Finance Literacy
Temporary Academic Support (TAS) and Our Mission

Benjamin Hermalin
Vice Provost for the Faculty and Thomas & Alison Schneider
Distinguished Professor of Finance and Professor of Economics

Jon Bain-Chekal
Executive Director, Financial Planning and Analysis

Kira Blaisdell-Sloan
Institutional Research Analyst, Office of Planning and Analysis

Maya Woodson Turman
Business Process Driver, Financial Planning and Analysis

3/16/18
Sibley Auditorium
10:00 – 11:30 a.m.
Agenda

• Context
• Challenge
• TAS Defined
• History
• Current Process
• Future Vision

Bingo!

<table>
<thead>
<tr>
<th>Name 3 Ways TAS is Funded</th>
<th>Sources</th>
<th>Who sets Enrollment Targets?</th>
<th>Committee of Z</th>
<th>What is happening to State Support?</th>
</tr>
</thead>
<tbody>
<tr>
<td>$/SCH</td>
<td>Transparency</td>
<td>EVCP TAS Allocation</td>
<td>Excellence &amp; Access</td>
<td>Uses</td>
</tr>
<tr>
<td>What Types of Courses are Covered under TAS Eligible SCH?</td>
<td>Pedagogy / Pedagogical</td>
<td>What is TAS?</td>
<td>Comprehensive Excellence</td>
<td>Go Bears!</td>
</tr>
<tr>
<td>Name 3 Indicators of Instructional Need</td>
<td>Our Berkeley Site</td>
<td>Fee Remission</td>
<td>Common Good Curriculum</td>
<td>Incremental vs Metrics Informed</td>
</tr>
<tr>
<td>Enrollments</td>
<td>Sproul Hall</td>
<td>Year Used for Baseline Data in Current Model?</td>
<td>Future Model</td>
<td>Ben, Jon, Kira &amp; Maya</td>
</tr>
</tbody>
</table>
Learning goals

• Why do we need Temporary Academic Support? Who does it fund? And why is this need increasing?

• How have we allocated resources in the past? Why did we change?

• How can we refine resource allocations to create transparency and positive incentives?

• What are the components of our instructional cost structure?

• How does it all fit together into our current TAS Model?
Teaching is central to our mission

UC Berkeley is a place of immense intellectual vitality, where some of today’s brightest students and scholars work together to deepen understanding of the world we live in. It is also a place that is steadfastly committed to widening the doors to educational opportunity, a place that sets young people from all backgrounds on a path towards success in their lives and in their careers. This combination of excellence and access is what defines and animates us; it is truly Berkeley’s DNA.
The state has been disinvesting in UC...
...while insisting on growth across the UC system
Berkeley faced a lot of growth, very quickly.

Campus enrollment has grown by 11% since 2010-11, totaling nearly 40,000 students in 2016-17.
The Challenge

How to effectively accommodate the increased enrollments across the Berkeley Campus?

1. How many more students are coming each year?
   - Acceptance rates
   - Diversity
   - Depth of Pool
   - National Reputation

2. How is demand changing across campus?
   - Which courses will grow?
   - What are the shifts between areas of study?

3. How much will it cost to meet demand?
   - How much will the growth cost?
   - How much do we need to increase baseline funding to keep pace with inflation?

4. Can we get the funds to the correct location in time?
   - Decisions on space and hiring are made 5 to 6 months in advance
What is TAS?

- TAS stands for Temporary Academic Support.
- It is a long-standing set of expenses related to organizing and funding temporary faculty, graduate student instructors (GSIs), readers and tutors to assist the permanent faculty in mounting the full curriculum of an academic unit.
- Primarily related to undergraduate curriculum, but also supports graduate instruction to a lesser extent.
Instructional support

External Sources

- Enrollment Based State Funding
- Tuition and Fees
- Philanthropy

Uses

- Academic Salaries & Benefits
- Lecturers, Adjuncts Salaries & Benefits
- GSI, Reader, Tutor Salaries & Benefits
- Fee Remissions
- Other

TAS
How is TAS funded?

1. Annual EVCP TAS Allocation
2. Non-recurrent positions in the Permanent Budget (some units, not all)
3. Salary Savings (most units, not all)
4. Common Good Curriculum funding (some units, not all)
5. Interdepartmental Transfers
6. Supplemental EVCP TAS
7. Negotiated Commitments
History of the EVCP TAS allocation

- The EVCP TAS allocation has always been a relatively small part of the total funding for TAS.
- Did not move with enrollments.
- Used an incremental budgeting approach.
- None of the typical indicators of instructional need (SCH, # of majors, # of temporary instructional staff) were found to consistently correlate with existing allocations.
- The process was not transparent.
TAS Funding overall has been opaque
History- EVCP TAS allocation methodologies have changed over time

AY 2014-15
- Incremental EVCP TAS Flat
- CGC 3%

AY 2015-16
- Incremental EVCP TAS & CGC 3%

AY 2016-17
- Transition Year
- Hybrid metrics informed model
  - 75% Historical
  - 25% Metrics

AY 2017-18
- Metrics informed model
  - Inflation Adjusted Historical Base + 100% of Growth

AY 2018-19
- Metrics informed model
  - Inflation Adjusted Historical Base + 100% of Growth
History- EVCP TAS allocation methodologies have changed over time

- **AY 2014-15**: Incremental EVCP TAS Flat CGC 3%
- **AY 2015-16**: Incremental EVCP TAS & CGC 3%
- **AY 2016-17**: Hybrid metrics informed model:
  - 75% Historical
  - 25% Metrics
  (Transition Year)
- **AY 2017-18**: Metrics informed model
  - Inflation Adjusted Historical Base
  - + 100% of Growth
- **AY 2018-19**: Metrics informed model
  - Inflation Adjusted Historical Base
  - + 100% of Growth

• **Clarity and transparency** -- Fulfill curricular needs primarily with departmental instructional resources (base), using EVCP supplement for instructional needs over and above the base.

• **Responsiveness** -- Be responsive to changes in instructional workload metrics (increase/decrease).

• **Flexibility** -- Build-in flexibility of resources in order to accommodate reasonable transitions and bridging strategies.

• **Outcome driven** -- Support time to degree and degree completion.

• **Comprehensive Excellence** -- Continue to allow for broad academic offerings and support interdisciplinary and collaborative efforts in teaching.

• **Pedagogical variation** -- Sensitive to differences in the way departments teach, and the variable cost of these differences.
Current Process: Not all instruction and SCH cost the same amount; everyone should get what they need.
Berkeley has been investing in instruction

FY 10 to FY 18 growth 198%

FY 10 to FY 18 growth 17%
We built a multi-dimensional model
Framework for the current EVCP TAS allocation model

- Based on the cost of instruction and undergraduate SCH
- Increases when salaries grow
- Funding changes with student enrollments
- Sensitive to diverse pedagogical methods
- Does not overly harm or reward, but funds incremental costs
- Transparent, rational, and informed by metrics
Current Process: New EVCP TAS allocation model elements

- 2015-16 Actual 19900 and CGC Costs
- Cost Increases
- 2015-16 TAS Eligible SCH
- Projected Campus SCH Growth
- FY 2018-19 TAS Allocation
Current Process: New EVCP TAS allocation model elements

- Students Credit hours by credited department.
- For Colleges includes upper and lower division primary courses. For Schools also includes graduate level primary SCH.
- Excludes Concurrent Enrollment and Self Supporting SCH and all SCH generated by courses not typically paid for by TAS funding at the course level (Freshman Sophomore seminars, B-Connect, independent, group study, fieldwork).
Curriculum component

How many extra students do we expect to take courses in each department?

2015-16 Baseline Data

2018-19 Projected Data

- Projections of 2018-19 SCH additional based on 2015-16 student behavior
- Adjustments for changes in behavior (assortment shift)
Current Process: New EVCP TAS allocation model elements

Cost of all of the salary, CBR, and remittable fees and health insurance actually paid for TAS payroll expenses in 2015-16.
Instructional cost component

What would it cost to teach those same students today?

2015-16 Baseline Data

Total actual spend on TAS title codes (campus funds)

2018-19 Projected Data

- Union mandated wage increases
- Remittable fee increases
- CBR increases
**Final model formula**

### 2015-16 Baseline Data

- Cost inflated 2015-16 baseline EVCP TAS & CGC allocation
- Projected TAS eligible SCH
- Cost inflated $/SCH per department

### 2018-19 TAS Formula

- Cost inflated 2015-16 baseline EVCP TAS & CGC allocation
- Projected growth in TAS eligible SCH
- A cost inflated $/SCH per department
Future vision

AY 2014-15
Incremental EVCP TAS Flat CGC 3%

AY 2015-16
Incremental EVCP TAS & CGC 3%

AY 2016-17
Hybrid metrics informed model
75% Historical
25% Metrics

Transition Year

AY 2017-18
Metrics informed model
Inflation Adjusted Historical Base + 100% of Growth

AY 2018-19
Metrics informed model
Inflation Adjusted Historical Base + 100% of Growth

The Future
Future – Comprehensive model

• The current model is a step in the right direction, but it only focuses on the EVCP TAS allocation, doesn’t address the complexity of the various TAS funding mechanisms and doesn’t address the inequities within the base allocation.

• The vision for the future is to develop a comprehensive model that evaluates the total need and cost for all Campus funded Temporary Academic Support that will:
  – Collapse funding mechanisms into one or two allocations
  – Able to incorporate curricular changes
  – Responsive to changes in faculty teaching strength
  – Provides historical TAS staffing levels
  – Funds enrollment growth where it happens
  – Easily used by the departments and divisions
Future

External Sources

- Enrollment Based State Funding
- Tuition and Fees
- Philanthropy

Channel (Funding Mechanism)

Flexible, Metrics-Informed Allocation to Fund All Teaching
- Responsive to Changes in Faculty Teaching Strength
- Provides Historical TAS Staffing Levels
- Funds Enrollment Growth Where It Happens
- Easily Used by the Departments and Divisions

Uses

- Academic Salaries & Benefits
- Lecturers and Adjuncts Salaries & Benefits
- GSI, Reader, Tutor Salaries & Benefits
- Fee Remission
I wonder what teachers make.

A difference Peppermint Patty, they make a difference!
Thank You! And...

GO BEARS!

Visit cfo.berkeley.edu for more information