

UHWO Pueo Budget Taskforce

Update 4: 11-10-30

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

1. Agenda for Meeting 4
2. Schedule & Tasks
3. Updates
4. Recommendation presentations for FY21 from each team

1. Meeting 4 Agenda—November 12, 10 pm - 1 pm

<https://westoahu.zoom.us/j/96590163835>

Time	Agenda Item
10 am	Greetings
10:05	Reaffirmation of Task Force Operating Agreements <ul style="list-style-type: none">• We are all equals• It's okay to disagree• Listen as an ally• Honor the time limits• Agree not to sabotage the group's decision• State your intentions up front• Decisions will be by agreement
10:10	Review of Tasks & Address Questions
10:20	Work Teams—Recommendations (Cost Efficiencies & Revenue Generating Investments)
11:00	Review of Recommendations—Work Teams 1, 2, 3
12:30	Review of all Recommendations to be sent in Survey to UHWO stakeholders—rank order the recommendations.

2. Schedule & Tasks

Week of November 9-13

Meetings

- M6: Nov. 9-10— TF Work Teams w Fac Support for FY 22 Recommendations
- 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 FY 22 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 for FY 23 Recommendations
- M10: Nov. 19 (10 am-1 pm)—All Taskforce members

Output

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

Next Step

1. Post FY 23 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 for FY 24 Recommendations
- M12: Nov. 24 (10 am-1 pm)—All Taskforce members

Output

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

Next Step

1. Post FY 24 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
Kamuela Yong

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. Work teams should be preparing cost efficiency and revenue generating investment recommendations for FY 22. The balanced equation we are striving for is:

Cost-Efficiencies + Revenue Generating Investments = Project Deficit of \$2.8 Million (Fiscal Year 22)

- b. When creating a Revenue Generating Investment, please refer to the data offered in the drive & forward questions to be addressed by Budget and Finance. To create these, please tap into other staff and faculty to produce these investments. **Each REVENUE GENERATING INVESTMENT should be based on realistic projects and numbers.**
- c. (from Louis Herman) In terms of the notes for each meeting, since Chris Neves has been out of the office, we do not have an official note taker. Would someone kindly step up to take notes for our meetings?
- d. (from Monique on behalf of others) What are the restrictions for participating in the survey?

4. Presentation of FY22 Cost Efficiency Recommendations

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...

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 @ \$1.1M)

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 @ \$1.1M)

Other Information:

Revenue Generating Investment Recommendation Template

***please see sample BABA proposal in the data drive**

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

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.

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)

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

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

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)

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

Other Information: