

## UHWO Pueo Budget Taskforce

Update 3: 11-04-30

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

- Agenda for Meeting 3: November 5 from 1 pm to 3 pm
- Updates
- Recommendation presentations for FY21 from each team

### 1. Meeting 3 Agenda—November 5, 1 pm - 3 pm

<https://westoahu.zoom.us/j/99723128278>

Time	Agenda Item
1 pm	Greetings
1:05	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>
1:10	Team 3: Review and discussion of overall cost-center expenditures and possible recommendations for cost efficiencies
1:50	Team 1: Facilities and Resource Efficiencies
2:20	Team 2: Maximization of Course Delivery & Offerings
2:50	Review of all Recommendations to be sent in Survey to UHWO stakeholders—rank order the recommendations.

### 2. 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

- 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)

## **Output**

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

## **Next Step**

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 (10 am-1 pm)—All Taskforce members
- M8: Nov. 12-13— TF Work Teams w Fac Support

## **Output**

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

## **Next Step**

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 (10 am-1 pm)—All Taskforce members

## **Output**

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

## **Next Step**

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 (10 am-1 pm)—All Taskforce members

## **Output**

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

### Next Step

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

### Taskforce members (as of 11-2-20):

#### **Team 1: Facilities & Resource Efficiencies**

Alphie Garcia  
Caton Liang  
John Murakami  
Reed Young

#### **Team 2: Maximization of Course Delivery & Offerings**

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

#### **Team 3: Cost-Center Analysis**

Ka'iu Akamine  
Lori Foo  
Ed Keaunui  
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

### **3. Updates**

- A request from MNHS to add a faculty member to this Task Force. Please respond to today's email from me.
- In preparation for the stakeholder survey, we will use the information from the template to present each recommendation. Please complete the Cost Efficiency Recommendation Template and *send it to me at least an hour before our meeting tomorrow.*

### **4. Presentation of FY21 Cost Efficiency Recommendations**

Team 3: Review and discussion of overall cost-center expenditures and possible recommendations for cost efficiencies

Team 1: Facilities and Resource Efficiencies

Team 2: Maximization of Course Delivery & Offerings

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. @ \$1.1 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...

<b>Previous Expenditure/Cost (what was spent over the last couple of years)</b>	<b>Proposed Budget Saving (for this Fiscal Year)</b>	<b>Estimated percentage of total Budget Shortfall for this Fiscal Year (FY21 @ \$1.1M)</b>

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

<b>Previous Expenditure/Cost (what was spent over the last couple of years)</b>	<b>Proposed Budget Saving (for this Fiscal Year)</b>	<b>Estimated percentage of total Budget Shortfall for this Fiscal Year (FY21 @ \$1.1M)</b>

**Other Information:**

## Taskforce Work Process

