Update 2: 11-02-30

Mahalo for joining today's meeting. In this update are:

- Agenda for Meeting 3: November 3 from 11 am to 1 pm
- Updates
- Data—guidelines for use, requests for additional information, and others
- Process for the work of the Taskforce
- Proposed NEW Schedule

### 1. Meeting 3 Agenda - November 2, 11 am - 1 pm

<https://westoahu.zoom.us/j/94539607205>

Time	Agenda Item
11 am	Greetings
11:05	Reaffirmation of Task Force Operating Agreements <ul style="list-style-type: none"><li>• We are all equals</li><li>• It's okay to disagree</li><li>• Listen as an ally</li><li>• Honor the time limits</li><li>• Agree not to sabotage the group's decision</li><li>• State your intentions up front</li><li>• Decisions will be by agreement</li></ul>
11:10	Reviewing Data Drive guidelines, Cost-Efficiency Template, Revenue Generating Investment Template
12:00	TF work teams
1:00	End

Taskforce members (as of 10-30-20):

#### Team 1

Alphie Garcia  
Caton Liang  
John Murakami  
Reed Young

#### Team 2

Loea Akiona  
Michelle Cohen  
Ross Cordy  
Mary Heller  
Louis Herman  
Ed Keaunui  
Jenna Marcos  
Monique Mironesco  
Princess Soares

#### Team 3

Ka'iu Akamine  
Lori Foo  
Frank Kudo  
Therese Nakadomari  
Marnelli Joy Ulep  
  
Princess Soares

Others not on a work team and are on the Taskforce

Kapono Apao  
Jeff Moniz

Jim Kardash  
Kevin Ishida

Jan Javinar  
Chris Neves

## 2. Updates

- a. Frank (Team 3) is in the process of examining the current budget cost centers with the Budget & Finance offices.
- b. Monique requested the following information (10-31 @ 12:24 pm): I am wondering whether the topics assigned to the three small groups we came up with on Friday - are going to be what the larger campus community is asked to rank? Or will the 120 items from the list of the cost efficiencies document be re-circulated

Here is my response (10-31 @ 12:43): I'm hoping because of the deadline for FY 21 recommendations (as well as FY 22, 23, 24) that the work of the Taskforce to narrow to these three and the information that you all provide in the recommendations will be distributed to our campus 'ohana next Friday. Because the deadlines are not under our control (determined by the BOR), I am hoping that the wisdom of this Taskforce will be the voice put forth to the BOR rather than other voices.

## 3. Data Guidelines

Of importance is the use of up-to-date-best-estimate data to determine both cost efficiency and revenue generating investment recommendations. In addition, open communication that is built on relational trust, data/evidence based recommendations, collective agreement, and safe environment for discussion and deliberation is critical to this effort.

### a. TF Google Drive

This drive has been specifically set up to house the most recent information, especially in response to requests for data from the TF work teams. As we know, before such information is shared publically, it must be ADA compliant. As such, there will be a lag in posting each updated document to the webpage for this work. Should you need any of the information in this drive for use with others on our campus, please request the document from Walter and/or Chris. *Please do not share documents directly from this drive.*

[https://drive.google.com/drive/u/0/folders/1ilwbcnP1CnnEgd\\_A\\_syCl16IC1fN3Cze](https://drive.google.com/drive/u/0/folders/1ilwbcnP1CnnEgd_A_syCl16IC1fN3Cze)

### b. Webpage Data

all information used by this TF will be posted onto our dedicated webpage—see <https://westoahu.hawaii.edu/about/leadership/planning-process/resources/>

Please refer folks to this site to view the information used.

## 4. Process for the work of the Taskforce

Finding the right balanced equation of Cost Efficiencies (template) + Revenue Generating Investments (template) = Recommendations to meet Fiscal Year shortfall.

Inherent in this work is the need to find the right mix of cost efficiencies and revenue generating investments to ensure UHWO's future sustainability and uniqueness. The following templates will help TF work teams to present their recommendation(s) to the TF and wider audiences in a clear, consumable/understandable way.

Cost Efficiency Recommendation Template

Team # \_\_\_ [List the Names of the Team members]

Date of Submission

Budget year: Fiscal Year [FY] \_\_\_

**Recommendation**

[Clear, concise statement of action—e.g. The Pueo Budget Taskforce recommends that the UHWO utilize its reserves to meet the projected budget shortfall for FY21 [est. @ \$1.765 million]:

**Objectives for Reduction/Efficiency**

[Clear, concise objectives to be met by the recommended action—e.g. This recommendation will: a. meet the FY21 projected budget shortfall without harming current programs, personnel, and operations; b. allow for additional time to prepare for further budget reductions; c. allow for additional time to develop and implement revenue generating investments.]

**Alignment with Campus & UH system mission and vision as well as strategic and other plans**

Please address this recommendation meets the UH System Strategic Plan and UHWO Strategic Action Plan (may include other plans like—UHWO’s IAFP).

*UH System Strategic Plan*

*UHWO Strategic Action Plan*

- A. Optimization Formula [OF] – use of resources on tactics that strategically align with UH System and UH West O’ahu plans and diversify to increase revenue streams.
- B. Customer Value Proposition [CVP] - supports educational experiences that enhance the 21st Century learner-leaders through an engaging, dynamic, state-of-the-art collegiate environment.
- C. Value Chain [VC] – introduction of a concentration without incurring cost while optimizing effort and increasing prosperity.
- D. Strategic Positioning [SP] - maximizes UH West O’ahu’s position through leadership, improving differentiation/uniqueness, and advancing our competitive advantage.

**Cost Efficiency Savings**

For FY \_\_\_, this recommendation will meet UHWO’s budget shortfall in the following way...

Previous Expenditure/Cost (what was spent over the last couple of years)	Proposed Budget Saving (for this Fiscal Year)	Estimated percentage of total Budget Shortfall for this Fiscal Year (FY21 @ \$1.765M)

If appropriate, this alternative recommendation will meet UHWO’s budget shortfall in the following way (to be used for variations of this recommendations)...

Previous Expenditure/Cost (what was spent over the last couple of years)	Proposed Budget Saving (for this Fiscal Year)	Estimated percentage of total Budget Shortfall for this Fiscal Year (FY21 @ \$1.765M)

**Other Information:**

Revenue Generating Investment Recommendation Template

Team # \_\_\_ [List the Names of the Team members]

Date of Submission

Budget year: Fiscal Year [FY] \_\_\_

**Recommendation**

[Clear, concise statement of action—e.g. The Pueo Budget Taskforce recommends that the UHWO invest in creating a Concentration in Data Analytics under the Bachelor of Arts in Business Administration for FY22]:

**Objectives for Investment**

[Clear, concise objectives to be met by the recommended action—e.g. This recommendation will: a. provide students with an understanding of data governance and the ethical use of data, hands-on experience visualizing data, and understanding the data analytics workflow; b. increase tuition-generated revenue via increased student enrollment; c. align with UHWO’s move to innovate and become more self-sustaining.]

**Alignment with Campus & UH system mission and vision as well as strategic and other plans**

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**Revenue Generation**

For FY \_\_\_, this recommendation will meet UHWO’s budget shortfall in the following way...

Long-term occupation projections for Hawai’i	Other “like” program competition for Students (Enrollment in “like” programs)—a.k.a. non-duplication of programs	Market Interest (If available)

<b>UHWO Investment—personnel, resources, other needs to implement and grow this recommendation</b>	<b>General Design—courses, student requirements, others</b>	<b>Estimated Return on Investment (ROI)—projections for 3 years after implementation</b>

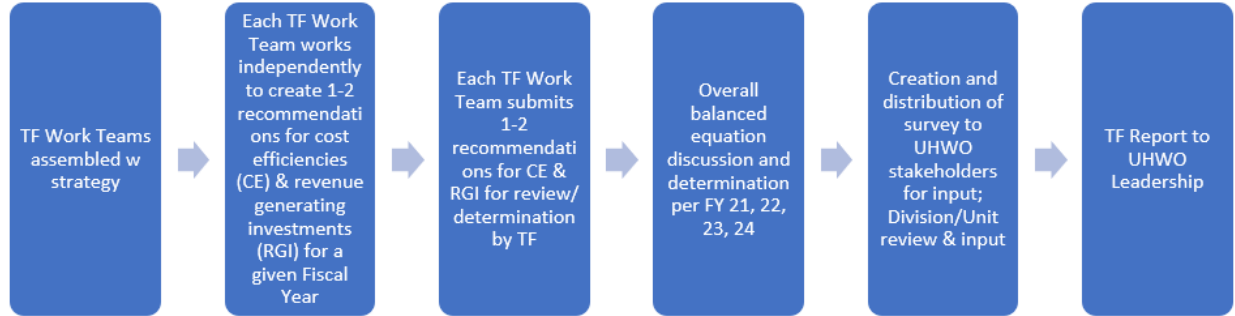
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<b>UHWO Investment—personnel, resources, other needs to implement and grow this recommendation</b>	<b>General Design—courses, student requirements, others</b>	<b>Estimated Return on Investment (ROI)—projections for 3 years after implementation</b>

**Other Information:**

## Taskforce Work Process



## 5. Proposed New Schedule

### Week of October 26-30

#### Meetings

- Meeting 1: October 28 (11 am-1 pm)—All Taskforce members
- M2: October 30 (1-4 pm)—All Taskforce members

### Week of November 2-6

#### Meetings

- M2: November 2 (11 am -1 pm)—TF Work Teams with Facilitator Support
- ~~M4: Nov. 4—TF TF Work Teams w Fac Support~~
- M5: Nov. 5 (1-3 pm)—All Taskforce members (\*cancel am mtg time)

#### Outputs

1. FY 21 Cost Efficiency Recommendations Due 11/5
2. Survey to UHWO; Unit input

#### Next Steps

1. Post results of UHWO input
2. Develop budget proposal & Submit to System Office/BOR (?)

### Week of November 9-13

#### Meetings

- M6: Nov. 9-10— TF Work Teams w Fac Support
- M7: Nov. 12—All Taskforce members
- M8: Nov. 12-13— TF Work Teams w Fac Support

#### Outputs

1. FY 22 Cost Efficiency & Revenue Generating Investment Recommendations Due 11/12
2. UHWO input

## **Next Steps**

1. Post results of UHWO input
2. Develop budget proposal & Submit to System Office/BOR (?)

## Week of November 16-20

### **Meetings**

- M9: Nov. 16-18—TF Work Teams w Fac Support
- M10: Nov. 19—All Taskforce members

### **Outputs**

1. FY 23 CE & RGI Recommendations Due 11/19

## **Next Steps**

1. Post results of UHWO input
2. Develop budget proposal & Submit to System Office/BOR (?)

## Weeks of November 23-25 & November 30-December 2

### **Meetings**

- M11: Nov. 20-23—TF Work Teams w Fac Support
- M12: Nov. 24—All Taskforce members

### **Outputs**

1. FY 24 CE & RGI Recommendations Due 11/24

## **Next Steps**

1. Post results of UHWO input
2. Develop budget proposal & Submit to System Office/BOR (?)