

FY2022 Operational Review Committee Final Report

Unit Reviewed: Strategic Enrollment
Date: April 2022

Unit Presentation Requirements

The following items are required materials for the unit presentations. The units presented to the committee and questions were encouraged. The units provided additional or supplemental information as deemed appropriate.

- General Information to “Tell Your Story”
 - How unit aligns to University goals
- Organizational Chart and Position / Staffing Information
- Opportunities and Strengths
- What is going well? What requires improvement?
- Key Performance Indicators, Benchmarks, and Surveys
- Five Year Financial Pro-forma
- Reserves and Balances

Goals and Initiatives

- Strategic Enrollment’s overarching goal is very clear: their ultimate “North Star” is to grow enrollment at UTSA. This is also one of UTSA's primary institutional KPIs.
- Beyond increasing enrollment, their key goals and initiatives include:
 - Collaborations with academic colleges, Student Success, and Student Affairs to support student success through retention and graduation;
 - Ensuring work study program is tied to marketable skills in industry;
 - Working with Provost and VPBA to grow head count and semester credit hours;
 - Promoting access through financial resources (scholarships, financial aid, etc.);
 - Focusing on operational excellence through a process of continuous improvement that emphasizes effectiveness and efficiency (speed, excellence, service) and maximizing resources.
- The presentation included recent examples of how Strategic Enrollment is meeting their goals, including highest freshman enrollment in fall 2021, record awarded degrees, and increases in student funding.
- The presentation was clear in highlighting how the unit’s staffing and resources, operational practices, and organizational structure support the unit’s goals and initiatives.

- Strategic Enrollment’s goals and initiatives are underpinned by a clearly articulated set of core values (student-centered, inclusive, integrity, ownership, and adaptability). These values align with the university's core values, but with a student-focus.
- This is a highly data-driven unit, with a clearly established set of KPIs. However, customer satisfaction and benchmarking were not addressed during the presentation. We recommend they explore internal/external customer surveys and/or current staff process improvement surveys to provide more feedback on how the department is doing from a customer perspective. Likewise, we recommend they engage in some benchmarking analysis to compare key KPIs with peer and aspirant institutions.

Organization

- The presentation from Strategic Enrollment was very enlightening not only in what their mission is but also all the services that they provide to the UTSA community. The organizational chart for this division clearly depicted the units within the division and the number of staff in each unit. Dr. Barnes did a good job presenting an overview of each units’ services.
- The information presented was well organized and gave the committee a better understanding of all that Strategic Enrollment does. While being under new leadership for roughly two and half years, this division has undergone some reorganization to remain nimble to the needs of UTSA. They have also been creative in serving a large dynamic student population while being understaffed for the last 2 years due to the Covid-19 pandemic. The division has been very successful in using technology and outsourcing to meet demands.

Operations

- Operational excellence and continuous improvement is one of the five goals of Strategic Enrollment (SE) to support the university's three strategic destinations. SE offers value-added activities to achieve student success that leads to the overarching department goal of enrollment growth.
- SE was impacted by the reduction in force in 2020 (i.e., lost 18 FTE) and continues to be challenged with staffing shortage with increasing workload and implementation of new initiatives. Therefore, opportunities to automate manual processes using technology are essential, and SE appears to be making progress in this area. The implementation of Salesforce is an example.
- There is a clear focus from leadership on improving the department culture to identify waste and encourage employees to think about efficiency in their daily work. Along with automation, this effort will help to overcome long term staffing shortages.

- There is a clear operational awareness of the value of working with internal and external organizations to achieve SE's goal of enrollment growth. SE is working toward leveraging vendor partnerships in lieu of internal development, and the department's efforts and collaborations with other departments are visible through the department's impressive 2020-2021 achievements. SE has a close alliance with Student Success and maintains quick access to other collaborating departments.
- It may be helpful for SE to conduct a student survey or focus group to understand operations through the lens of the students and better evaluate processes and improve operations accordingly.
- Surge at the beginning of each semester is one particular and recurring challenge to the operations of SE. There is an all hands-on deck approach to assist with surge, and the quality of work is impacted due to the complex subject matter and difficulty and time required to train new and temporary staff. There is more that could be done to ensure a high-quality experience for students, and SE is aware of this and plans to address it.

Finance

- In FY20, the non-personnel expenses were roughly \$3.25M. These jump to almost \$6.2 million in FY21, with \$2.9M listed as "other expense" which is explained in the comment as "operational stop" costs. It's difficult to understand how doing less during the pandemic costs so much more. After the pandemic, the non-personnel costs are projected to remain up at \$5.2M, \$5.5M, and \$5.6M in FY22 thru FY24. Given how successfully Strategic Enrollment operated prior to the pandemic, perhaps they should consider reducing non-labor back down to around \$3.3M, pre-pandemic levels. This would reduce non-personnel expenses by \$1.9M, \$2.2M, and \$2.3M in FY22-FY24, saving University funds.

Assessment

- Strategic Enrollment (SE) informed a series of challenges and approaches for meeting those challenges. Additionally, SE presented a collection of key performance indicators (KPIs). Dr. Barnes indicated that the KPIs were a sample of all the KPIs used by SE. Additionally, there are KPIs that are specific to each one of the sub-units (Enrollment Marketing, Enrollment Operations, Financial Aid & Scholarships, Undergraduate Recruitment, Veteran & Military Affairs, One Stop Enrollment, New Student Programs).
- We recommend SE identify KPIs as a function of the priorities and challenges of the operational unit. It was not clear from the presentation that the most important areas of concern have a measurable outcome that could inform ways to improve the operation. There are, conceivably, areas that do not need KPIs, and those could be identified with the rationale for the exception.

- As an example of this mapping, the table below shows the challenges, intended solutions, and how KPIs are related to those as inferred from the presentation. The mapping is likely incomplete and inaccurate, but this is simply a reflection of the room for improvement in KPIs as a function of priorities.

Challenge	Approach	KEY PERFORMANCE INDICATORS						
		Enrollment	Top Quartile	Student Debt	Funnel Mgmt	Applications	Freshman	FAFSA
Demand vs. capacity	Leverage vendor partners							
Manual processes	Information systems such as Salesforce CRM, DegreeWorks, etc.							
Rapid change	Student onboarding, course modalities, case mgmt., UTSA day							
Organizational culture	Cross training, salary adjustments, staff augmentation, etc.							

- Strategic Enrollment (SE) provided their KPIs; however, a more in-depth explanation -- and evaluation -- of the level of their success in achieving progress is needed. After all, their operation is data driven. The numbers can be presented in a clear and concise manner that could be understood by an external observer.
- It is worth noting that while all units at UTSA struggled with budget austerity and reduction in workforce, SE faced the challenge to not only maintain, but increase enrollment during a pandemic. SE successfully met that challenge. The growth was organic, and also driven by improvement in the operation. This narrative could be presented more centrally as a success story.
- SE showed some results collected by Institutional Research, which demonstrate the capability for partnering with other units at UTSA. However, there was no baseline against which to compare.
- In summary, the assessment of SE relies on metrics. SE demonstrated a strategy in place for collecting data at multiple levels. There are clearly identified KPIs, although more precision about alignment of KPIs and priorities would be desirable. A baseline for comparative performance improvement could help understand the impact of changes and transitions.



Operational Review Presentation

Lynn Barnes
Senior Vice Provost for Strategic Enrollment

Mission & Vision

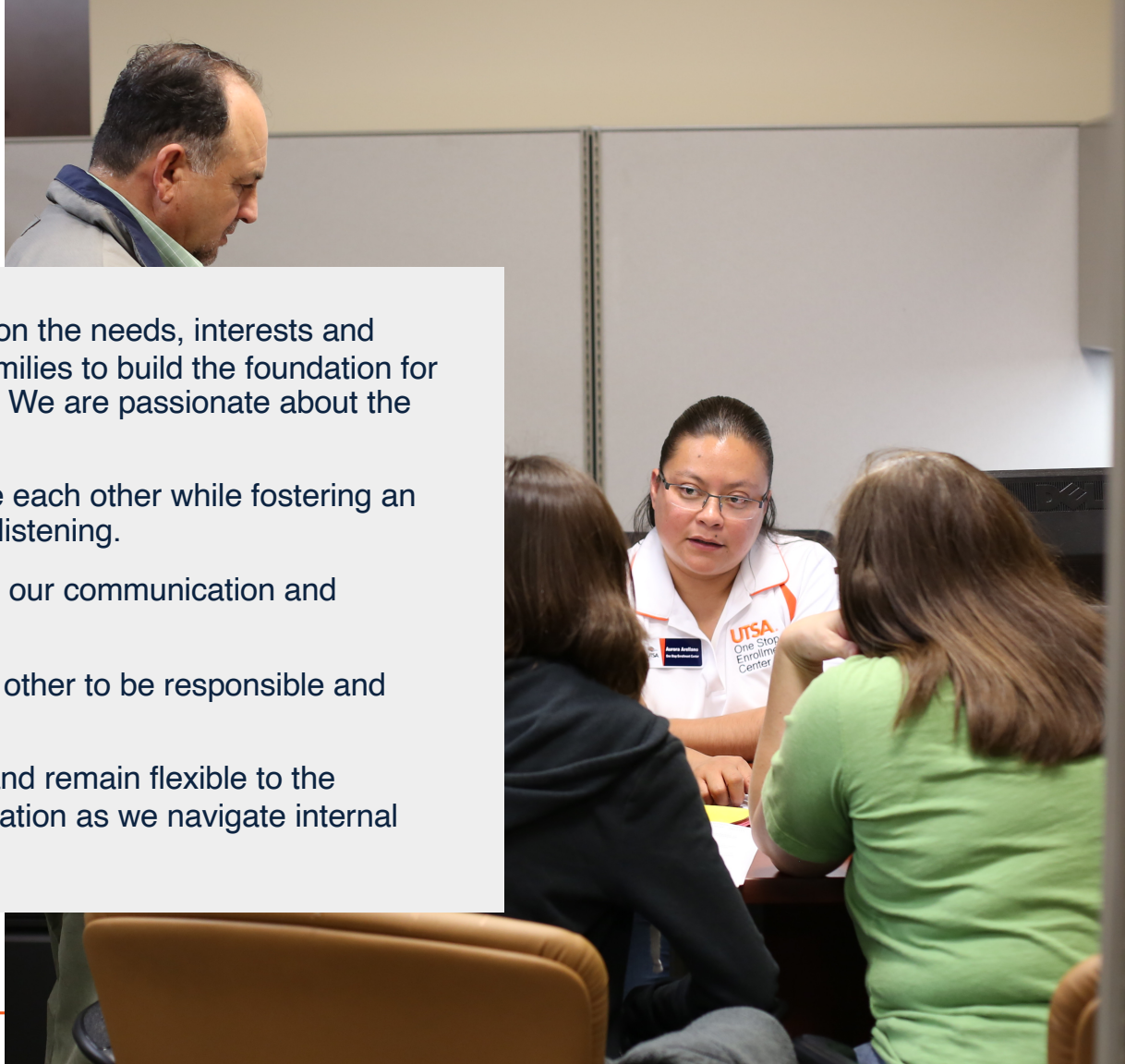
Strategic Enrollment provides a student-centered model of service and support to **attract, retain and graduate** talented and diverse students. This is achieved through collaborative partnerships, creativity and a commitment to excellence.

We seek to be a nationally-recognized leader in student-centered enrollment operations, transforming the lives of students and their families in a positive and meaningful way.



Core Values

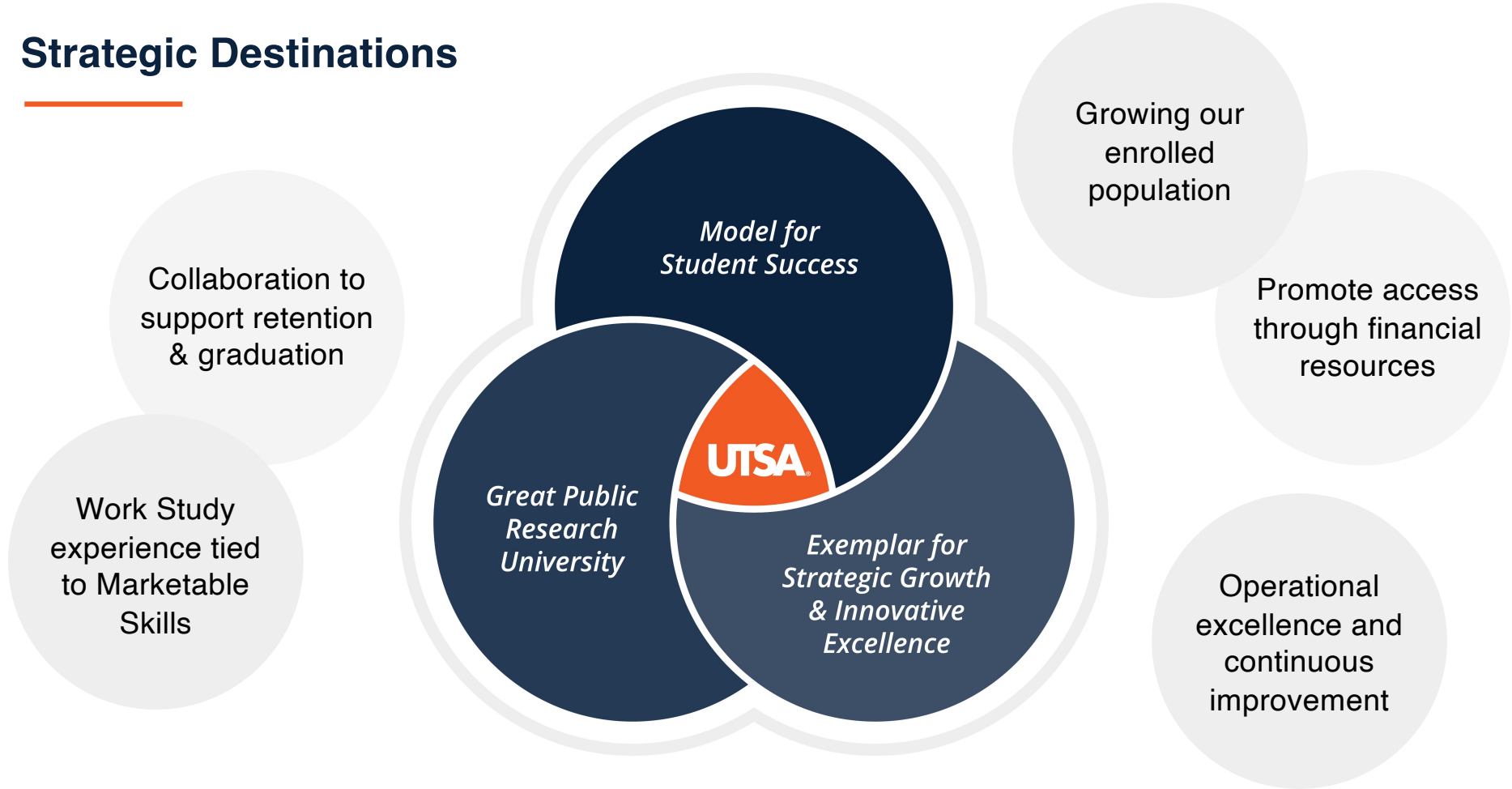
- **Student-Centered** • We focus on the needs, interests and aspirations of students and their families to build the foundation for services and programs we provide. We are passionate about the success of our students.
- **Inclusive** • We respect and value each other while fostering an environment of understanding and listening.
- **Integrity** • We are professional in our communication and transparent in our actions.
- **Ownership** • We empower each other to be responsible and take pride in our work.
- **Adaptability** • We are creative and remain flexible to the changing landscape of higher education as we navigate internal and external influences.



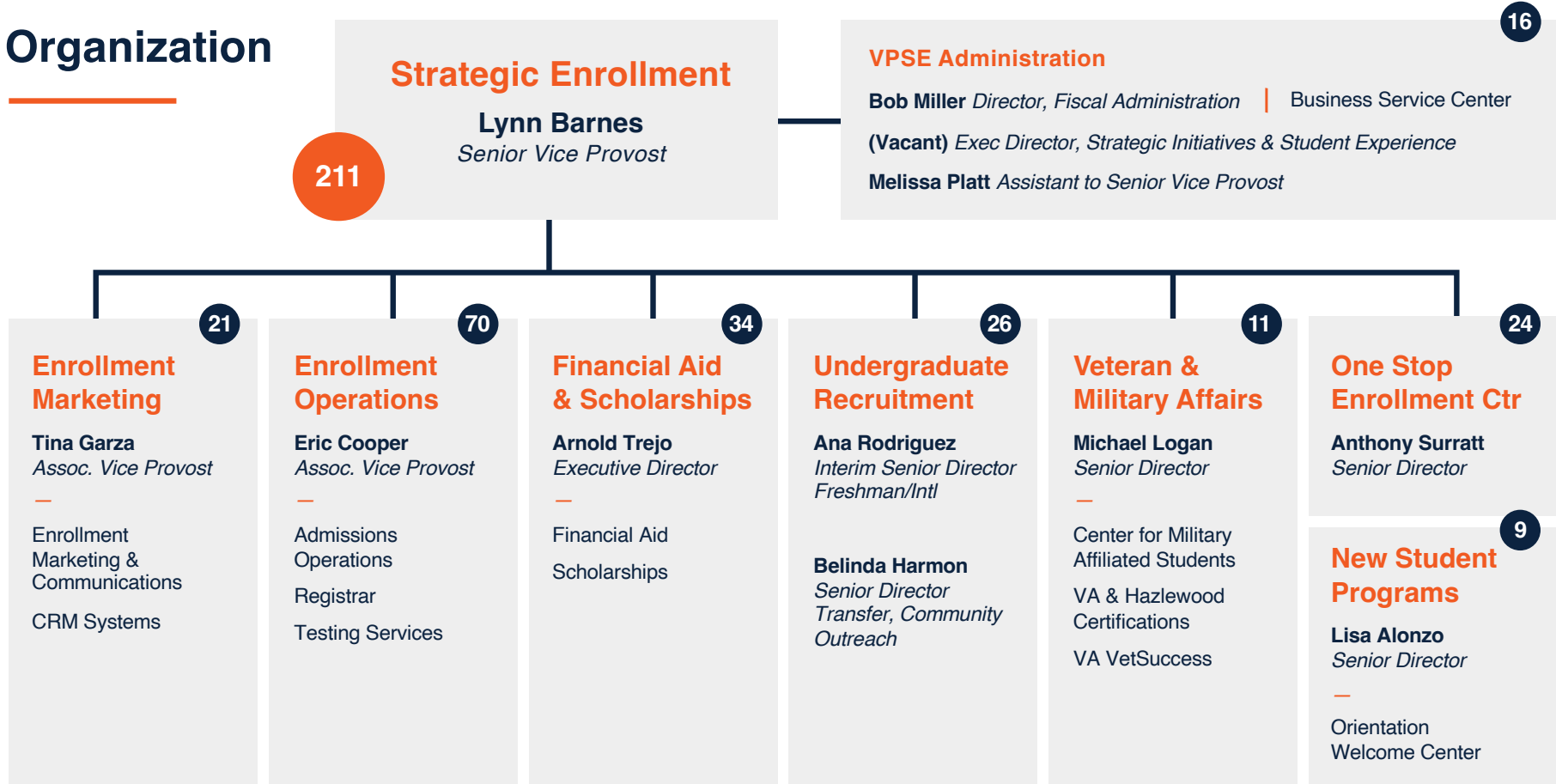


Grow Enrollment

Strategic Destinations



Organization



Challenges/Opportunities

Staffing & Resources

Demand vs Capacity
Recovery from RIF

Rapid Pace of Change

Pandemic Impacts
Ambitious Goals

Operational Practices

Manual Processes

Organizational Culture

Training
Shift in Thinking

Responses



Leverage Vendor Partners

ProEd Verification
Parchment Transcripts
Admit Packet Fulfillment
RNL

Collaboration Synergies

Student Onboarding
Course Modalities
Salesforce Case Mgmt
Scholarships
UTSA Day



Scale & Automate with Technology

Salesforce CRM
Degreeworks
CLSS, QLESS
Texting

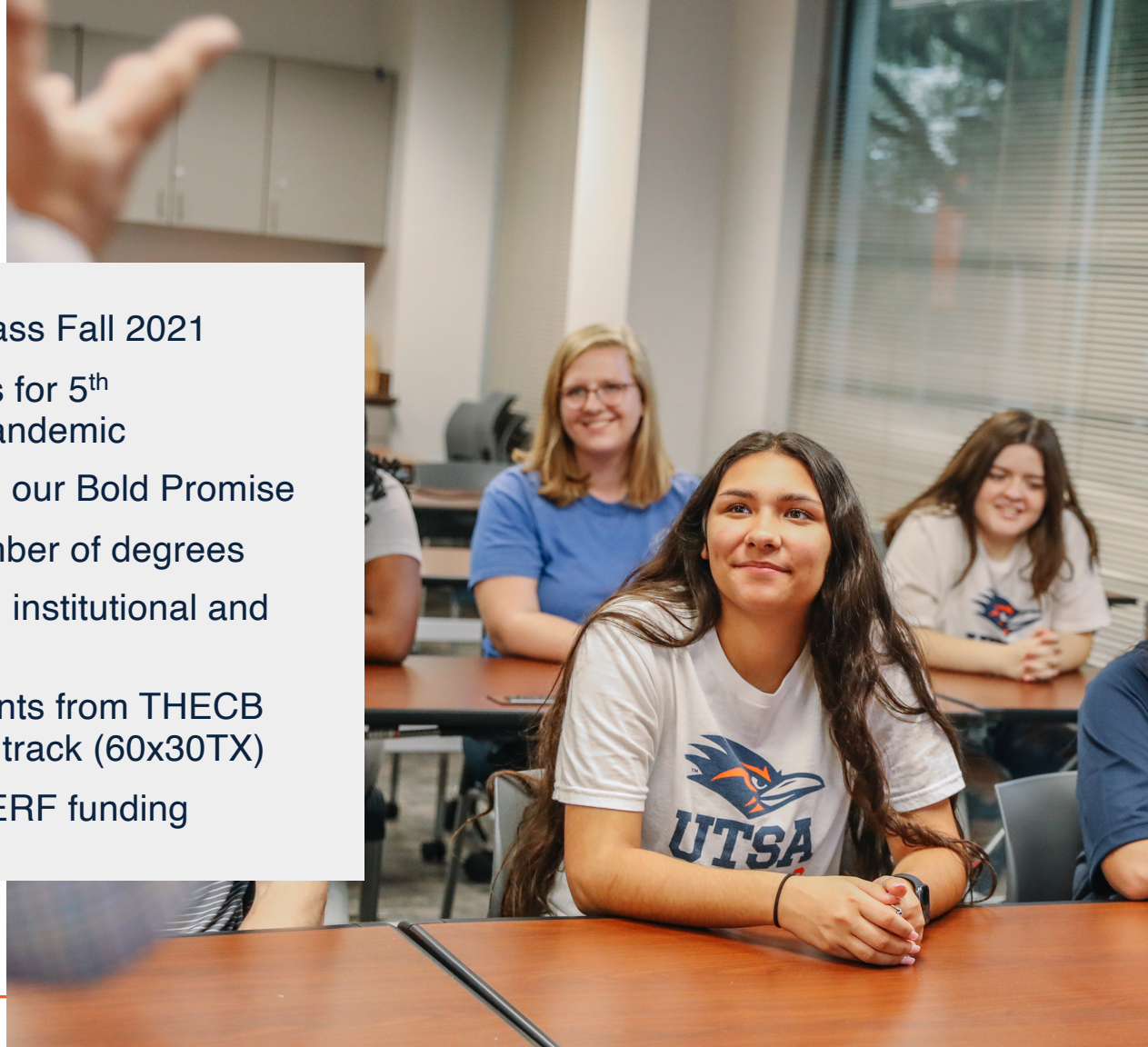
Focus on Staff

Cross-Training
Salary Adjustments
Staff Augmentation
LEAN thinking
Clifton Strengths

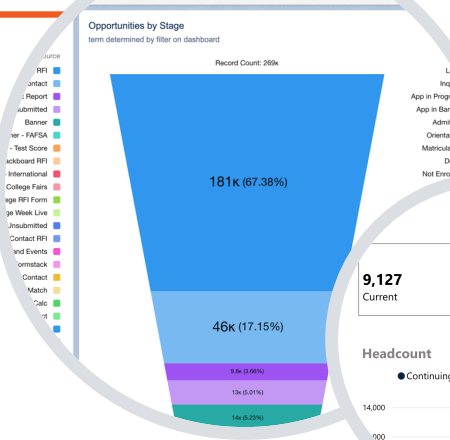


2020-2021 Achievements

- Enrolled largest freshman class Fall 2021
- Spring 2021 Enrollment rises for 5th consecutive years despite pandemic
- 1700+ enrolled students with our Bold Promise
- UTSA awarded a record number of degrees
- \$317 million of federal, state, institutional and outside aid paid to students
- UTSA received \$370K in grants from THECB to help students get back on track (60x30TX)
- Disbursed \$69 million in HEERF funding



KPIs



Applications - Total (Both Complete & Incomplete)

Year	2020	2021	2022
Admit Type	#	#Δ %Δ	# #Δ %Δ
FR	24,661	25,611 950 4%	28,345 2734 11%
FT	811	868 57 7%	787 -81 -9%
TR	2,427	2,508 81 3%	1,880 -628 -25%
RE	129	79 -50 -39%	85 6 8%
SU/PB	126	116 -10 -8%	116 0 0%
INTL	358	487 129 36%	645 158 32%
Total	28,512	29,669 1157 4%	31,858 2189 7%

Applications -

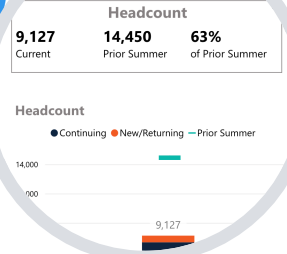
Year	2020
Admit Type	# #Δ
FR	18,481
FT	470
TR	1,565
RE	87
SU/PB	98
INTL	204
Total	20,905

Admitted

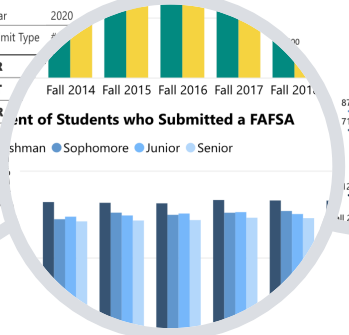
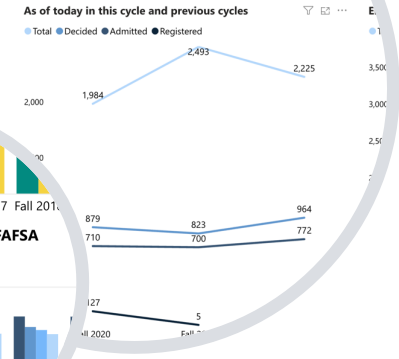
Year	2020	2021	2022
Admit Type	#	#Δ %Δ	# #Δ %Δ
FR	13,349	13,953 604 5%	15,513 1560 11%
FT	362	368 6 2%	367 -1 -0%
TR	1,367	1,179 -188 -14%	954 -225 -19%
RE	64	42 -22 -34%	52 10 24%
SU/PB	86	62 -24 -28%	64 2 3%
INTL	170	159 -11 -6%	171 12 8%
Total	15,398	15,763 365 2%	17,121 1358 9%

Denied

Year	2020
Admit Type	# #Δ
FR	16,632
FT	13
TR	1,098
RE	110
SU/PB	117
INTL	204
Total	18,174



Graduate Recruitment



Institutional

- Overall enrollment: 45,000 by 2028
 - Fall 2021: 34,734
- Freshman Class in Top Quartile: >= 50%
 - Fall 2021: 50%
- Student Debt Level: Below \$20,000
 - Current Level: \$21,200

Divisional

- Funnel Management in CRM
 - 49% increase Fall 21 vs Fall 22
- Applications: Submitted, Completed, Admitted, Yield
- Freshman, Transfer and Graduate Enrollment
- FAFSA Submission

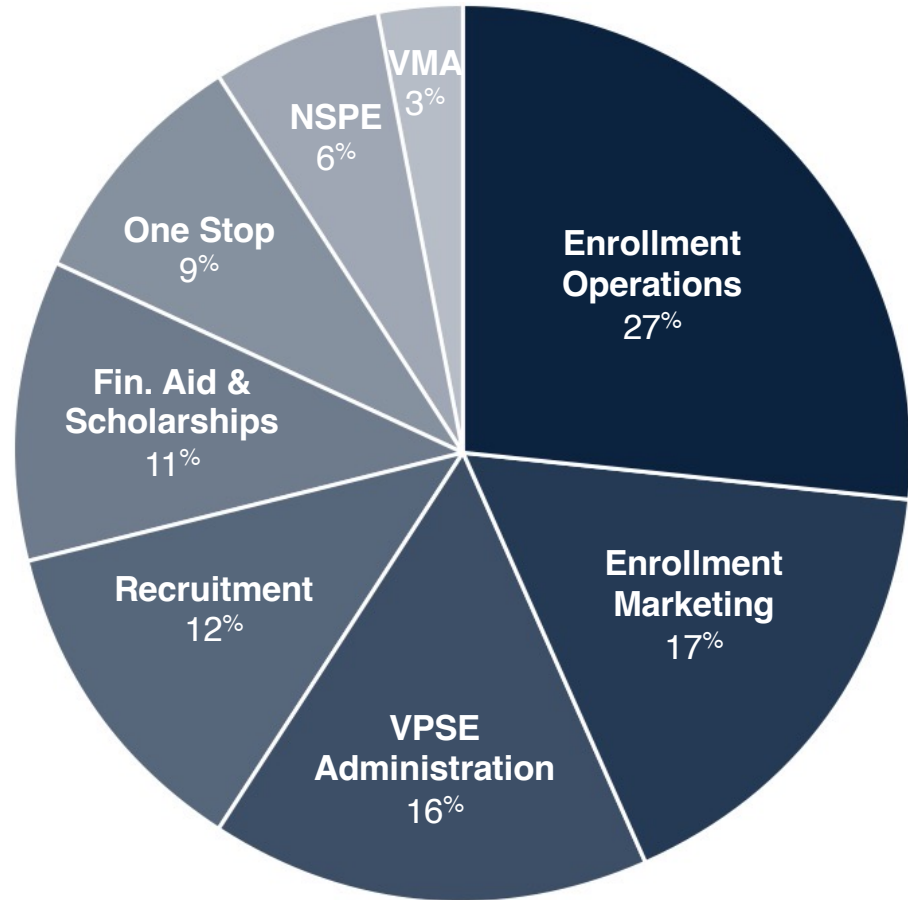
Pro Forma

	<i>Actuals</i>		<i>Projections</i>		
	FY20	FY21	FY22	FY23	FY24
Gross Revenue	\$ 9,588,334	\$ 10,890,615	\$ 10,633,625	\$ 10,857,221	\$ 10,999,732
SIF Participation	\$ 74,125	\$ 326,271	\$ 319,220	\$ 319,220	\$ 325,604
E&G, Designated Tuition, Other Sources	\$ 7,335,604	\$ 6,889,872	\$ 7,237,820	\$ 7,300,348	\$ 7,486,822
Net Revenue	\$ 16,849,813	\$ 17,454,216	\$ 17,552,225	\$ 17,838,350	\$ 18,160,949
Personnel	\$ 13,583,251	\$ 10,864,066	\$ 11,881,926	\$ 12,174,542	\$ 12,365,000
Non-Personnel	\$ 3,257,437	\$ 3,333,249	\$ 5,183,363	\$ 5,500,000	\$ 5,610,000
Total Expenses	\$ 16,840,688	\$ 17,097,315	\$ 17,065,289	\$ 17,674,542	\$ 17,975,000

Budget by Department

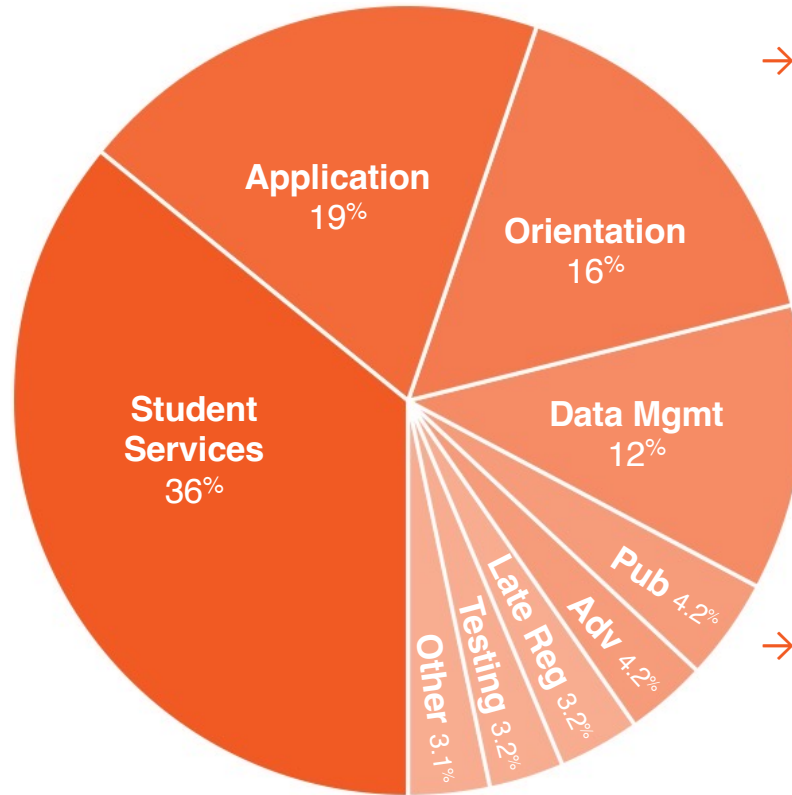
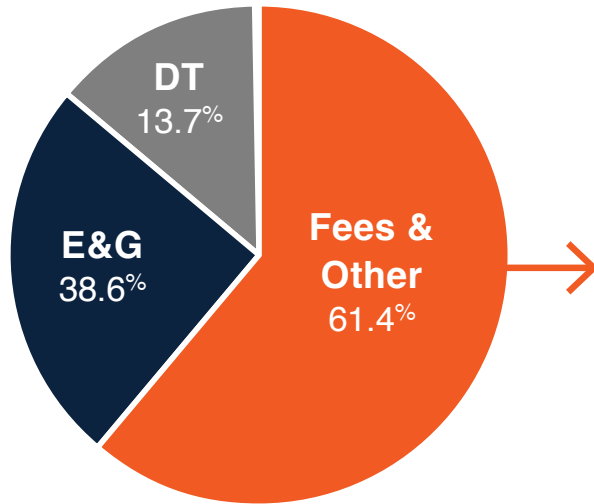
~\$17,500,000

- **27% Enrollment Operations**
- **17% Enrollment Marketing**
- **16% VPSE Administration**
- **12% Recruitment**
- **11% Financial Aid**
- **9% One Stop**
- **6% New Student Program & Events**
- **3% Veteran & Military Affairs**



Budget by Funding Sources

~\$17,500,000



→ Division Sources

- Mandatory Fees
 - Stu Data Mgmt Fee
 - Publication Fee
- Incidental Fees
 - Application Fee
 - Orientation Fee
 - Late Registration Fee
 - Testing Revenue
 - Transcript Revenue
- Overhead Reimbursements
 - Clearinghouse
 - Veteran Affairs

→ Central Sources

- Designated Tuition
- E&G
- Student Services Fee

Budget

Reserves

- Unspent/uncommitted funds from **Student Data Management Fee** and **Publication Fee** are rolled into reserves cost center at end of each fiscal year
- Strategic Enrollment will request use of any reserve funds for one-time initiatives to the Provost & Senior VP for Academic Affairs
 - Admit Packet Outsourcing & Fulfillment
 - One Stop Qless Queuing System
 - Financial Aid Verification Outsourcing
 - Return to Title IV Processing

Carryforwards

- Unspent/uncommitted funds from our local incidental fees are roll forward at end of each fiscal year
- Strategic Enrollment identifies and prioritizes uses for these carryforward funds
 - 2-year temporary appointment of UTSA Military Liaison
 - Office relocation directed by Space Management
 - Facility projects & renovations
 - Seed funding for new new positions in dept

Swept

- Unspent/uncommitted E&G, Designated Tuition and Student Services Fees are swept back to central offices at end of each fiscal year

Appendixes

VPSE Operational Review Presentation

Appendix

SE Funding Sources

Funding Sources	Percentage
E&G	25.0%
Student Services Fee	22.1%
Designated Tuition	13.7%
App Fee	11.8%
Orientation Fee	9.8%
Student Data Management Fee	7.2%
Publication Fee	2.6%
Advising Fee	2.0%
Late Registration fee	2.0%
Testing Revenue	2.0%
Administrative Cost Allowances	1.4%
Overhead Reimbursement	0.4%
International App Fee	0.2%

Local Funds within VPSE:

→ Mandatory Fees

- Student Data Management Fee (\$15/student/semester)
- Publication Fee (\$5/student/semester)

→ Incidental Fees

- Late Registration Fee (\$100/student/semester if bill unpaid by certain date)
- Domestic Undergraduate Application Fee (\$70/application)
- International Undergraduate Application Fee (\$70/application)
- Orientation Fee (\$136/student)
- Testing Services (fees based on market price for tests by testing companies)
- Transcript Fee (fees based on paper/electronic/normal handling/expedited handling of transcript orders by students and alumni)

→ Overhead Reimbursement

- National Student Clearinghouse (enrollment and degree verification)
- Veteran Affairs Overhead Handling Reimbursement (US Dept of VA reimburses UTSA a portion of the amount for GI certification each year)

Appendix

Dashboard

Undergraduate Recruitment Year over Year

Source: IR Report Center pulled 4/11/22

Detailed Funnel Numbers

Breakdown of the numbers by admission type.
 # = number for the year
 #Δ = numerical change between year and previous year
 %Δ = percent change between year and previous year

Entry Semester: College Applied:

Program Type Applied: Program Applied:

[Reset](#)

Applications - Total (Both Complete & Incomplete)									
Year	2020			2021			2022		
Admit Type	#	#Δ	%Δ	#	#Δ	%Δ	#	#Δ	%Δ
FR	24,684			25,628	944	4%	28,387	2759	11%
FT	818			872	54	7%	787	-85	-10%
TR	2,446			2,517	71	3%	1,911	-606	-24%
RE	131			80	-51	-39%	89	9	11%
SU/PB	127			118	-9	-7%	115	-3	-3%
INTL	358			488	130	36%	648	160	33%
Total	28,564			29,703	1139	4%	31,937	2234	8%

Applications - Complete									
Year	2020			2021			2022		
Admit Type	#	#Δ	%Δ	#	#Δ	%Δ	#	#Δ	%Δ
FR	18,496			18,092	-404	-2%	19,622	1530	8%
FT	474			484	10	2%	459	-25	-5%
TR	1,588			1,464	-124	-8%	1,142	-322	-22%
RE	88			66	-22	-25%	60	-6	-9%
SU/PB	98			84	-14	-14%	72	-12	-14%
INTL	205			222	17	8%	191	-31	-14%
Total	20,949			20,412	-537	-3%	21,546	1134	6%

Applications - Incomplete									
Year	2020			2021			2022		
Admit Type	#	#Δ	%Δ	#	#Δ	%Δ	#	#Δ	%Δ
FR	6,188			7,536	1348	22%	8,765	1229	16%
FT	344			388	44	13%	328	-60	-15%
TR	858			1,053	195	23%	769	-284	-27%
RE	43			14	-29	-67%	29	15	107%
SU/PB	29			34	5	17%	43	9	26%
INTL	153			266	113	74%	457	191	72%
Total	7,615			9,291	1676	22%	10,391	1100	12%

Admitted									
Year	2020			2021			2022		
Admit Type	#	#Δ	%Δ	#	#Δ	%Δ	#	#Δ	%Δ
FR	13,380			13,954	574	4%	15,513	1559	11%
FT	366			368	2	1%	367	-1	-0%
TR	1,387			1,189	-198	-14%	954	-235	-20%
RE	64			42	-22	-34%	52	10	24%
SU/PB	88			62	-26	-30%	64	2	3%
INTL	171			159	-12	-7%	171	12	8%
Total	15,456			15,774	318	2%	17,121	1347	9%

Denied									
Year	2020			2021			2022		
Admit Type	#	#Δ	%Δ	#	#Δ	%Δ	#	#Δ	%Δ
FR	2,977			23	-2954	-99%	220	197	857%
FT	56			31	-25	-45%	40	9	29%
TR	100			51	-49	-49%	56	5	10%
RE	3			3	0	0%	0	-3	-100%
SU/PB	1			0	-1	-100%	4	4	
INTL	13			6	-7	-54%	10	4	67%
Total	3,150			114	-3036	-96%	330	216	189%

Other Admission Decisions									
Year	2020			2021			2022		
Decision	#	#Δ	%Δ	#	#Δ	%Δ	#	#Δ	%Δ
16-Offered Lead Academy	274			806	532	194%	857		
27-Admit Lead Academy	72			138	66	92%	253		
28-Offered OnTrac Program	46			392	346	752%	1,208		
70-Admit OnTrac Program	3			25	22	733%	111		
Total	395			1,361	966	245%	2,429		

Appendix

Dashboard

Financial Aid

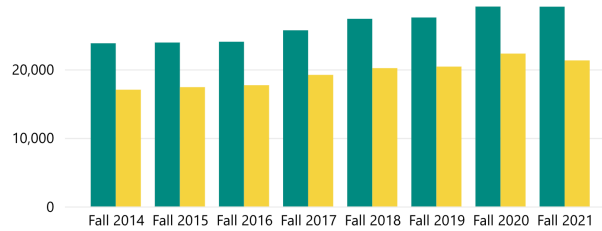
Source: IR Report Center
pulled 4/11/22

Financial Aid Paid by Term - Undergraduate Students

Classification: All |
 College: All |
 Department/School: All
Go to Graduate

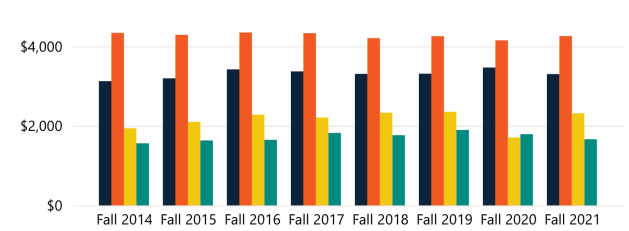
Headcount by Term

● Total Students ● Students with Aid



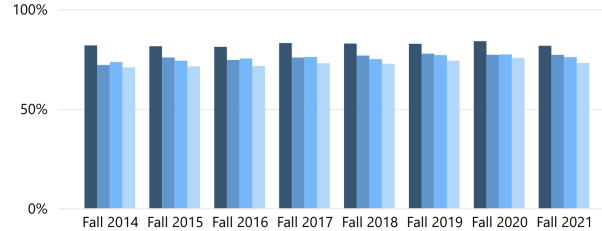
Average Aid by Type*

● Grants ● Loans ● Scholarships and Stipends ● Work Study



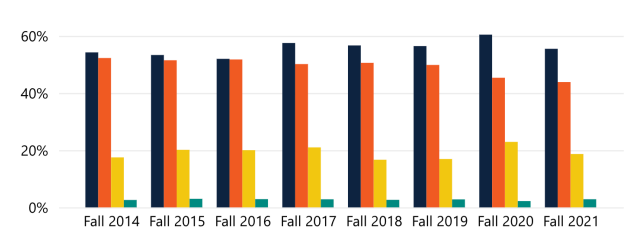
Percent of Students who Submitted a FAFSA

● Freshman ● Sophomore ● Junior ● Senior



Percent of Students who Received Aid by Type*

● Grants ● Loans ● Scholarships and Stipends ● Work-Study



*Note: Students are counted once in each category they received aid.

Appendix

Dashboard

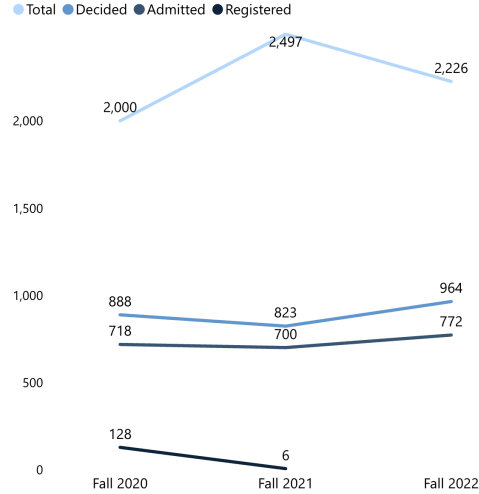
Graduate Recruitment

Source: IR Report Center
pulled 4/11/22

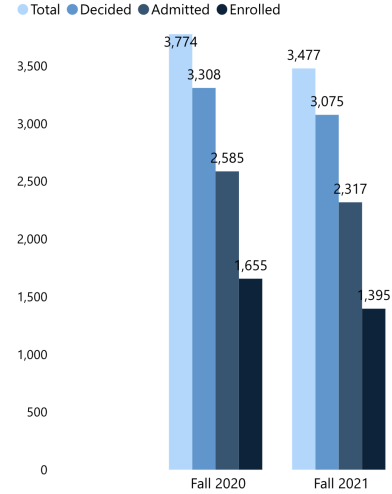
Graduate Recruitment Funnel

Graphs have different scales on the Y axis

As of today in this cycle and previous cycles



End of cycle



Reset

Last Refreshed: APR-11-2022 06:50 AM

Semester

Admit Type

VIP Applicants

GRUN Applicants

College

Department

Program

Race/Ethnicity

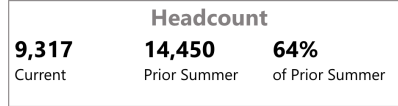
Gender

Appendix

Dashboard

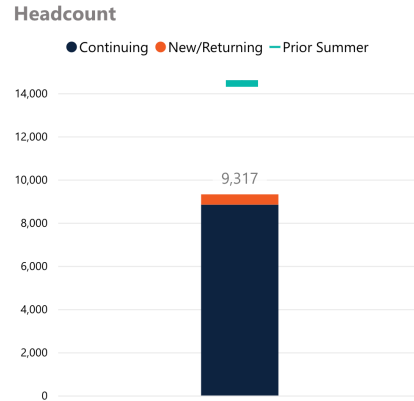
Summer Enrollment

Source: IR Report Center
pulled 4/11/22

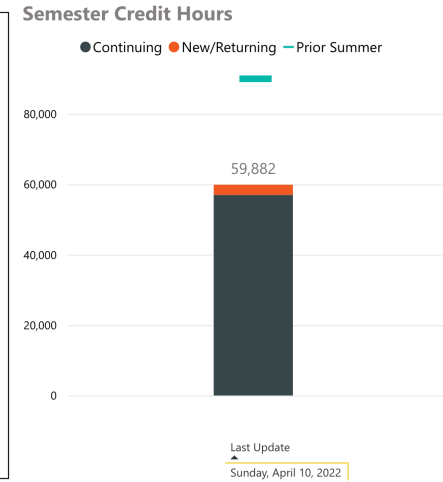


Summer 2022 Enrollment

This dashboard shows enrollment and semester credit hour data for the Summer 2022 semester.



Student Level	Headcount	Hours Enrolled
Undergraduate	7,627	51,229
Freshman	666	4,485
Sophomore	1,193	8,039
Junior	2,507	17,943
Senior	3,009	19,233
Special Undergraduate	22	112
Undergrad Teaching Certificate	5	36
Post Baccalaureate	225	1,381
Masters-Graduate	1,454	7,836
Graduate, Master's	1,443	7,790
Special Graduate	11	46
Doctoral-Graduate	236	817
Doctoral	236	817
Total	9,317	59,882

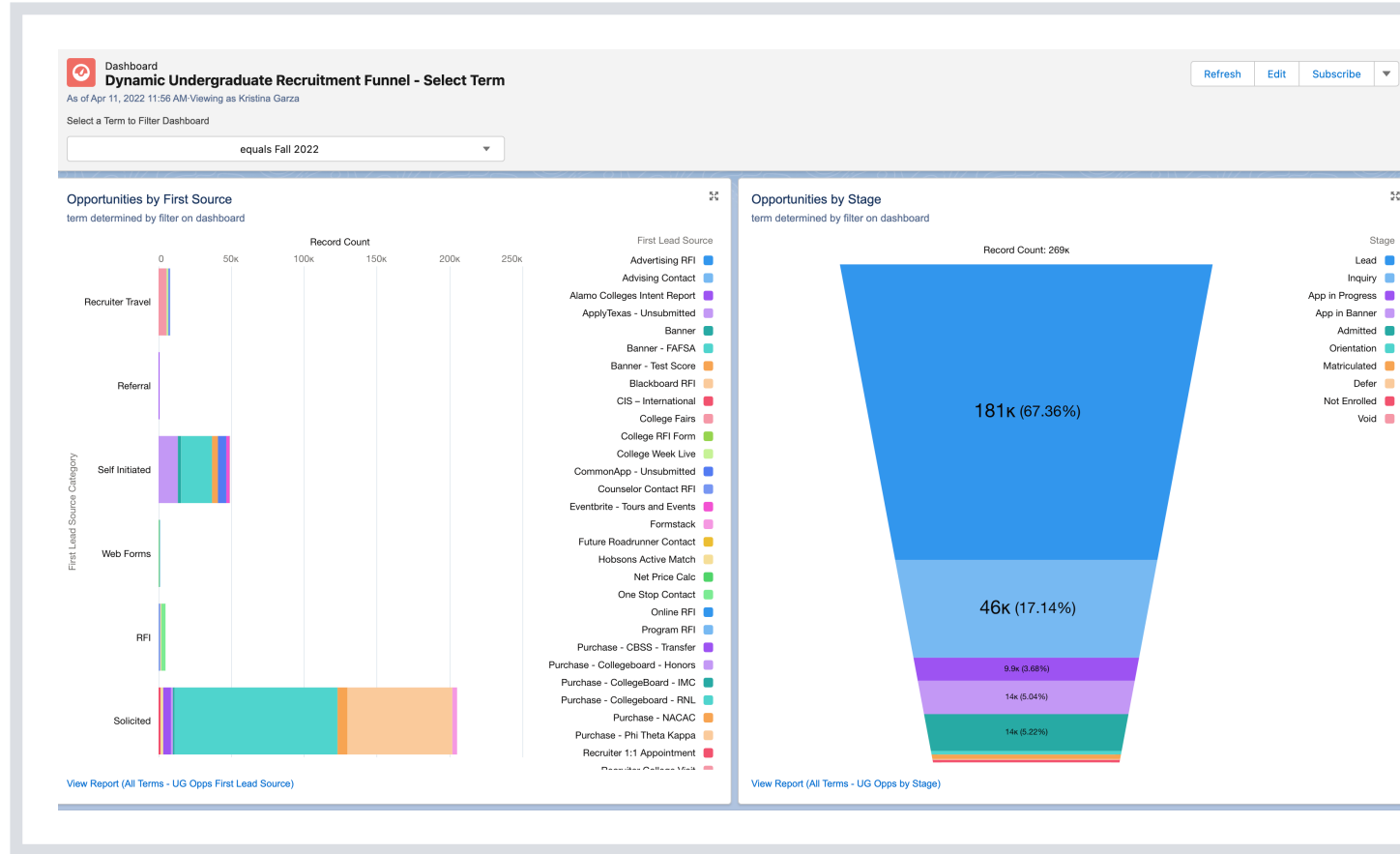


Appendix

Dashboard

CRM Undergraduate Recruitment Funnel

Source: Salesforce pulled 4/11/22

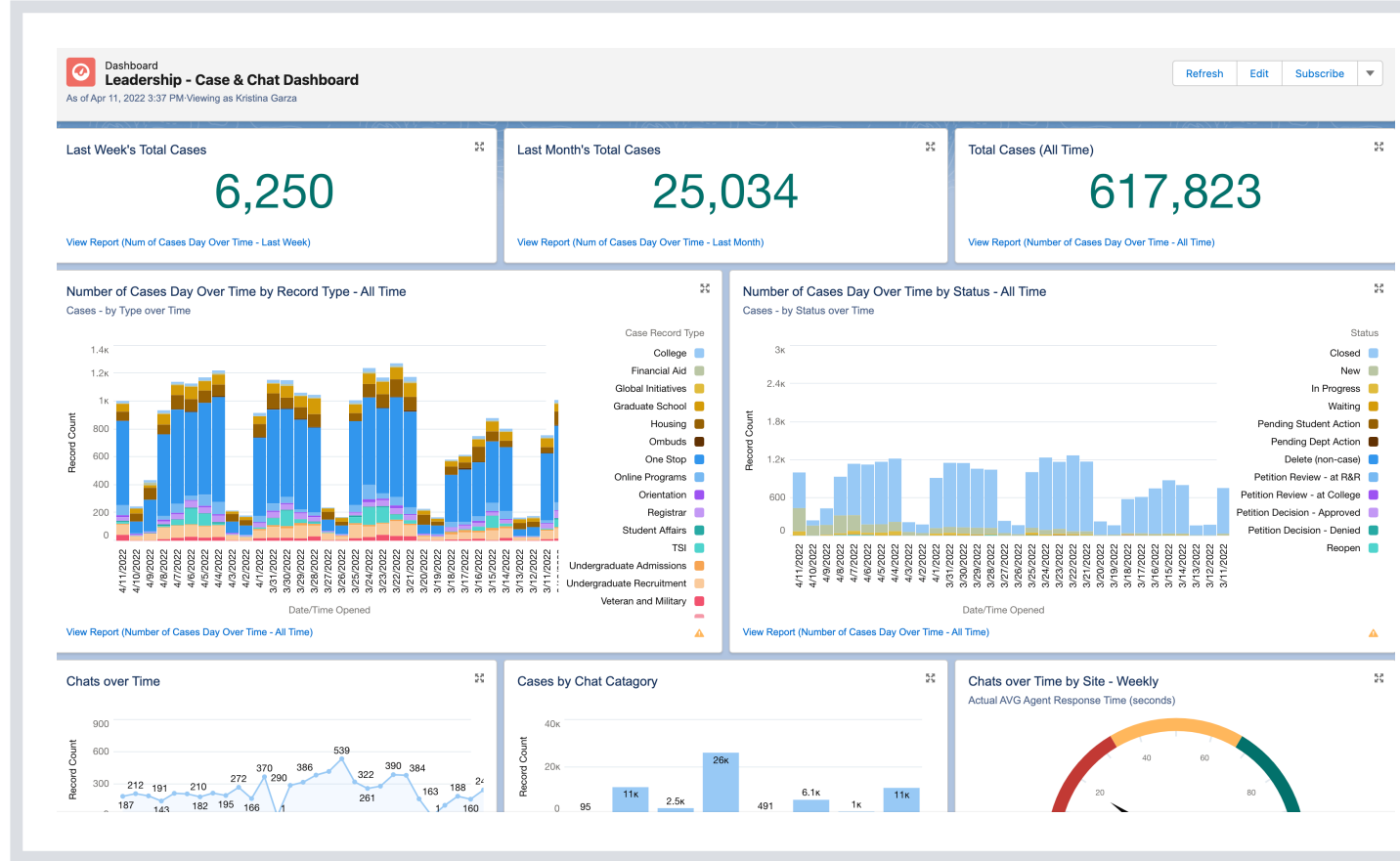


Appendix

Dashboard

Salesforce Cases over Time

Source: Salesforce pulled 4/11/22





Strategic Enrollment

5-Year Proforma with Projected Revenues and Expenses

Revenues														
Fees														
	FY 2020 Actuals	\$ Change	% Change	FY 2021 Actuals	\$ Change	% Change	FY 2022 Projection	\$ Change	% Change	FY 2023 Projection	\$ Change	% Change	FY 2024 Projection	Assumptions
Student Fees - Mandatory (3100)	1,482,500	552	0%	1,483,052	(32,052)	-2%	1,451,000	-	0%	1,451,000	29,020	2%	1,480,020	SDMF & Publication Fee
Student Fees - SSF (Mandatory 3115)	2,745,000	8,035	0%	2,753,035	223,105	8%	2,976,140	115,385	4%	3,091,525	61,831	2%	3,153,356	
Student Fees - Non-Mandatory (Course, Lab, and Optional)	2,933,681	1,268,109	43%	4,201,790	104,302	2%	4,306,092	69,508	2%	4,375,600	43,756	1%	4,419,356	
(A) Total Fees	\$ 7,161,181	\$ 1,276,696	18%	\$ 8,437,877	\$ 295,355	4%	\$ 8,733,232	\$ 184,893	2%	\$ 8,918,125	\$ 134,607	2%	\$ 9,052,732	
Gifts, Endowment & Other Income														
	FY 2020 Actuals	\$ Change	% Change	FY 2021 Actuals	\$ Change	% Change	FY 2022 Projection	\$ Change	% Change	FY 2023 Projection	\$ Change	% Change	FY 2024 Projection	Assumptions
Gift Contributions for Operations	-	45,800	-	45,800	9,400	21%	55,200	1,800	3%	57,000	-	0%	57,000	
Direct Endowment & Other Investment Distribution	2,348,939	42,999	2%	2,391,938	(546,745)	-23%	1,845,193	36,904	2%	1,882,096	7,904	0%	1,890,000	
Official Occasions - Investment Income Allocations	78,214	(63,214)	-81%	15,000	(15,000)	-100%	-	-	-	-	-	-	-	
(B) Total Gifts, Endowment, & Other Income	\$ 2,427,153	\$ 25,585	1%	\$ 2,452,738	\$ (552,345)	-23%	\$ 1,900,393	\$ 38,704	2%	\$ 1,939,096	\$ 7,904	0%	\$ 1,947,000	
Other Revenue														
Explain Other Revenue Sources (Insert Additional Lines as needed)	FY 2020 Actuals	\$ Change	% Change	FY 2021 Actuals	\$ Change	% Change	FY 2022 Projection	\$ Change	% Change	FY 2023 Projection	\$ Change	% Change	FY 2024 Projection	Assumptions
Sales & Services	128,195	(15,596)	-12%	112,599	(2,599)	-2%	110,000	10,000	9%	120,000	-	0%	120,000	
Sales & Services	-	-	-	-	-	-	-	-	-	-	-	-	-	
Transfers In	4,681,882	(383,422)	-8%	4,298,460	216,480	5%	4,514,941	45,149	1%	4,560,090	136,803	3%	4,696,893	E&G
Transfers In	285,729	(285,729)	-100%	-	-	-	-	-	-	-	-	-	-	State Appropriations - Non-Formula Special Items
Transfers In	2,007,298	212,735	11%	2,220,033	126,825	6%	2,346,858	0	0%	2,346,858	46,937	2%	2,393,795	Designated Tuition
Other Revenue	232,500	26,280	11%	258,780	7,242	3%	266,022	7,378	3%	273,400	2,734	1%	276,134	
Other Revenue	-	-	-	-	-	-	-	-	-	-	-	-	-	F&A Allocation
(C) Total Other Revenue	\$ 7,335,604	\$ (445,732)	-6%	\$ 6,889,872	\$ 347,948	5%	\$ 7,237,820	\$ 62,528	1%	\$ 7,300,348	\$ 186,474	3%	\$ 7,486,822	
Total Unit Revenue before Strategic Investment Outflow														
	FY 2020 Actuals	\$ Change	% Change	FY 2021 Actuals	\$ Change	% Change	FY 2022 Projection	\$ Change	% Change	FY 2023 Projection	\$ Change	% Change	FY 2024 Projection	Assumptions
(D) Total Unit Revenue before Strategic Investment Outflow (A+B+C)	\$ 16,923,938	\$ 856,549	5%	\$ 17,780,487	\$ 90,957	1%	\$ 17,871,445	\$ 286,125	2%	\$ 18,157,570	\$ 328,984	2%	\$ 18,486,554	
Strategic Investment Fund (SIF) Participation														
Amount transferred out for Strategic Investment Fund Participation	FY 2020 Actuals	\$ Change	% Change	FY 2021 Actuals	\$ Change	% Change	FY 2022 Projection	\$ Change	% Change	FY 2023 Projection	\$ Change	% Change	FY 2024 Projection	Assumptions
Strategic Investment Participation (14%)	-	207,627	-	207,627	(4,487)	-2%	203,140	-	0%	203,140	4,063	2%	207,203	
Strategic Investment Participation - Mandatory Fees (5%)	74,125	44,519	60%	118,644	(2,564)	-2%	116,080	-	0%	116,080	2,322	2%	118,402	5% first year, then 8%
(E) Total Strategic Investment Fund Participation	\$ 74,125	\$ 252,146	340%	\$ 326,271	\$ (7,051)	-2%	\$ 319,220	\$ -	0%	\$ 319,220	\$ 6,384	2%	\$ 325,604	
Total Unit Revenue														
	FY 2020 Actuals	\$ Change	% Change	FY 2021 Actuals	\$ Change	% Change	FY 2022 Projection	\$ Change	% Change	FY 2023 Projection	\$ Change	% Change	FY 2024 Projection	Assumptions
(F) Total Unit Revenue (D-E)	\$ 16,849,813	\$ 604,403	4%	\$ 17,454,216	\$ 98,009	1%	\$ 17,552,225	\$ 286,125	2%	\$ 17,838,350	\$ 322,600	2%	\$ 18,160,949	

Expenses

University of Texas at San Antonio
Operational Reviews 5-Year Proforma

Support Unit Expense Allocation														Assumptions
Amount transferred out for Support Unit Expense Allocations	FY 2020 Actuals	\$ Change	% Change	FY 2021 Actuals	\$ Change	% Change	FY 2022 Projection	\$ Change	% Change	FY 2023 Projection	\$ Change	% Change	FY 2024 Projection	
Academic Support Unit	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Administrative Support Unit	-	-	-	-	-	-	-	-	-	-	-	-	-	-
(G) Total Support Unit Expense Allocation	\$ -	\$ -	-	\$ -	\$ -	-	\$ -	\$ -	-	\$ -	\$ -	-	\$ -	-
Direct Personnel Expenses														Assumptions
Personnel Expenses	FY 2020 Actuals	\$ Change	% Change	FY 2021 Actuals	\$ Change	% Change	FY 2022 Projection	\$ Change	% Change	FY 2023 Projection	\$ Change	% Change	FY 2024 Projection	
Faculty Salary	-	-	-	-	-	-	-	-	-	-	-	-	-	-
A&P and Classified Salary	10,314,390	(2,033,726)	-20%	8,280,664	493,266	6%	8,773,930	635,370	7%	9,409,300	90,700	1%	9,500,000	
Wages or Hourly Salary	226,639	8,382	4%	235,021	(60,116)	-26%	174,905	58,943	34%	233,848	6,152	3%	240,000	
Benefits	3,042,222	(693,841)	-23%	2,348,381	584,710	25%	2,933,091	(401,697)	-14%	2,531,394	93,606	4%	2,625,000	
(H) Total Direct Personnel Expenses	\$ 13,583,251	\$ (2,719,185)	-20%	\$ 10,864,066	\$ 1,017,860	9%	\$ 11,881,926	\$ 292,616	2%	\$ 12,174,542	\$ 190,458	2%	\$ 12,365,000	
Direct Non-Personnel Expenses														Assumptions
Non-Personnel Expenses (Insert Additional Lines as needed)	FY 2020 Actuals	\$ Change	% Change	FY 2021 Actuals	\$ Change	% Change	FY 2022 Projection	\$ Change	% Change	FY 2023 Projection	\$ Change	% Change	FY 2024 Projection	
M&O Budget	3,257,437	75,812	2%	3,333,249	1,850,114	56%	5,183,363	316,637	6%	5,500,000	110,000	2%	5,610,000	spending increased in FY22 with COVID-19 restrictions removed and initiatives re-engaged. See notes in footer pertaining to the yearly deviations.
Utilities	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Provisions for Facility Renewal & Deferred Maintenance	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Mandatory Transfers Out (Debt Service)	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Other Transfers Out (Explain)	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Other (Explain)	-	2,900,000	-	2,900,000	(2,900,000)	-100%	-	-	-	-	-	-	-	operational stop because of COVID-19 pandemic (travel, hiring, m&o, strategic initiatives with increased funding freezes)
(I) Total Direct Non-Personnel Expenses	\$ 3,257,437	\$ 2,975,812	91%	\$ 6,233,249	\$ (1,049,886)	-17%	\$ 5,183,363	\$ 316,637	6%	\$ 5,500,000	\$ 110,000	2%	\$ 5,610,000	
Total Unit Expenses (Including Support Unit Expense Allocation)														
	FY 2020 Actuals	\$ Change	% Change	FY 2021 Actuals	\$ Change	% Change	FY 2022 Projection	\$ Change	% Change	FY 2023 Projection	\$ Change	% Change	FY 2024 Projection	
(J) Total Unit Expenses and Support Unit Expense Allocation (G+H+I)	\$ 16,840,688	\$ 256,627	2%	\$ 17,097,315	\$ (32,026)	0%	\$ 17,065,289	\$ 609,253	4%	\$ 17,674,542	\$ 300,458	2%	\$ 17,975,000	
Operating Margin														
	FY 2020 Actuals	\$ Change	% Change	FY 2021 Actuals	\$ Change	% Change	FY 2022 Projection	\$ Change	% Change	FY 2023 Projection	\$ Change	% Change	FY 2024 Projection	
(K) Total Operating Margin (F-J)	\$ 9,125	\$ 347,776	3811%	\$ 356,901	\$ 130,035	36%	\$ 486,936	\$ (323,128)	-66%	\$ 163,807	\$ 22,142	14%	\$ 185,949	

Notes to Non-Personnel Expense

We wanted to provide some additional information about the non-personnel expense increase from FY21 \$3,333,249 to FY22 \$5,183,363. This is driven from increased fee funds:

- Student Data Management Fee was increased right before the pandemic from \$10/student/semester to \$15/student/semester
- with increased applications to UTSA, the undergraduate application fee revenue is increasing
- with increased enrollment in Orientation programming and the new fee structure for it, Orientation revenue is increasing
- the inception of the Transcript Fee is new revenue

As a result, new initiatives across Strategic Enrollment as well as investment in existing initiatives increase the expenses directly related to the increased revenue include but are not limited to:

- streamlining of processing for student records, transcripts, grades, residency, etc.
- travel and investment in technology for recruitment initiatives related to the momentum of the strategic initiative to grow enrollment
- ProEd ProVerifier+ outsourced verification service for Financial Aid & Scholarships
- Diploma and digital certificates outsourcing (Parchment)

Operational Review Packet

Name of Unit: Strategic Enrollment

College / Division: Academic Affairs

Contact Name: Lynn Barnes

Phone/Email: ext 4041, lynn.barnes@utsa.edu

Type of Unit:

Academic Support Unit

Auxiliary Unit

Administrative Support Unit

REQUIRED DOCUMENTS:

FIRST SUBMITTAL -

General Information to "Tell Your Story"

Explain "who you are", "what you do", "how you do it", and "how it aligns to the destination & strategic initiatives."

Organizational Chart and Position Data

Provide snapshot of functional organization chart with FTE information; identify potential or planned staffing or organization changes

SECOND SUBMITTAL -

Challenges / Opportunities

Explain critical issues and identify potential opportunities and efficiencies; discuss benefits to students and campus

Key Performance Indicators / Benchmarks / Comparisons

Provide operational and efficiency metrics along with benchmarks or comparisons; Explain service delivery model framework, including service expectations and aspirations

Budget / Actual Financial Data

5-Year Proforma; Provide actuals for prior 2 years, current year projection, and 2 additional future year projections [Note: Template will be provided]

Explanation of Reserves

Provide details of current balances and practice of adding to reserves each year; Provide 3 years of prior growth and current projection.

Supplemental Information (Optional) :

Customer Surveys	<input type="checkbox"/>	Summary of current year results, along with changes over time
External Review Data	<input checked="" type="checkbox"/>	Summary of results from an external source, such as related to accreditation/assessment
Trending Data	<input checked="" type="checkbox"/>	Trend data showing how an operation has changed over time, explaining conclusions

Describe Any Additional Information Provided (Optional) :

AACRAO audit result for Registrar - benchmarking; SE Funding by Local vs Fee; Appendix Dashboard Reports;
FAID Ellucian Engagement - Summary of Findings and Recommendations-UTSA

Routing and Approvals:

Unit Director / AVP Signature: Lynn Barnes Jr
Printed Name: Lynn Barnes, Jr.

Date: 4-8-2022

Dean / VP Approval Signature: _____
Printed Name: _____

Date: _____

* Include this cover sheet with the packet submitted to Operational Review Governance Committee