

UHWO Pueo Budget Taskforce

Update 5: 11-17-20

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

1. Agenda for Meeting 5
2. Schedule & Tasks
3. Updates
4. Recommendation presentations for FY21 from each team
<https://westoahu.zoom.us/j/94759229261>

1. Meeting 5 Agenda—November 19, 10 am - 1 pm

| 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 FY21 Report |
| 10:20 | Budget Balancing Exercise |
| 11:00 | Review of Recommendations for FY 22-23—Work Teams 1, 2, 3 |

2. Schedule & Tasks

Week of October 26-30 (Completed)

Meetings

- Meeting 1: October 28 (11am – 1pm) – All Task Force Members
- Meeting 2: October 30 (1pm – 4pm) – All Task Force members

Outputs

Week of November 2 -6 (Completed)

Meetings

- M2: November 2 (11am – 1pm) – TF Work Team with Facilitator Support
- ~~M4: November 4 – TF TF Work Teams with Facilitator Support~~
- M5: November 5 (1pm – 3pm) – 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 (Completed)

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

Outputs

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

Next Steps

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

Outputs

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

Next Steps

2. Post FY 23 results of UHWO input
3. 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

Outputs

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

Next Steps

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

Others not on a work team and are on the Taskforce

- | | | |
|--|---|---|
| <ul style="list-style-type: none"> • Kapono Apao • Jim Kardash | <ul style="list-style-type: none"> • Jan Javinar • Jeff Moniz | <ul style="list-style-type: none"> • Kevin Ishida • Chris Neves |
|--|---|---|

3. Updates

- a. Budget Balancing Exercise—Work teams should be preparing cost efficiency and revenue generating investment recommendations for FY 22-23. The balanced equation we are striving for is:

**Cost-Efficiencies + Revenue Generating Investments = Project Deficit of \$2.8 Million
(Fiscal Year 22-23)**

- 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.**

4. Presentation of FY22-23 Cost Efficiency & Revenue Generating Recommendations

Cost Efficiency Recommendation Template

Team # _____ [List the Names of the Team members]
 Budget year: Fiscal Year [FY] _____

Date of Submission

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).

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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) |
|--|--|--------------------------------|
| | | |

| 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 |
|---|--|---|
| | | |

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|---|---|---------------------------------------|
| | | |

| 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: