

BUDGET REBALANCING UPDATE

RECOMMENDATION	ACTION AS OF 8-28-2015	TIMELINE for COMPLETION
<p>Organizational Appraisal Committee Recommendations of the committee were presented to UPRAC. The four school model for the College of Arts and Sciences will not be implemented. Proposals for distribution of Facilities & Administrative cost (overhead for grants and contracts), Cadec Conservatory, and STEM Education are addressed in other sections of this communication. Other areas requiring further study noted by this committee will be forwarded to the Institutional Assessment and Effectiveness Committee for evaluation and provided to the Provost and Executive Vice Chancellor for Finance for disposition.</p>	<p>Items have been appropriately routed. Many of items have been forwarded to the Institutional Assessment and Effectiveness Committee.</p>	<p>Ongoing and recommendations will be reported out for necessary approvals.</p>
<p>Information Technology Committee BerryDunn consultants will be engaged to review our IT operations and provide advice regarding future directions and organizational structure. The report will be submitted to the Provost and Executive Vice Chancellor for Finance who will assemble an appropriate review and implementation team.</p>	<p>BerryDunn has completed the on-site data gathering phase and will provide a written draft report by late August 2015. Implementation remaining to be done.</p>	<p>Completion of consultant phase Sept. 2015</p>
<p>Vice Chancellor and Director of Athletics Plans for reducing the Athletics Department budget that were presented to UPRAC are approved as presented. Total rebalancing = \$587,088.</p>	<p>All plans implemented. 100% of rebalancing met.</p>	

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<p>Executive Vice Chancellor for FOIT Plans for rebalancing the Division of FOIT were presented and approved by UPRAC. Total rebalancing = \$547,294 Institutional plan presented and approved by UPRAC. Total rebalancing = \$622,551.</p>	<p>All plans implemented. FOIT met 100% of rebalancing. Institutional met 66% of rebalancing.</p>	
<p>Vice Chancellor for Student Development Student Development plan presented and approved by UPRAC. Total rebalancing = \$107,273.</p>	<p>100% of rebalancing met.</p>	
<p>Communications and Marketing Plan presented and approved by UPRAC. Total rebalancing = \$46,903..</p>	<p>100% of rebalancing met.</p>	
<p>Senior Vice Chancellor for Academic Affairs Plan presented and approved by UPRAC. Total rebalancing = \$982,878.</p>	<p>38% of rebalancing met.</p>	
<p>Chancellor Plan presented and approved by UPRAC. Total rebalancing = \$54,352.</p>	<p>100% of rebalancing met.</p>	
<p>Career Center and Internship Office The Vice Chancellor for Student Development and Provost will start with the current plan and work with appropriate individuals to get a plan in place with a budget and timeline for implementation.</p>	<p>A planning group will be selected with representatives from various departments and colleges.</p>	<p>A report and recommendations will be submitted regarding all of these topics by December 2015..</p>

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<p>Student Health Services The Vice Chancellor for Student Development will request that a comprehensive study be conducted to determine the most appropriate health services plan for our campus.</p>	<p>A campus committee (SD, Athletics, Nursing, Business Office, HR and Students) is reviewing a plan for a comprehensive Campus Health Services model.</p>	<p>A report and recommendations will be submitted regarding this topics by December 2015.</p>
<p>Merging of the departments of Criminal Justice and Sociology, Anthropology and Geography These two departments have been in discussions regarding a potential merger for approximately six to seven months. The groundwork has been laid for this transition. The Provost will work with the department head of SAG, the interim department head of Criminal Justice and CAS dean to develop a plan and timeline for the transition. Some of the issues to be addressed include:</p> <ul style="list-style-type: none"> • Involvement of faculty and staff in the process • Budget • Space and location • Choosing of a department head • Joint departmental bylaws 	<p>An implementation plan has been approved: http://www.utc.edu/budget-rebalancing/pdfs/cj-sag-merger-plan.pdf. Transition is on schedule.</p>	<p>Complete during the 2015/16 academic year. Plan is on schedule.</p>

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<p>Merging the administrative structures of the departments of Philosophy & Religion, and Modern and Classical Languages and Literatures</p> <p>The department heads and the dean of CAS provided an alternate recommendation to the original recommendation that was endorsed by UPRAC. The alternate recommendation was accepted by UPRAC and is approved for implementation. The Provost will work with the department head of MCLL, the department head of Philosophy & Religion and CAS dean to develop a plan and timeline for the transition.</p> <p>Some of the issues to be addressed include:</p> <ul style="list-style-type: none"> • Involvement of faculty and staff in the process • Budget • Space and location • Operational issues involving promotion, tenure, reappointment, EDOs and future blending of bylaws 	<p>An implementation plan has been approved: http://www.utc.edu/budget-rebalancing/pdfs/mcll-and-pr-transition-plan.pdf. Transition is on schedule.</p>	<p>Complete during the 2015/16 academic year. Plan is on schedule.</p>
<p>Move the Bachelor of Integrated Studies to the CHEPS School of Professional Studies</p> <p>The Director of the BIS was consulted regarding this recommendation and was supportive of the realignment. The Provost will work with the Director of Integrated Studies Major, and the deans of CHEPS and CAS to develop a plan and timeline for the transition.</p> <p>Some of the issues to be addressed include:</p> <ul style="list-style-type: none"> • Budget • Operational issues, e.g., review of student BIS degree plans • Space and location 	<p>Budget and location transition have been completed. Other operational issues are being addressed.</p>	<p>Complete during the 2015/16 academic year. Plan is on schedule for completion during fall 2015 semester.</p>

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<p>Move the Department of Economics to the College of Business This realignment should enhance the major and provide increased opportunities for students. The Provost will work with the deans of the COB and CAS, the interim department head and Economics faculty to ensure a smooth transition.</p> <p>Some of the issues to be addressed include:</p> <ul style="list-style-type: none"> • Involving faculty and staff in the process • New catalog wording • Differential tuition • Integration of Finance and Economics into a single department with unified Bylaws • Space and location • Budget 	<p>Discussions have been initiated. The budget has been transferred and differential tuition has been approved by the BOT. Faculty offices will be moved in January 2016. Others items are being addressed. Transition is on schedule.</p>	<p>Complete during the 2015/16 academic year. Plan is on schedule.</p>
<p>Evaluate the need of the Interdisciplinary and Nuclear Concentrations in Engineering Discussions with industry groups, such as TVA, will be planned to gather input regarding the need for the interdisciplinary and nuclear concentrations.</p>	<p>Discussions have occurred and input gathered. The nuclear option will be terminated effective fall 2015 and a phase out plan will be developed. Students the pipeline will be allowed to complete the nuclear option. Interdisciplinary engineering will continue to be evaluated.</p>	<p>Ongoing</p>

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<p>Physics, Geology and Astronomy Department realignment</p> <p>The disciplines in the current department are important to the academic offering of the university. We must take the necessary steps to protect and strengthen these disciplines. Any savings would reduce the cost to produce majors and would be viewed very favorably by campus, the System and the UT Board of Trustees. The realignment would include moving Astronomy and Physics to Chemistry and Geology to Biology and Environmental Sciences. The Provost will work with the department heads of Chemistry and Biological and Environmental Sciences and the CAS dean to ensure a smooth transition.</p> <p>Some of the issues to be addressed include:</p> <ul style="list-style-type: none"> • Involvement of faculty and staff in the process • Budget • Ways to increase majors, especially in Physics • Space and location of Geology faculty in Biological and Environmental Sciences • Review of departmental bylaws • Appropriate names for the merged departments 	<p>Geology has been merged with the Biological and Environmental Sciences Department. An implementation plan has been approved: http://www.utc.edu/budget-rebalancing/pdfs/bio-esc-geol-merger-plan.pdf. Transition is on schedule.</p> <p>Physics and Astronomy have been merged with the Chemistry Department. An implementation plan has been approved: http://www.utc.edu/budget-rebalancing/pdfs/chemistry-physics-link-plan-revised.pdf. Transition is on schedule.</p>	<p>Transition completed by September 2015. The transitions have been completed. Work on combining bylaws will be completed in fall 2015.</p>

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<p>Moving the administrative oversight of STEM from the College of Arts and Sciences to the College of Health, Education and Professional Studies</p> <p>It is essential that UTC maintain a strong focus in STEM and the training of teachers in STEM. With that in mind we must position our STEM teachers' preparation program to produce outstanding graduates in an efficient and effective manner. The transition of the STEM teachers' program to CHEPS will save money and minimize overhead. Administrative functions and communication lines for interacting with Hamilton County Schools for field placement are in place and acknowledged by external partners. This proposal should move forward while maintaining the strengths of the current program. This proposal is approved and will require the development of an implementation plan. Transfer of administrative oversight for STEM will be effective July 1, 2015.</p> <p>The provost will charge a committee to develop a plan to implement this change that maintains quality, serves students, and addresses concerns. Some of the issues to be addressed include:</p> <ul style="list-style-type: none"> • The role of mentor teachers • The early classroom experiences • Inventory and transfer of materials • Evaluate if curricular changes are needed • Should students in the STEM Education program major in a discipline (Math Education) and take classes for the credential and teaching experience? 	<p>New assignments have been made and the transition to CHEPS is well underway. A task force has been appointed and a plan has been approved: (link to plan on website). Transition is on schedule.</p>	<p>Complete transition by the end of FY16</p>

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<p>School of Professional Studies Professional programs in the College of Health, Education and Professional Studies will be grouped as a school. This will allow for better advertising and recruiting of students. Efficiencies will be gained through elimination of duplicate administrative efforts.</p>	A plan has been drafted and is being implemented. (link to plan on website)	Transition to be completed by May 2016.
<p>School of Health Professions The department heads for Nursing, Physical Therapy, Occupational Therapy, and HHP should consider how they might organize themselves collectively so better promote the health profession majors at UTC.</p>	Discussions are ongoing.	Recommendation by December 2015.
<p>Combination of Music and Theatre programs We must have a thriving arts community on our campus. Seeking means to advance and enhance our arts programs and create a stronger connection to the Chattanooga community is an essential goal of our university. Having a School of Performing Arts or School of Fine and Performing Arts provides UTC with unique advantages in recruiting students, faculty and donors. A potential integration of these programs could provide a more unified focus in the arts, to include Cadek and the Southeastern Center for Education in the Arts.</p> <p>The Provost will work with the department heads of Music, Theater and Speech, and Art to develop a plan, structure, budget, and partnerships for a School in the Arts or a School in Performing Arts. Understanding the structure, community relationships and possible partnerships, will benefit all three departments.</p> <p>Some of the issues to be considered include:</p> <ul style="list-style-type: none"> • Involving faculty and staff in the process 	The department heads of Art, Music, and Theatre developed a plan to study the feasibility of forming a School of Fine and Performing Arts. Financial support was provided by the Provost to allow the department heads to travel to universities with a School for Fine and Performing Arts for data gathering. Control of the Patten Series has been transferred to the College of Arts and Sciences. Staff and the Fine Arts facility control has been transferred to Steve Ray (Theatre department	Study to determine how to best combine these areas will be completed work before December 31, 2015.

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<ul style="list-style-type: none"> • Can Art be included in the School? Should it be a School of Fine Arts? • Does the Southeast Center for Education in the Arts become a unit in the School? • Is there a fund raising advantage to having a School of Fine Arts vs a School of Performing Arts? • Does a School of Fine Arts leverage community resources to continue support for less financially viable operations, such as the orchestra. • What relationship would Cadek Conservatory have with a School of Fine Arts? • How is the School operationalized, to include budget, leadership, etc.? 	<p>head). An ad hoc fundraising committee has been established to identify short-term and long-term financial support for the Patten Series.</p>	
<p>Cadec Music Conservatory Cadec is challenged to meet its budget primarily due to its income obligation. A thorough evaluation and analysis of Cadec operations is needed. The Provost will appoint a taskforce to review the operation and viability of Cadec. Some of the issues to be considered include:</p> <ul style="list-style-type: none"> • Budget – is Cadec recovering all costs, if not, how much is the university subsidizing Cadec and is there an acceptable subsidy amount? • Where should Cadec report? • Is there a way to involve Music Department faculty and/or students in Cadec that would reduce operational costs? • Renovations of the concert hall were done with the gifts from the community and this must be considered. 	<p>Dr. Lee Harris will lead this effort. The first order of business was to identify and gain approval for an interim Coordinator, which has been accomplished. The review committee will consist of interested parents, community members and Cadec faculty. No date has been set for the first meeting. A major portion of the income obligation has been eliminated by apply a faculty salary to the obligation.</p>	<p>A final report is expected by January 2016</p>

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<p>Facilities & Administrative Cost (overhead) Distribution F&A distribution must be reviewed to ensure we maximize the impact and leverage its use to generate more external funding through grants and contracts. The Provost and Executive Vice Chancellor for Finance will work with key constituents to develop an acceptable distribution model for grant and contract F&A. The original proposal from the Office of Partnerships and Sponsored Programs and revised proposal from the Organizational Appraisal Committee should be examined and the impacts determined. A final recommendation for F&A distribution should be the end product of the discussions.</p>	<p>Four department heads (Pam Ashmore, Ahmed Eltom, Chris Smith, & John Tucker) reviewed the proposal and provided recommended changes. The plan was approved by Chancellor Angle and implemented July 1, 2015.</p>	<p>By the end of September 2015. (This item has been completed.)</p>
<p>Online and Summer Session Budgets We must ensure that online and summer sessions have adequate budgets and incentives so department heads can be creative and generate revenue. The Provost and Executive Vice Chancellor for Finance will work with deans, department heads, and faculty to ensure people understand the current funding formula and recommend any necessary changes to ensure sustainability.</p>	<p>The revenue sharing plan for online has been modified so departments now receive 42% of the revenue coming to AA, an increase of 21%</p> <p>Data and budget information for summer school is being gathered for the basis of discussions with department heads and deans.</p>	<p>By the end of September 2015.</p> <p>Online budgetary issues have been addressed and implemented.</p> <p>Any changes to summer school budgeting process completed by December 2015</p>

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<p>WUTC Background: WUTC had a \$1M surplus that has decreased over the past several years. The surplus will likely run out in FY 2016 and UTC will need to add \$150,000 to base budget (annual cost) beginning in FY 2017. UTC will then be providing \$500,000 direct cash support and \$150,000 - \$175,000 in soft costs for WUTC assuming no changes to the operational costs, underwriting, or fundraising. This is unsustainable given the return on investment for students and the UTC academic enterprise. The question is how to retain a NPR radio station in Chattanooga and not have UTC subsidize such a huge portion of the costs. A taskforce will be appointed to review operations and provide recommendations for realigning operational expenditures. The taskforce will explore alliances, affiliations, and possible merger with WCTI, the local PBS station.</p>	<p>A task force has been appointed. Members are Bryan Rowland (chair), Betsy Alderman, Chuck Cantrell, Paul Clark, Tyler Forest, and Michael Friedman. The task force is meeting and will submit a report with recommendations to Chancellor Angle.</p>	<p>Report expected by December 31, 2015.</p>