Finance Literacy
Temporary Academic Support (TAS) and Our Mission

Presented March 16, 2018

Berkeley | Office of the Chief Financial Officer

Agenda

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

Bingo!

Name 3 Ways TAS is Funded	Sources	Who sets Enrollment Targets?	Committee of 2	What is happening to State Support?
$/SCH	Transparency	EVCP TAS Allocation	Excellence & Access	Uses
What Types of Courses are Covered under TAS Eligible SCH?	Pedagogy / Pedagogical	**What is TAS?**	Comprehensive Excellence	Go Bears!
Name 3 Indicators of Instructional Need	Our Berkeley Site	Fee Remission	Common Good Curriculum	Incremental vs Metrics Informed
Enrollments	Sproul Hall	Year Used for Baseline Data in Current Model?	Future Model	Ben, Jon, Kira & Maya

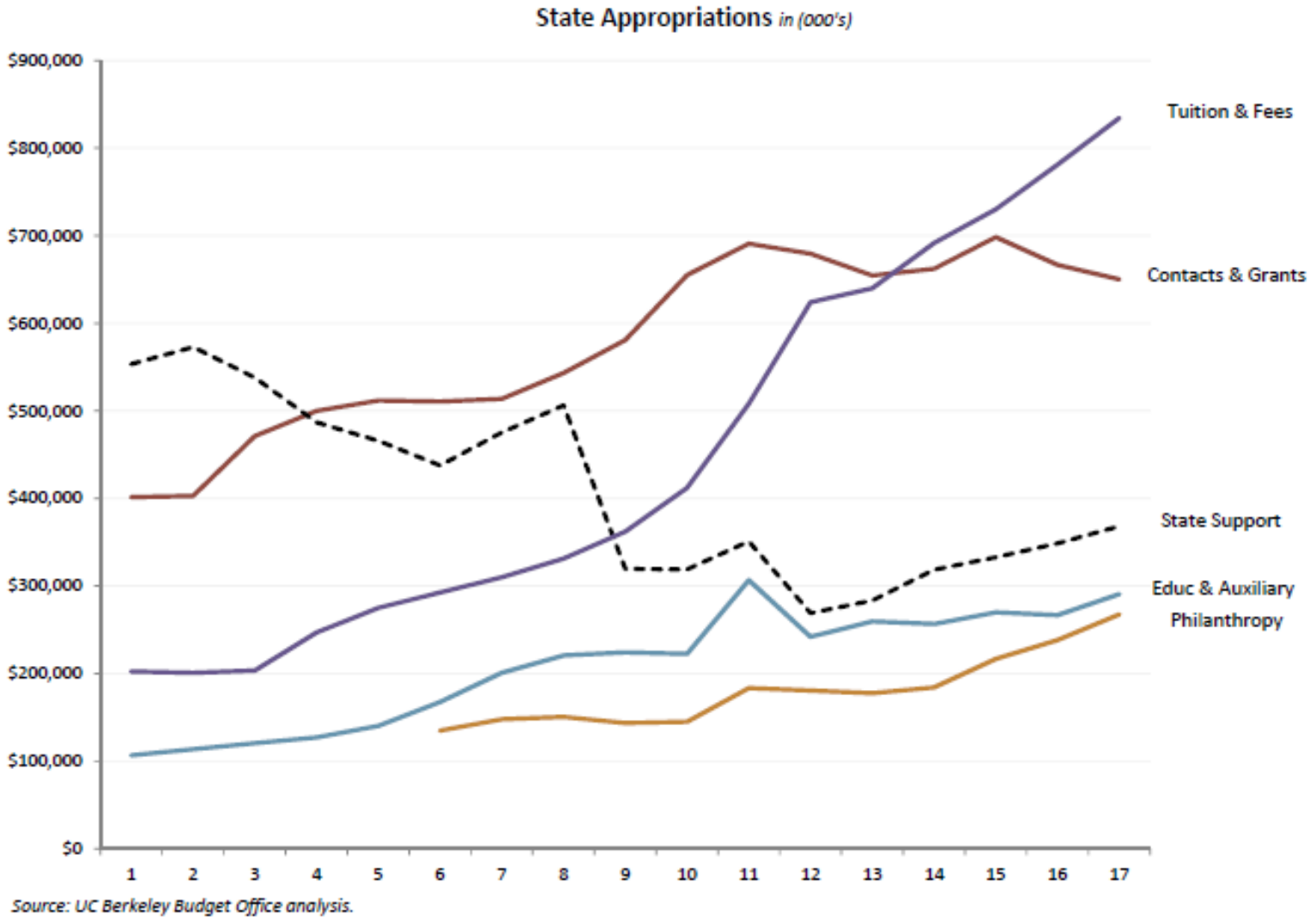
Learning goals

- *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…



Source: UC Berkeley Budget Office analysis.

…while insisting on growth across the UC system

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Trump's California schedule, hour-by-hour

Live updates: Trump arrives in California at 11:30 a.m. for his first trip here since 2016

Trump abruptly ousts Tillerson as secretary of State, replaces him with CIA chief

Trump arrives in California for first visit as president, confronting the resistance...

Watch liv after abr

you earn 60-month Online CD *See terms in footnote Member FDIC

EDUCATION

UC regents approve plan to add 10,000 in-state undergraduate students by 2018

By LARRY GORDON NOV 19, 2015 | 9:55 PM | SAN FRANCISCO

Berkeley faced a lot of growth, very quickly

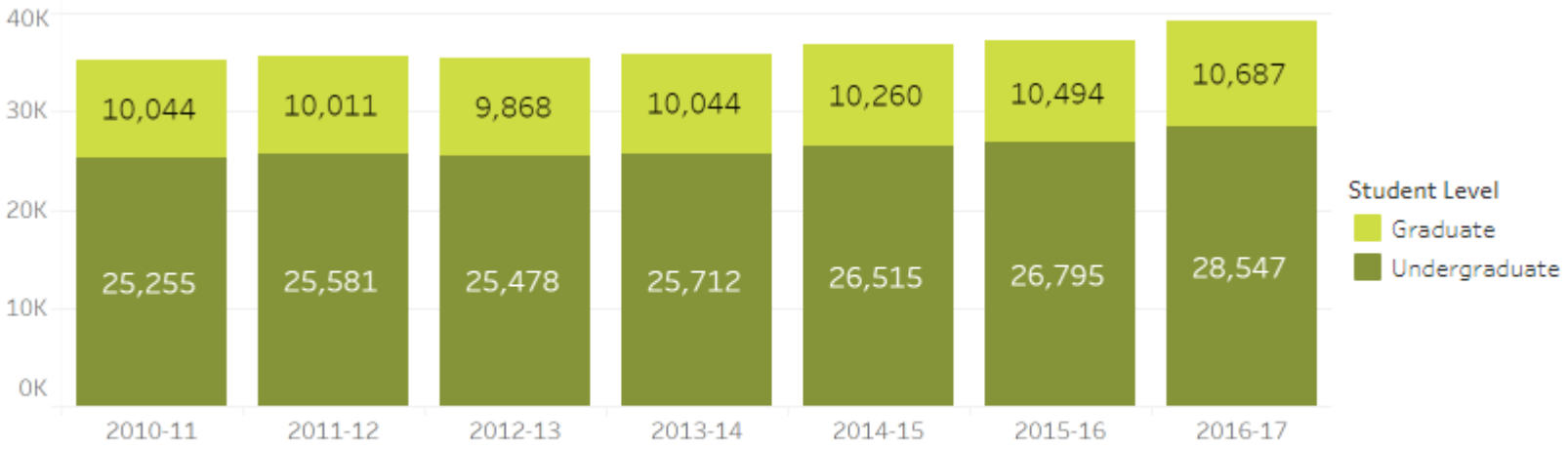
Our Berkeley

OPA Home » Our Berkeley » Student Enrollments

Student Enrollments

Total Student Population Growth | Undergraduate vs. Graduate Counts | Incoming Undergraduates | UG Population by Residency | Underrepresented Minority Growth | Now it's Your Turn Explore the Data :

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



Fall/Spring year-average headcount. Mouse-over the bars to view heacount as a percentage of total campus population.

The Challenge

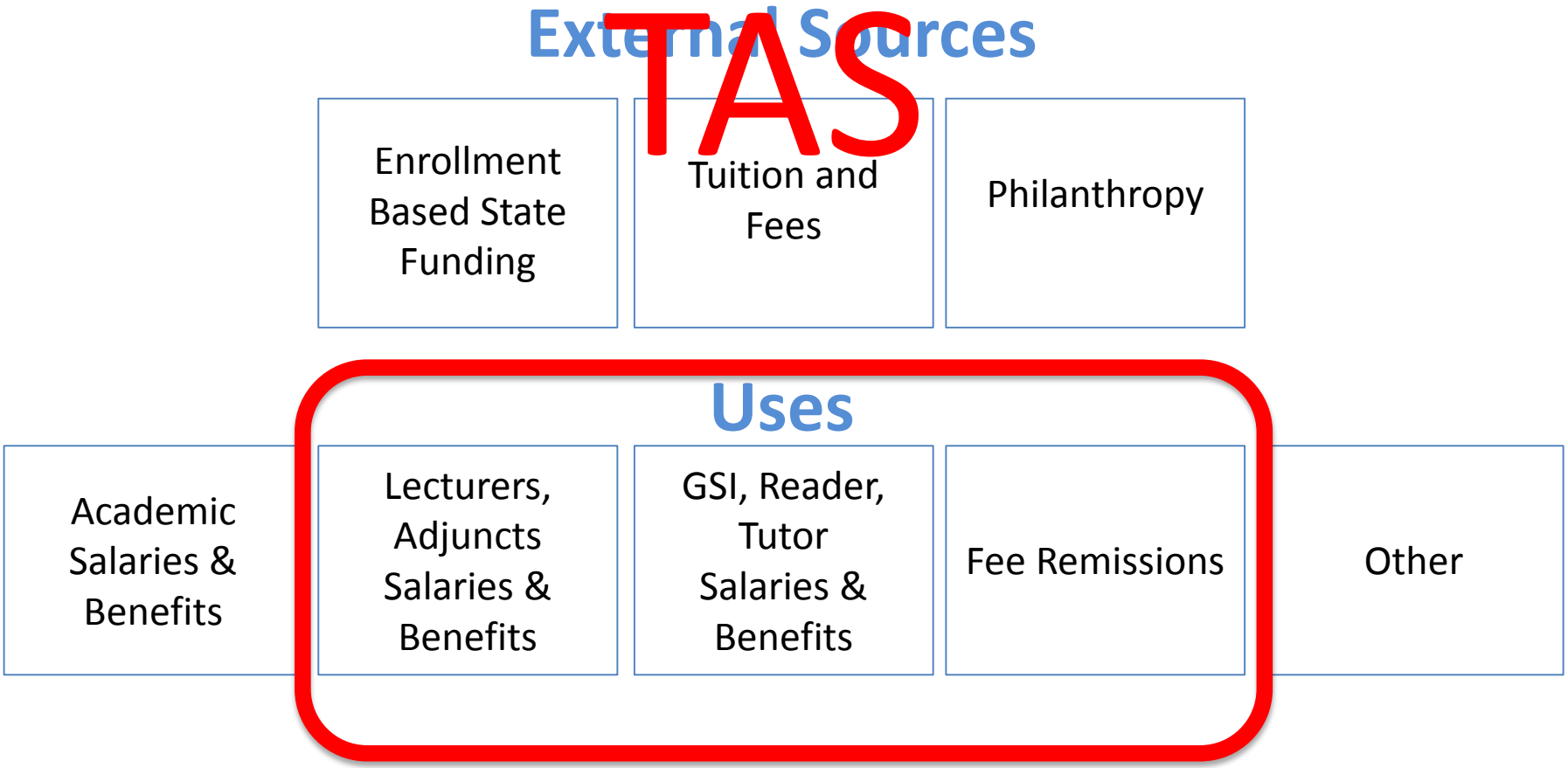
How to effectively accommodate the increased enrollments across the Berkeley Campus?

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



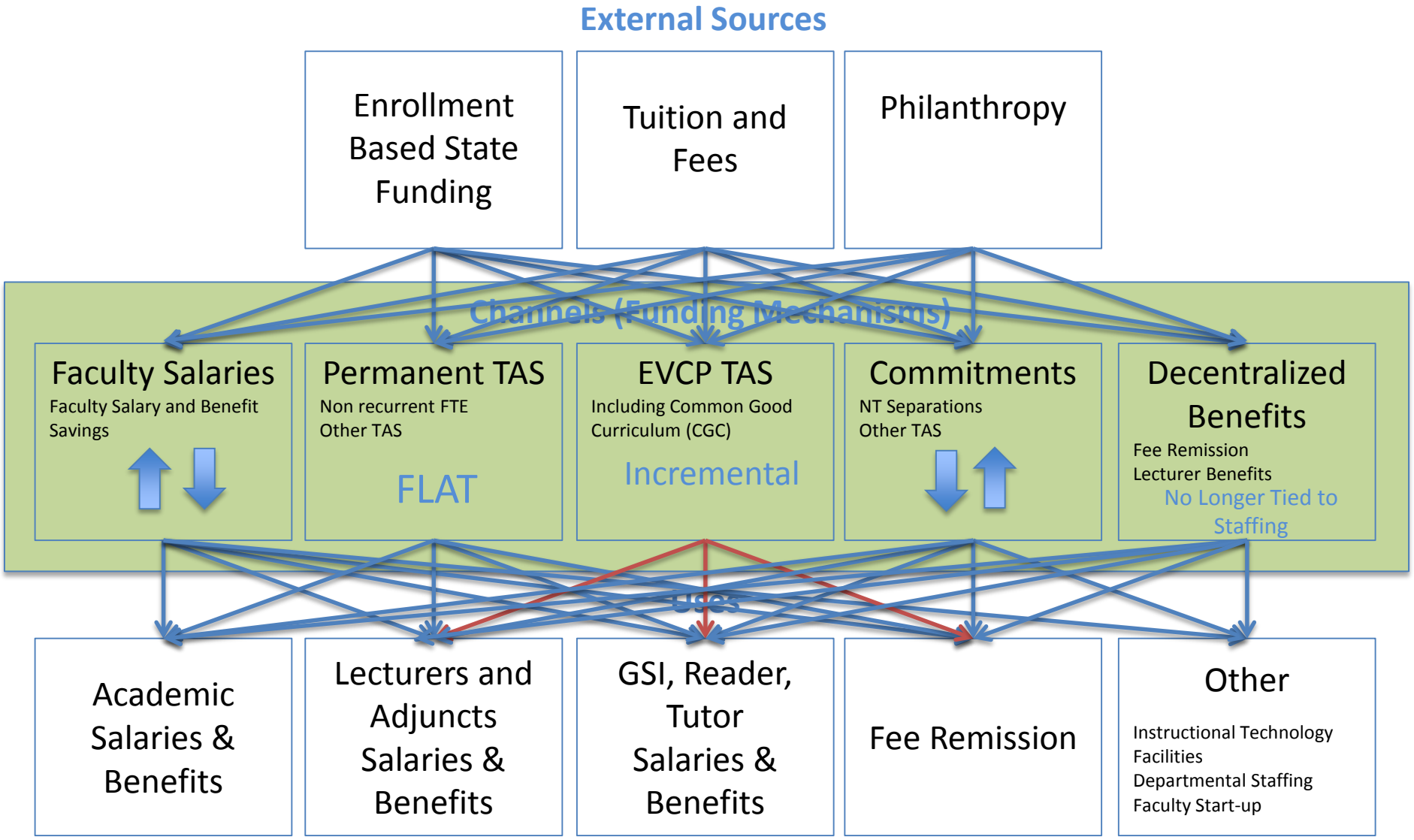
How is TAS funded?

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

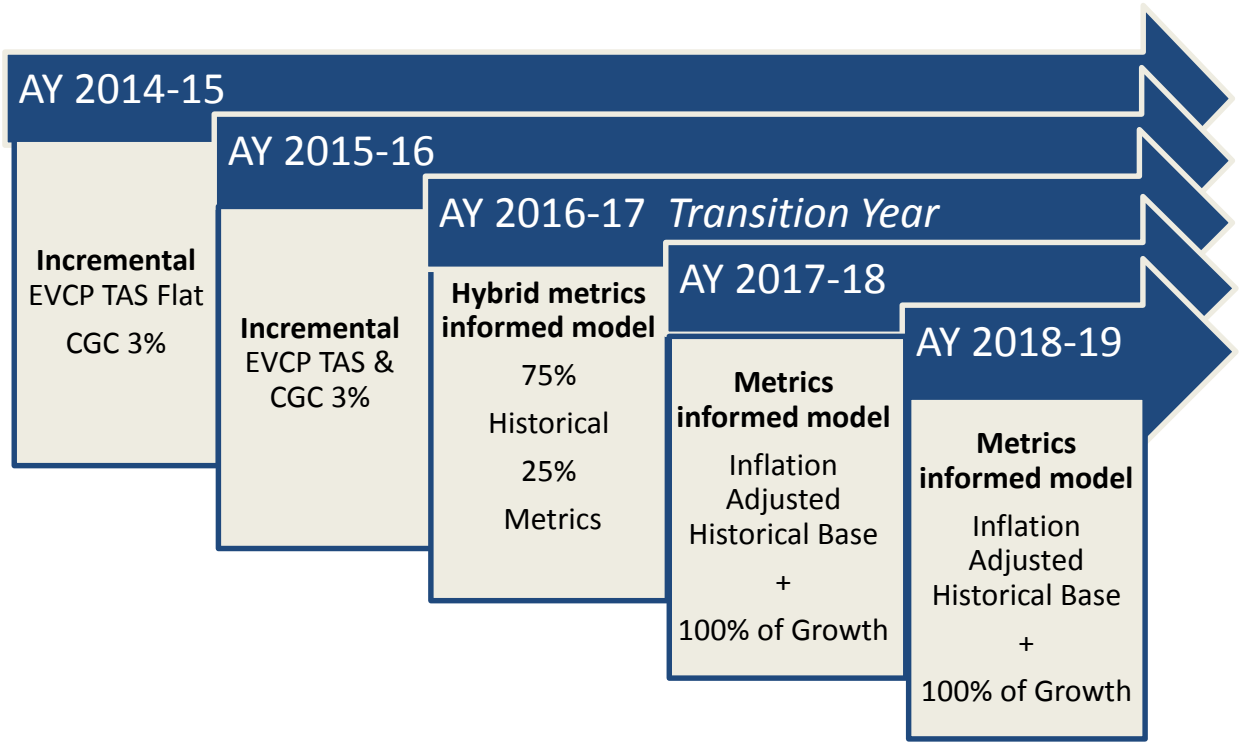
History of the EVCP TAS allocation

- 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



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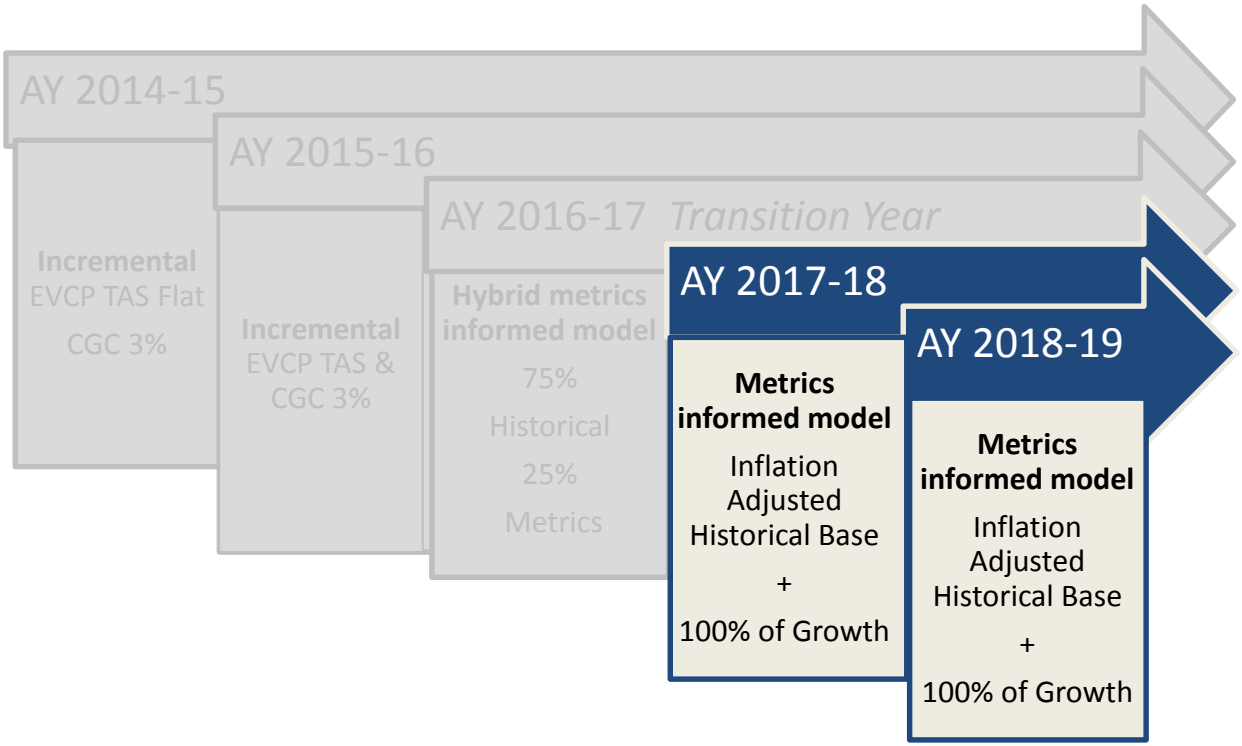
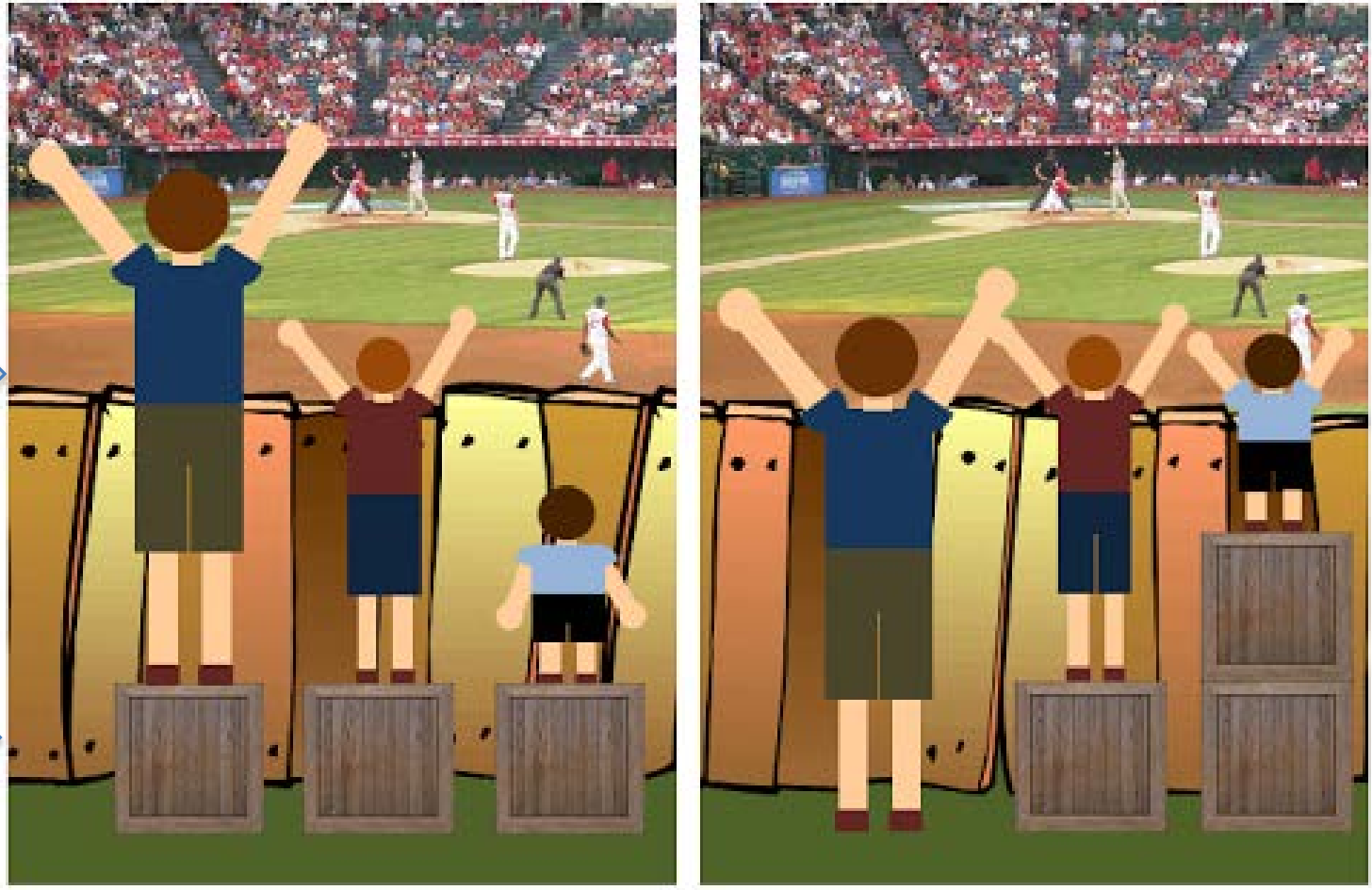


Current Process: 2018-19 TAS principles

- **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



Outcome

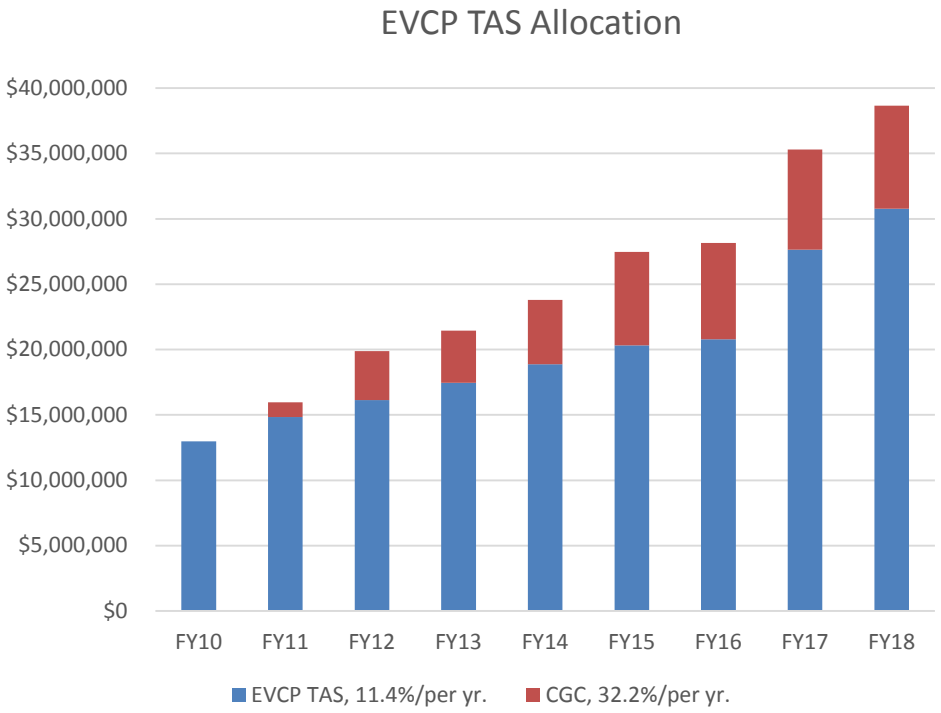
Constant Growth

Outcome

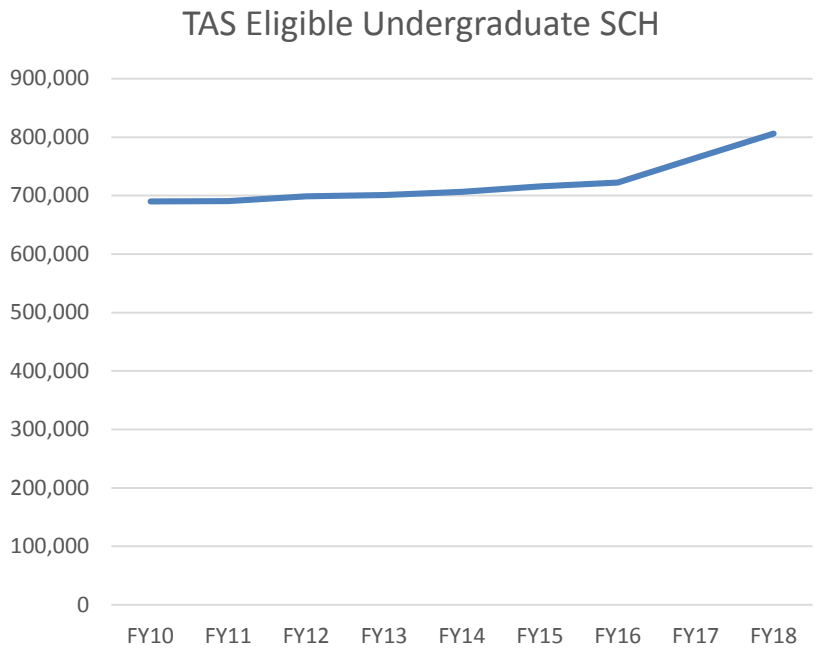
Metrics Informed

Base Funding

Berkeley has been investing in instruction

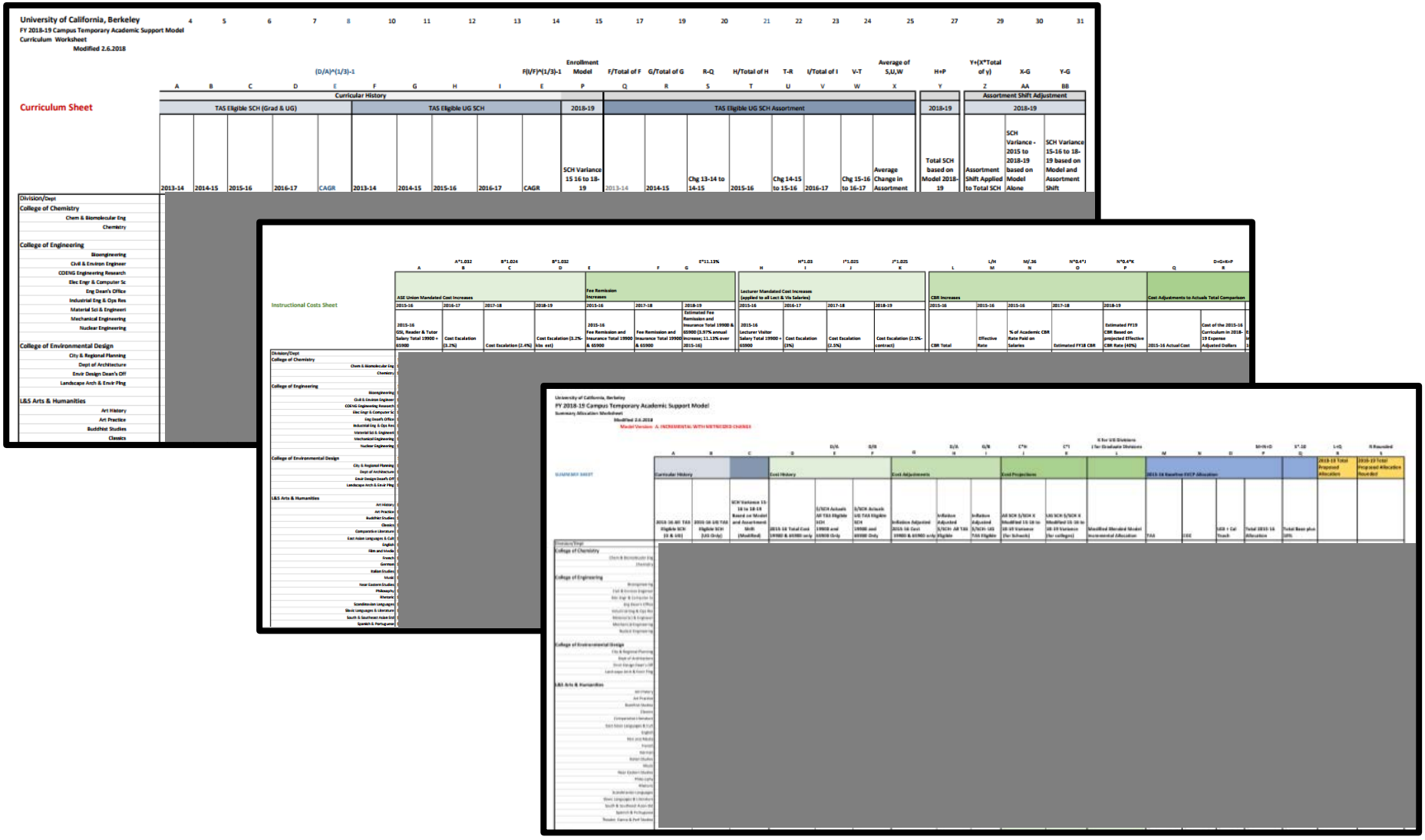


FY 10 to FY 18
growth 198%



FY 10 to FY 18
growth 17%

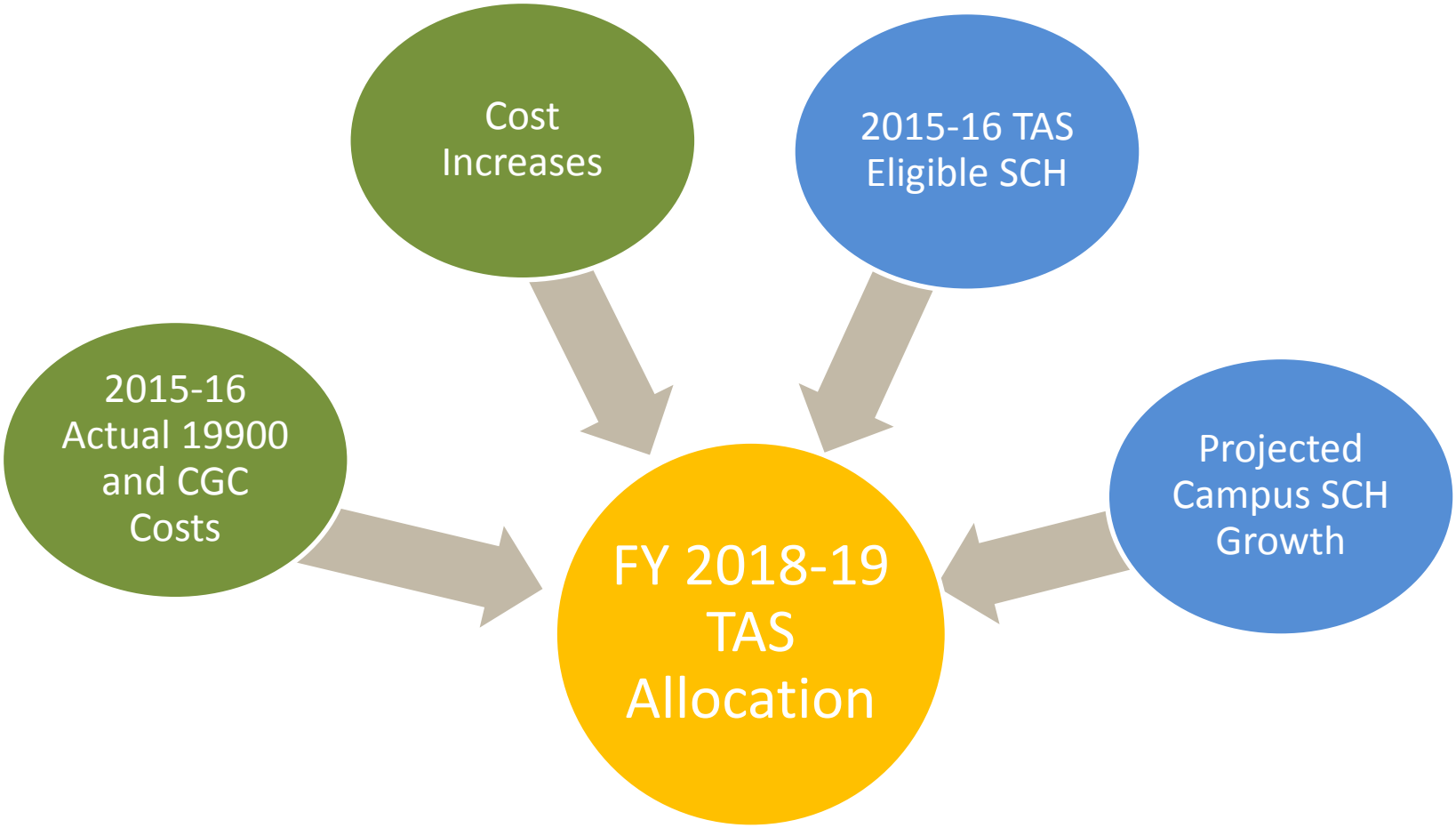
We built a multi-dimensional model



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



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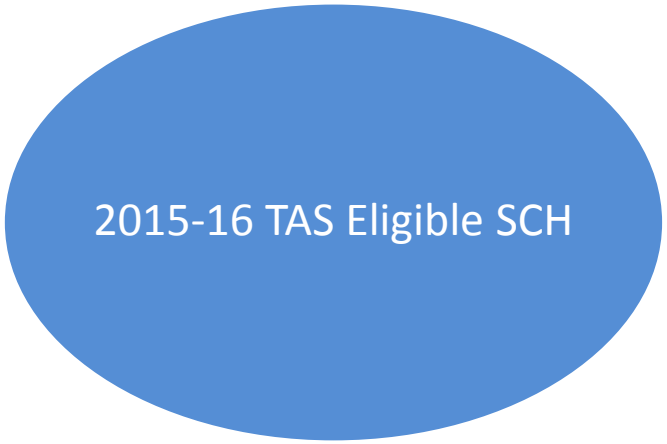


- Students Credit hours by credited department.
- For Colleges includes upper and lower division primary courses. For Schools also includes graduate level primary SCH.
- Excludes Concurrent Enrollment and Self Supporting SCH and all SCH generated by courses not typically paid for by TAS funding at the 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

Actual TAS Eligible SCH

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.

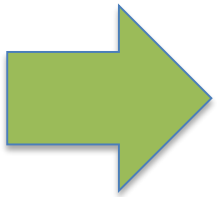
Instructional cost component

What would it cost to teach those same students today?

2015-16 Baseline Data

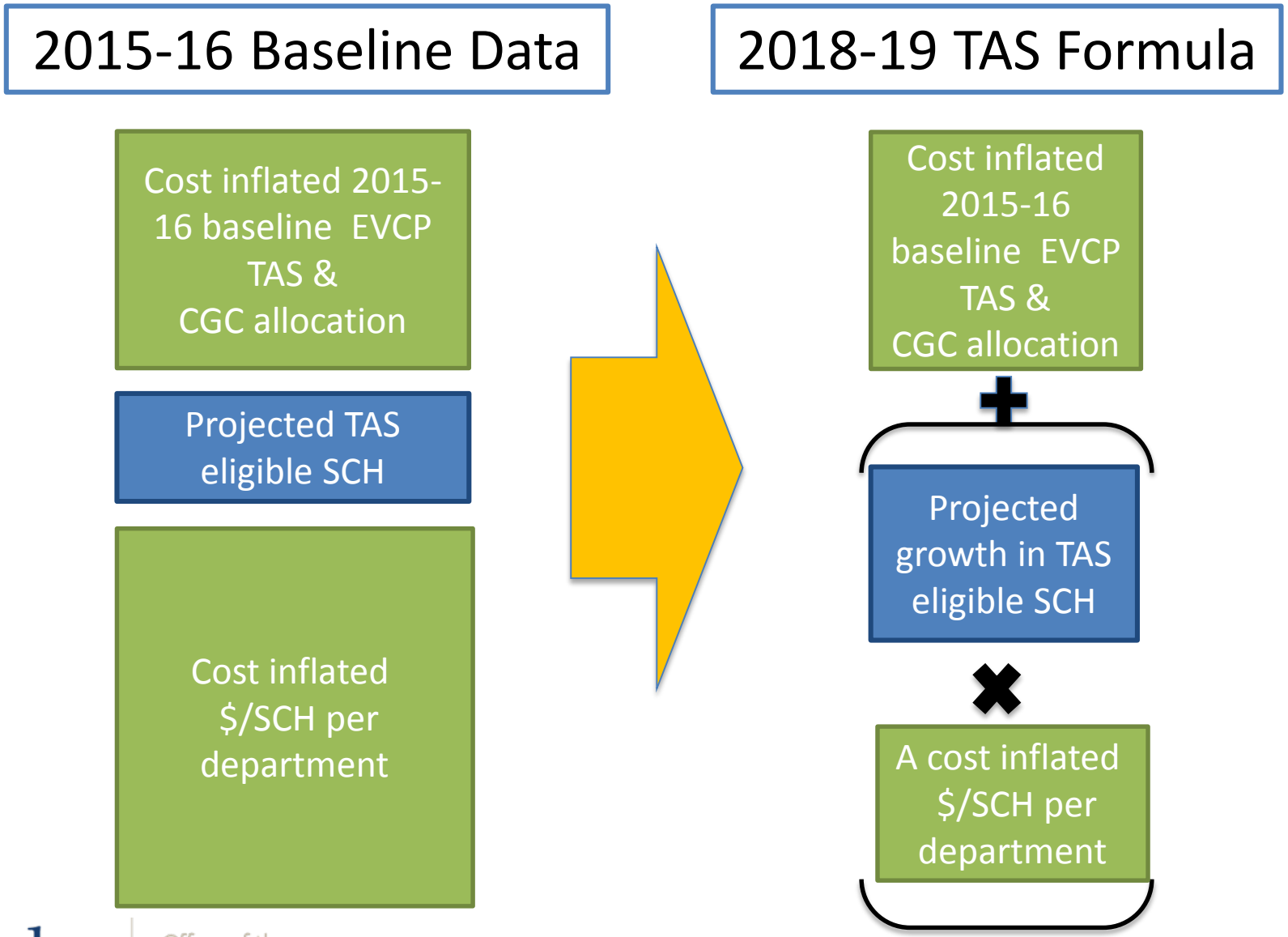
2018-19 Projected Data

Total actual spend on TAS title codes (campus funds)



- Union mandated wage increases
- Remittable fee increases
- CBR increases

Final model formula



Future vision

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

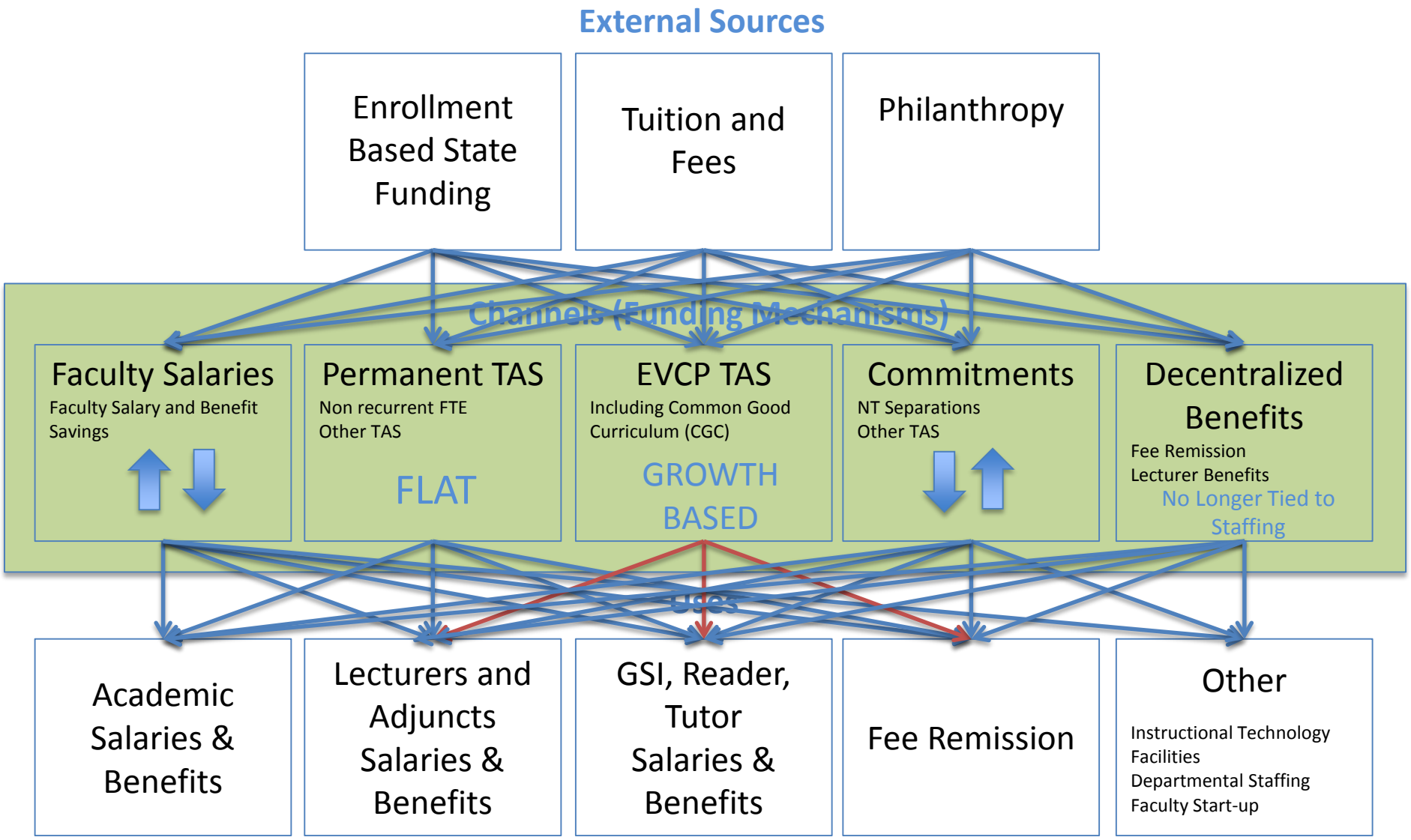
Metrics informed model
Inflation Adjusted Historical Base
+
100% of Growth

The Future

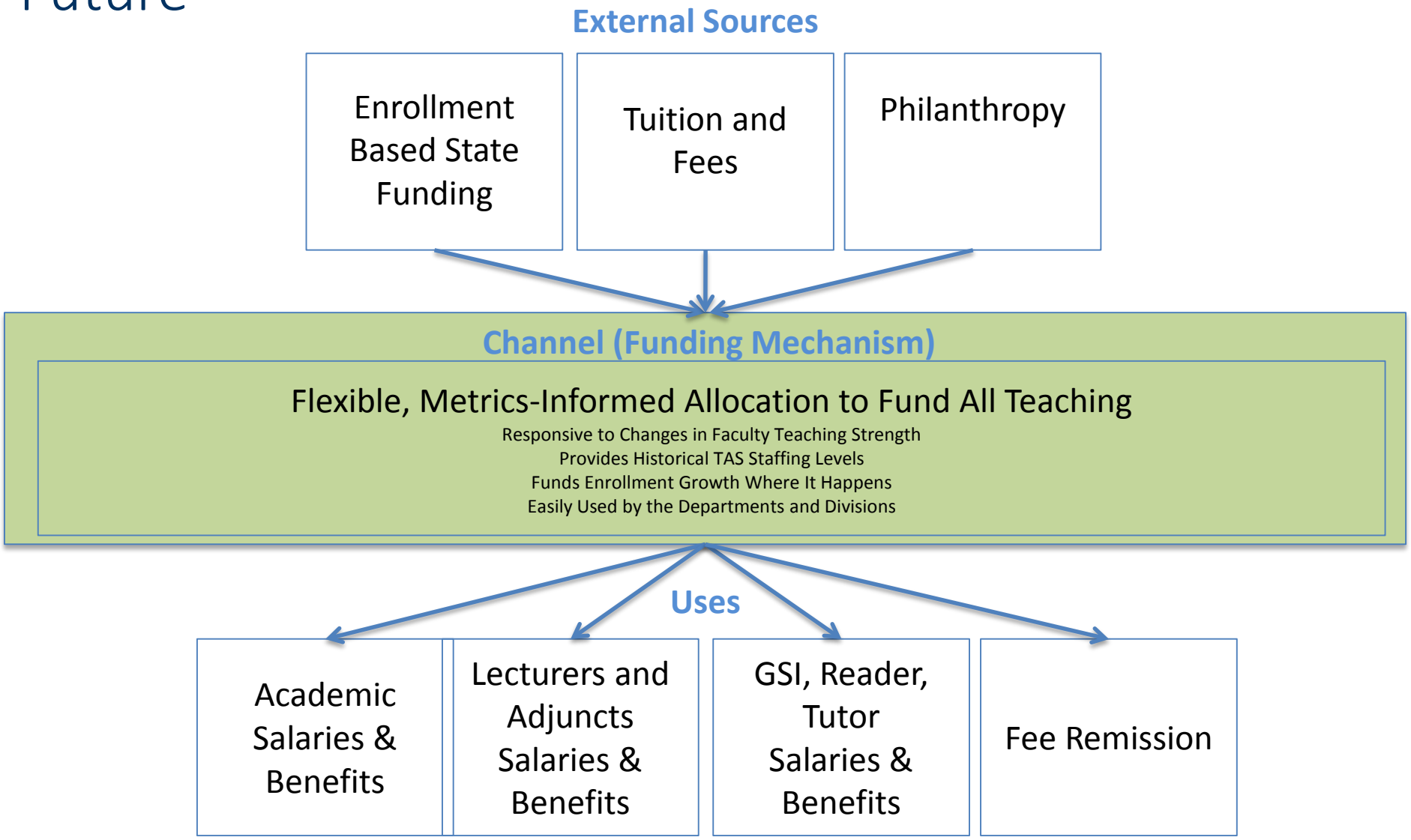
Future – Comprehensive model

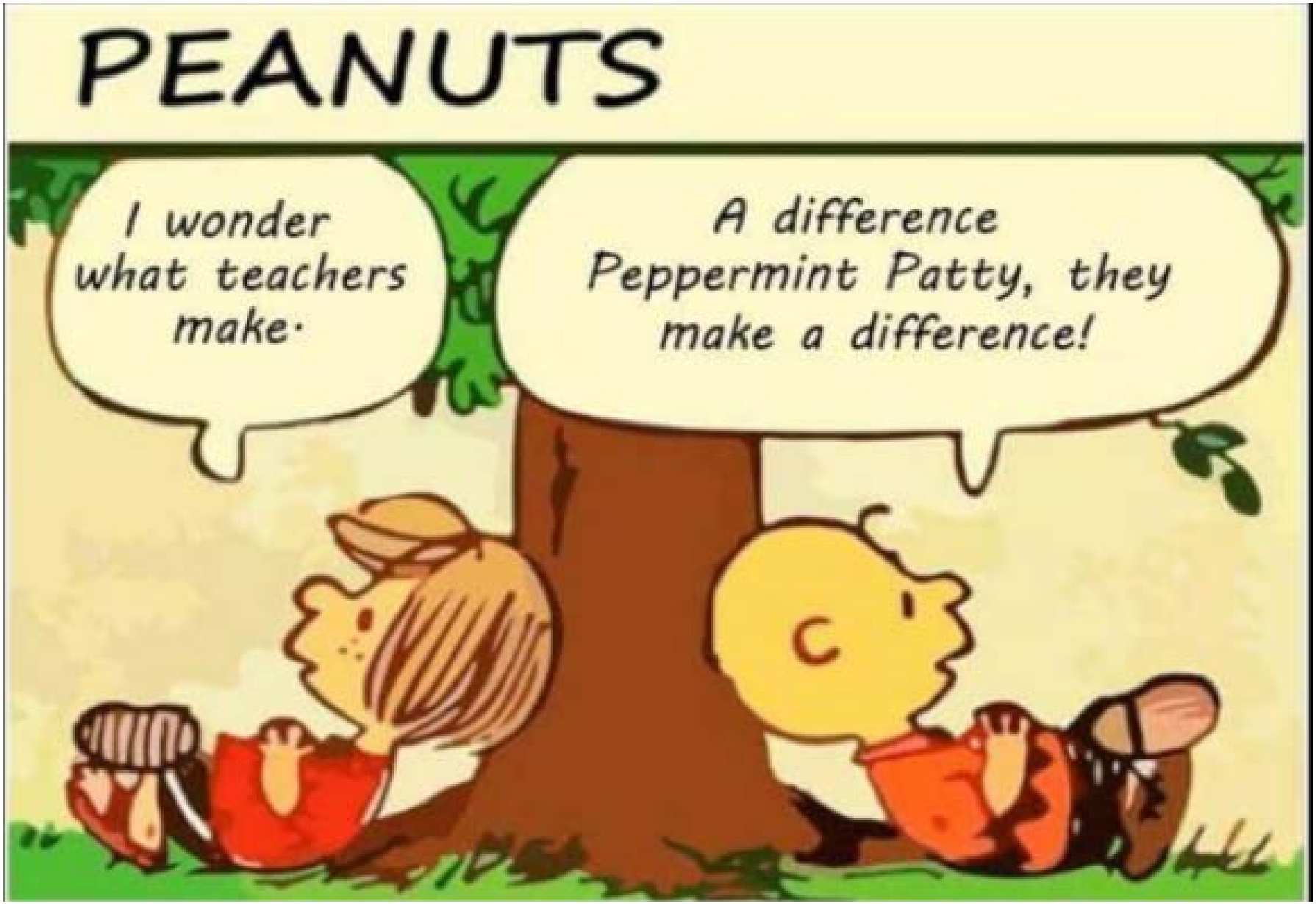
- The current model is a step in the right direction, but it only focuses on the EVCP TAS allocation, doesn't address the complexity of the various TAS funding mechanisms and doesn't address the inequities within the base allocation.

- 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


External Sources
Enrollment Based State Funding
Tuition and Fees
Philanthropy
Channels (Funding Mechanisms)
Faculty Salaries
Faculty Salary and Benefit Savings
Permanent TAS
Non recurrent FTE
Other TAS
FLAT
EVCP TAS
Including Common Good Curriculum (CGC)
GROWTH BASED
Commitments
NT Separations
Other TAS
Decentralized Benefits
Fee Remission
Lecturer Benefits
No Longer Tied to Staffing
Uses
Academic Salaries & Benefits
Lecturers and Adjuncts Salaries & Benefits
GSI, Reader, Tutor Salaries & Benefits
Fee Remission
Other
Instructional Technology
Facilities
Departmental Staffing
Faculty Start-up

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


PEANUTS
I wonder what teachers make.
A difference Peppermint Patty, they make a difference!

Thank You! And…
GO BEARS!

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