Report of the SCH Target Model Task Force

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Overview

This report documents the efforts of the SCH Target Model Task Force, whose work was completed between October 2008 and April 2009. The work culminates in a proposed model to guide college resource allocation decisions. Sections of the report are as follows:

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Introduction

The SCH Target Model Task Force was appointed in October 2008 with the charge of developing a model for establishing SCH targets for departments and colleges (see Appendix A). The Task Force was comprised of faculty members nominated by deans and appointed by the provost to represent each of the academic colleges, as follows:

Task Force Members
Wendy Ford, Chair (Dean, Arts and Sciences).
Meagan Karvonen (Education and Allied Professions)
Jerry Kinard (Business)
Matthew Liddle (Fine and Performing Arts)
Bill Ogletree (Health and Human Sciences)
Joseph Pechmann (Arts and Sciences)
James Zhang (Kimmel School)

The Task Force met regularly over a six-month period. In this time, they studied the institutional funding formula (see Appendices B-C) and reviewed data pertaining to enrollment trends (see Appendix D) and instructional allocations (see Appendices E-I) across Academic Affairs. They also consulted with the following campus administrators to learn about issues relevant to SCH production across colleges and academic functions, and in relation to the institutional funding model:

Academic Administrators Consulted
Pat Brown, Dean, Educational Outreach
Dave Butcher, Associate Dean, College of Arts and Sciences (representing sciences)
Kyle Carter, Provost and Vice Chancellor, Academic Affairs
Michael Dougherty, Dean, College of Education and Allied Professions
Scott Higgins, Dean, Graduate School and Research
Ronald Johnson, Dean, College of Business
Robert Kehrberg, Dean, College of Fine and Performing Arts
Robert McMahan, Dean, Kimmel School
David Onder, Institutional Planning and Effectiveness
Brian Railsback, Dean, Honors College
Linda Stanford, Dean, College of Health and Human Sciences
Wendy Ford, Dean, College of Arts and Sciences
Melissa Wargo, Director, Institutional Planning and Effectiveness
Chuck Wooten, Vice Chancellor, Finance and Administration

Over the course of the study, the Task Force refined its vision, determining that the model should:

1. Generate targets that support growth across the institution;

2. Inform decisions about the allocation of resources across programs, especially potential needs to shift existing resources and allocate new resources in response to changing demands;

3. Help the institution correct course following a pattern of over-projections and make more accurate projections in future years; and

4. Provide guidance to unit heads on maximizing SCH production with consideration of programmatic priorities and identified needs.

The Task Force intended to develop a model that would promote proactive decision-making at the university, college/school, and department levels. Applying the model proactively would allow us to operate in a more systematic manner and be better prepared to handle an array of fiscal conditions. The Task Force also recognized that a target model would need to be applied within the broader context of institutional mission and priorities, and not in a rigid or arbitrary manner.

Critical Challenges and Recommendations

In considering institutional policies and practices in the context of university funding and enrollment patterns, the Task Force identified 11 critical challenges and specific recommendations for responding to these challenges in the development of a target model. The challenges were discussed with the provost before the Task Force completed the process of model development. All of the Task Force's recommended responses to the challenges were supported in principle by the provost.

Challenge 1: There is presently no distinction between SCH (or FTE) generated by instructor type (full-time, part-time, GTA). However, budgets are separated by instructor type and unit heads historically have not had authority to shift funds across instructor types.

> Recommendation: Establish single SCH (or FTE) generation target across instructor types, allowing units to earn a total pool of instructional resources, and give unit heads authority to shift resources across instructional types within defined parameters.

Challenge 2: Presently, the campus considers resident and distance SCH (or FTE) separately. However, units must spread instructional assignments to meet the needs of target audiences in both contexts. Only in this way are they able to count faculty contributions in both contexts as part of load.

> Recommendation: Establish single SCH (or FTE) target across instructional contexts, allowing units to earn a total pool of instructional resources, and give flexibility to shift resources across instructional contexts within defined parameters.

Challenge 3: Presently, units do not have flexibility to apply lapsed salaries toward increasing instructional capacity and SCH (or FTE) generation, as is the norm at other UNC institutions. However, units' SCH (or FTE) expectations are based on initial salary allocations, rather than actual allowed salary expenditures.

> Recommendation: Allow units to apply lapsed salaries toward temporary instructional positions and support.

Challenge 4: The current university workload policy mistakenly applies the 2007 funding formula to all SCH (or FTE) but the funding formula only pertains to SCH (or FTE) growth since 2007, and prior versions of the funding formula only pertain to SCH (or FTE) growth over the established 1999 baseline level. Importantly, the 2007 formula alone cannot account for approximately 30 additional positions earned at baseline or prior formula levels.

> Recommendation: Develop a modified formula for internal purposes based on the 2007 funding formula plus a 5.5% modification index. The modified formula will bridge the gap in pre- and post-1999 and 2007 rates. (The modification index should be reviewed periodically, perhaps every other year.)

Challenge 5: Faculty FTE may need to be higher in some units than generated per the funding formula.

Recommendation: Allocate faculty FTE to deans in accordance with the modified funding formula with *adjustments* to ensure adequate support for faculty-intensive programs. Also maintain pool of surplus faculty FTE at provost level for discretionary allocation.

Challenge 6: Faculty salary may need to be higher in some units than average salary applied in funding formula.

Recommendation: Allocate salary to deans in accordance with the modified funding formula with *adjustments* to ensure adequate support for high-salary disciplines. Also maintain pool of surplus salary funds at provost level for discretionary allocation.

Challenge 7: Previous allocations of faculty FTE and salary have been made without any clear connection to the funding formula by which instructional resources are generated. At this point, some units are so far underfunded and others so far overfunded that changes in accordance with a new SCH (or FTE) target model could be fairly drastic.

Recommendation: Implement new SCH (or FTE) target model now, but enact allocation changes for colleges deemed under/overfunded incrementally over time.

Challenge 8: Program enrollment trends in specific disciplines can shift dramatically over a few years, but investments in faculty lines cannot be shifted as quickly.

Recommendation: Base allocations on 3-year rolling SCH (or FTE) averages to provide some stability in faculty positions while allowing for changes over time. Give consideration to unique program circumstances, such as new program development. Also encourage programs to respond to emerging trends by initially investing in temporary faculty lines until the market stabilizes.

Challenge 9: Currently, units do not receive increased academic support corresponding with increased faculty FTE per the funding formula, as is the norm at other UNC institutions.

Recommendation: Allocate a minimum of 50% of earned academic support (minus fringe benefits) to deans in accordance with the modified funding formula while retaining the remainder for provost discretionary allocation and centralized academic support.

Challenge 10: Approximately 8% of current instructional FTE and 5% of current instructional salaries are assigned for purposes other than direct instruction—that is, other than regular faculty, part-time faculty, distance education, or graduate assistants.

Recommendation: Where possible, shift non-instructional positions and support to other funding sources. Also consider *adjusting* internal SCH (or FTE) targets upward to generate additional FTE and salaries that may be retained for important instructional support functions.

Challenge 11: The funding formula is based on enrollment projections, rather than actual enrollments.

Recommendation: Make conservative projections and base allocations on actual enrollments, which are the best predictor of conservative projections. Also ensure that projections are made in close consultation with Academic Affairs, which should inform the process by addressing emerging curricular issues with significant implications for enrollment shifts, such as new program development, program deletions, changes in curriculum requirements, changes in liberal studies, changes in accreditation requirements, and/or changes in academic policies.

Proposed Model for Guiding College Resource Allocations

Target Ratios of FTE Earned/Allocated

1. Propose that each college be assigned a target ratio of FTE earned/allocated. Provost decisions about adjustments to future FTE allocations will be based on college performance relative to target ratio.

2. FTE "earned" would reflect a 3-year rolling average of FTE generated in each college per the 2007 funding formula, but applying the following adjustments for internal implementation purposes:

a. 09-10 implementation would reflect a 2-year average, given the challenges of incorporating initial Banner data from 3 years ago.

b. 2007 funding formula (12-cell matrix) is depicted below as an expanded 16-cell matrix for internal purposes. The 16-cell matrix accounts for the 10% undergraduate cost factor (credit for undergraduate resident courses) awarded to the institution.

16-Cell Matrix for SCH/FTE:

Applies undergraduate cost factor for resident courses to original 12-cell matrix*

	UG (Res)	UG (DE)	Masters	Doctoral
I	644.22	708.64	169.52	115.56
II	487.04	535.74	303.93	110.16
III	369.31	406.24	186.23	109.86
IV	211.14	232.25	90.17	80.91

*Modification Index will be applied to all FTE earned. Initial MI is proposed as 5.5% credit.

c. Modification Index (MI) will be applied to the total FTE earned per the 2007 funding formula. MI represents a factor of an appropriate percentage to bridge the gap in pre- and post-1999 and 2007 funding formulas. This would enable the university to account for all positions legitimately earned to date at 1999 baseline or pre-2007 levels. The proposed initial MI provides a 5.5% credit, but the MI should be revisited annually. As the university grows, the MI should shrink.

3. FTE "allocated" would reflect the current year allocation of FTE lines to each college.

4. Baseline target ratio of FTE earned/allocated would be 1/1. Adjustments to baseline may result in targets that are lower or higher than 1/1, but overall must balance to equal budgeted instructional costs. These adjustments may give special consideration to such factors as the following:

a. program costs insufficiently accounted for in the funding formula – must ensure balance between high-cost and low-cost programs

b. expectation for higher/lower student-faculty ratio per accreditation standards, disciplinary standards, or institutional standards (e.g., liberal studies, honors, graduate, distance) – must ensure balance in higher/lower student-faculty ratios

c. planning for new program implementation or existing program phase-out

d. expectation for non-instructional (non-SCH-generating) service –may identify non-instructional funding sources for some services, where appropriate

e. incremental implementation of new targets requiring significant changes in resource allocations over time

f. provost reserve for addressing emergent instructional needs

5. Current ratios of FTE earned/allocated in colleges, based on one-year "earned" data from 07-08 and "allocated" data from 08-09, are reported in Appendix J.

6. Target ratios of FTE earned/allocated may be implemented incrementally over time for programs that are significantly under/overfunded.

7. WCU's future enrollment projections to GA should be made in close consultation with Academic Affairs to ensure sensitivity to emerging curricular issues with significant implications for enrollment shifts, such as new program development or deletions, as well as changes in curriculum requirements, accreditation standards, general education, and/or academic policies.

Salary Allocations

1. Propose that each college be assigned a salary pool associated with FTE allocations.

2. FTE and salary allocations to each college would be granted as a total pool of instructional resources which the dean may apply across instructor types (tenured/tenure-track, fixed-term, part-time, GTA) and instructional contexts (resident, distance).

3. Baseline salary allocations would match the levels awarded by General Administration. For instance, the level assigned in 08-09 was $73,983 per FTE. Adjustments to baseline may give special consideration to such factors as the following:

a. market-based salaries relative to disciplines, beyond what are accounted for in the funding formula (16-cell matrix)

b. distance from 80th percentile in disciplines (per CIP codes)

c. relative composition of lower or higher ranked or endowed faculty

d. over-reliance on temporary faculty (fixed-term, part-time)

e. inclusion of GTA appointments with instructional contributions

f. provost reserve for addressing emergent salary needs

5. Current salary earned/allocated in colleges, based on one-year "earned" data from 07-08 and "allocated" data from 08-09, are reported in Appendix K.

6. Current average salaries allocated per FTE in colleges, separating tenure-track and fixed-term, are reported in Appendix (not yet available).

7. Colleges would have the authority to apply lapsed salaries toward temporary instructional positions and support, thereby responding to student needs and increasing SCH generation. This shift in authority may occur incrementally over time as budget practices shift to reduce reliance on lapsed salaries for non-instructional purposes.

Academic Support Allocations

Colleges would be allocated a minimum of 50% of earned academic support (minus fringe benefits) associated with FTE and salary allocations.

Tips for Increasing SCH Generation

The following tips are suggestions that might be considered for enhancing SCH generation and associated FTE and salary allocations. However, not all tips will be relevant to all programs.

1. recruit more students into programs; especially engage in targeted recruiting of full-time students and graduate students, who will generate more SCH more quickly

2. encourage students to enroll in more SCH (e.g., encourage full-time undergraduate taking 12 hours to take 15, full-time graduate taking 6 to take 9); this can benefit student by reducing time to graduation as long as number of classes does not exceed capacity to perform well

3. establish a philosophy of reaching a "target cap at census," which requires slightly over-enrolling classes up until the first day, recognizing that drops tend to exceed adds during the first week so that the "census" number will level out around the cap; for instance, a multi-section class normally enrolling 24 per section might allow 26 up until the first day so that the final "census" number levels out around 24, rather than around 22

4. increase offerings of high-demand courses, especially in bottleneck situations

5. decrease frequency of offerings of low-demand courses, especially when routinely under-enrolled, while ensuring student needs are met; this frees up faculty time for high-demand courses

6. reduce frequency of low-enrolled on-line course options while ensuring student needs are met

7. do not offer residential sections of on-line classes if they compete against residential sections of traditional classes

8. decrease course offerings that compete against each other and result in lower enrollments across courses; for instance, if the department offers 4 elective classes with caps of 30 but enrollments across the classes average 20, the department may reduce offerings to 3 classes; this frees up faculty time to offer more high-demand classes

9. increase summer distance education offerings

10. increase class size (cap) where pedagogically sound

11. minimize or eliminate discrepancies between credit hours and contact hours (especially for labs), if pedagogically sound and consistent with accreditation standards; may even use partial hours, such as 1.5 hours

12. recode programs and courses to higher funded CIP codes, where appropriate; this requires curriculum revision process

13. increase use of teaching assistants in instruction or instructional assistance to accommodate more students while providing valuable teaching experience and reinforcing knowledge of discipline

14. increase full-time graduate assistantships in high-demand programs; if required 9 hours/semester, they will generate graduate SCH resulting in state funding increase that greatly exceeds cost; if contribute to instructional capacity, they will also generate undergraduate SCH, providing even greater state funding increases

15. convert part-time funding to graduate assistantships with instructional responsibilities; GA salary is a little higher, but the GA will also contribute to graduate-level SCH

16. schedule classes at times that the target student population will find more appealing; ensure that high-demand classes are not squeezed out of choice time frames by low-demand classes that might appeal to target audiences at evening times

17. revise curriculum to reduce course requirements for majors, particularly when required courses are not necessary and are routinely low-enrolled; this will reduce total number of courses that must be offered on a regular basis, even when low-enrolled

18. convert 4+1 bachelor-master programs to 3+2 bachelor-master programs, if possible, requiring more graduate-level credit (500-level) by fourth year

19. reduce unique course offerings that serve few students

20. enhance quality of teaching to attract and retain more students in courses

21. hold faculty accountable for course enrollments, encouraging them to align elective course options with student needs and interests

22. ensure that different forms of faculty work with students require enrollment in courses generating credit hours; this should include independent studies, thesis and dissertation advising, and internship supervision (including in summer)

23. provide more or better furnishings in rooms to accommodate more students

24. retrofit large rooms, such as auditoriums, to accommodate large classes at least part of the time

25. limit enrollment and admissions in expensive programs where cost per student greatly exceeds revenue per student (will make programs more competitive, but caps should be high enough to allow for sufficient critical mass of students)

Appendix A: Charge to Task Force on SCH Target Model

Charge: To develop a model for establishing SCH targets for departments and colleges.

Funding Reality:

The overall model must result in college/department targets that produce the budgeted SCH associated with the legislative funding formula. Currently, the institution is producing approximately 10,000 SCH below the amount for which we are budgeted. Ideally, the model would provide a 5% cushion.

Guiding Principles:

· The model should not set targets, but establish criteria or parameters for target determination for implementation at the dean level.

· The model should enable oversight of faculty workload at a macro-level, where desired, as long as departments are meeting their SCH targets.

· The model should result in targets that promote growth in SCH production commensurate with standards for generating additional positions of varying CIP codes.

· The model should result in targets that support reasonable standards of discipline-specific pedagogical practice.

· The model should ensure support for service courses requiring smaller class sizes, such as courses for Liberal Studies and the Honors College, but expectations for class sizes should be reasonable, given the funding reality.

· Classroom space availability should support model implementation.

· The model should be based on "assignable FTE" within the department with clearly established definitions.

Task Force Composition:

The task force should include representation of all academic colleges and provide opportunities for broader input of faculty and administrators.

Appendix B: Excerpt from UNC Semester Credit Hour Enrollment Change Funding Model

The user manual guiding all institutional funding allocations is a 109 page document that will be made available through the provost's office. For this appendix, we have excerpted pages 11-14, which provide an overview of the funding formula for determining allocations to institutions.

Chapter 3
Description of the SCH Enrollment Change Funding Model

Overview of the SCH Funding Formula

The SCH formula for calculating the appropriations request for enrollment change contains five basic components:

- instructional salary costs (see more detail in **Chapter 8**);
- other academic costs within the academic units (see more detail in **Chapter 9**);
- library (see more detail in **Chapter 9**);
- general institutional support (GIS) (see more detail in **Chapter 9**); and
- calculation of the resulting expected tuition revenue and state appropriation request (see more detail in **Chapter 10**).

The SCH enrollment change formula is driven by the projected change in student credit hour (SCH) production as classified in a 12-cell funding matrix comprised of 4 areas of instruction and 3 levels of instruction. The areas of instruction are based on differences in the costs to deliver programs in the various disciplines. The specific disciplines included in each of the four instruction areas and how they were determined are detailed in **Chapter 5**.

The three levels of instruction are undergraduate, masters, and doctoral. These three levels are based on differences in the cost of instruction associated with average class size.

The instructional level assignments for student credit hours are based on the level of course instruction rather than the degree level of students receiving it—the former bearing a more direct relationship to cost factors than the latter.

Separate instructional position factors are provided for each of the 12 cells in the matrix and are used to determine the number of instructional positions required to support the projected level of SCHs. These instructional position factors are expressed in terms of the number of student credit hours per instructional position per academic year. The projected change in student credit hours by program category and level are divided by the corresponding instructional position factors to determine the change in instructional positions required. The projected change may be for either an increase or decrease in the number of instructional positions. Refer to **Chapter 6** "Instructional Position Factors" for further details.

At this point in the formula calculations, the basic number of faculty positions required for incremental enrollment growth has been determined. In addition, the Board of Governors has determined that certain special institutional missions and institutional service to special undergraduate populations require funding levels beyond those provided in the basic faculty positions. As a result, undergraduate cost factors have been developed to provide additional funding for four special situations. When applied, these factors result in higher numbers of instructional positions related to enrollment change. See **Chapter 7** for additional detail regarding undergraduate cost factors.

Once the overall number of new instructional positions is determined, this count is multiplied by an annual salary rate specific to each institution (see **Chapter 8**) in order to determine the change in instructional salary dollars required. The average annual salary rate used is the latest available.

The resulting instructional salary amount is then multiplied by a factor for "Other Academic Costs," (see **Chapter 9**) which is designed to provide funds for fringe benefits for the instructional positions, support staff in the academic departments, and related instructional supplies and expenses. The resulting Total Academic Requirements is the base dollar amount to which additional factors for libraries and general institutional support are applied.

The funding requirements for both the library and General Institutional Support (GIS) components (see **Chapter 9**) are then calculated by multiplying the applicable rate by the Total Academic Requirements.

Exhibit 3-1 provides a schematic overview of the SCH enrollment change formula.

EXHIBIT 3-1
SCH Enrollment-Change Funding Model

Regular Term Request

Campus: **UNC-ABC**

Program Category	Student Credit Hours			SCH per Instructional Position			Instructional Positions Required		
	UG	Masters	Doctoral	UG	Masters	Doctoral	UG	Masters	Doctoral
Category I	4,515	729	0	708.64	169.52	115.56	6.371	4.300	0.000
Category II	6,030	484	8	535.74	303.93	110.16	11.255	1.592	0.073
Category III	2,118	288	0	406.24	186.23	109.86	5.214	1.546	0.000
Category IV	0	0	0	232.25	90.17	80.91	0.000	0.000	0.000
Total	**12,663**	**1,501**	**8**				**22.840**	**7.438**	**0.073**
	Total All SCHs		**14,172**				**Subtotal Positions**		**30.351**
% of Total	89.4%	10.6%	0.1%						

Campus UG Cost Factor	10.0%	2.284
Total Positions Required		32.635
Instructional Salary Rate of Campus		$65,322
Instructional Salary Amount		$2,131,783
Other Academic Costs	44.89%	$956,957
Total Academic Requirements		$3,088,740
Library Rate	11.48%	
Library Amount		$354,587
Gen'l Instit. Support Rate	54.05%	
Neg. Adj't Factor:	50.00%	
Gen'l Instit. Support Amount		$1,669,464
Total Requirements at **UNC-ABC**		$5,112,791

Calculation of Appropriation Request

Requirements Generated by SCH Model				$5,112,791
Tuition Revenue:	*FTE*	*Rate*	*FTE x Rate*	
In-State U/G FTEs	*321*	*1,821*	*584,541*	
Out-of-State U/G FTEs	*97*	*11,263*	*1,092,511*	
Res per G.S. 116-143.6	*10*	*1,821*	*18,210*	
In-State Grad FTEs	*56*	*1,893*	*106,008*	
Out-of-State Grad FTEs	*18*	*11,476*	*206,568*	
Total FTEs	*502*			
Total Expected Revenue				2,007,838
Request Amount				**$3,104,953**

In general, tuition revenues related to the SCHs being projected will be netted against the requirements (determined above) to yield a request for state appropriation. See **Chapter 10** for a more detailed explanation of revenue projections.

Future adjustments to the factors in the SCH funding model will be reviewed by UNC-GA staff and considered for recommendation to the Board of Governors on a periodic basis.

Partial Credit

In certain situations, partial credit hours for course work (0.5 SCH, 0.1 SCH, etc.) are considered appropriate. In reporting actual SCHs, campuses may award and record SCHs in increments of 0.1 SCH. However, SCHs in the funding model will be rounded at the level of the campus total in each cell in the matrix for both actual and projected SCHs. As a result, incremental changes in SCHs and corresponding funding request are made on whole SCHs.

Funding of New Academic Programs

As new academic programs are approved and implemented at the campuses, the SCH enrollment change model will provide incremental funding for them only as the enrollments are projected to materialize. Any start-up costs of the new academic program must be funded through internal reallocation or in the line-item request for new programs in the expansion budget.

Process for Funding Activities not on the SCH Funding Model

Some specialized instructional units remain on the old FTE-based funding model. That is, programs in medicine (ECU and UNC-CH), dentistry (UNC-CH), pharmacy (UNC-CH), veterinary medicine (NCSU), and law (UNC-CH and NCCU), as well as the UNCSA, will continue with the 1/4 FTE stair-step projections of enrollment change and the pre-1998-99 FTE funding model, which applies only to the regular term and does not encompass receipt-based SCHs generated via distance education instruction.

The aggregations of schools into a Health Affairs budget code at ECU and UNC-CH in the accounting and budgeting financial systems and chart of accounts will not be changed solely as a consequence of the different grouping applied for the enrollment change funding model.

All non-formula expansion items not related to SCH enrollment change funding will continue to be funded according to the traditional mechanisms. That is, funding for any growth in workload in these activities would need to be separately requested in the continuation or expansion budget processes.

Appendix C: CIP Code Classifications

12-Cell Matrix of Instructional Level and Disciplinary Instructional Areas			
CIP	Program Title	WCU Course Prefix	Funding Category
09	Communications	CMCR, CMEM, CMHC, CMPM, CMPR, CMTD	1
23	English Language and Literature/Letters	ENGL	1
24		JS, LC	1
27	Mathematics	MATH	1
38	Philosophy and Religion	PAR	1
42	Psychology	PSY	1
43	Protective Services	CJ	1
45	Social Sciences and History	ANTH, GEOG, PSC, SOC	1
54	History	HIST	1
13	Education	BK, COUN, CSP, EDAD, EDCD, EDCI, EDEL, EDHE, EDL, EDMG, EDPY, EDRD, EDSE, EDSU, ELMG, SPED	2
16	Foreign Languages and Literatures	CHER, FREN, GER, JPN, RUSS, SPAN	2
19	Home Economics	CDFR, CFS, CTM, FCS, FS, HT	2
30	Mulit/Interdisciplinary Studies	ASI, GERN, USI	2
31	Parks, Recreation, Leisure and Fitness Studies	HEAL, PE, PRM, SM	2
52	Business Management and Administrative Services	ACCT, BA, ECON, ENT, FIN, HR, IBUS, LAW, MBA, MGT, MKT, PM	2
03	Conservation and Renewable Natural Resources	ES, NRM	3
11	Computer and Information Sciences	CIS, CS	3
15	Engineering-Related Technologies	CM, ECET, ET, ID, IET, IT, MET, TEL	3
26	Biological Sciences/Life Sciences	BIOL, SCI	3
40	Physical Sciences	AST, CHEM, GEOL, PHYS	3
44	Public Administration and Services	EMGT, PA, SOCW	3
50	Visual and Performing Arts	ART, CMTA, DA, IDES, MUS	3
51	Health Professions and Related Sciences	ATTR, CSD, CLS, EMC, ENVH, HEAL, HIA, HSCC, MHS, ND, RTH, PT	3
14	Engineering	ENGR	4
51	Nursing	NSG	4

Appendix D: WCU Enrollment Information

Western Carolina University
Enrollment Information

Regular Term Instruction

Description	2001/02 Budget	2002/03 Budget	2003/04 Budget	2004/05 Budget	2005/06 Budget	2006/07 Budget	2007/08 Budget	2008-09 Budget	2009-10 Budget	2010-11 Budget
Undergrad Cat 1	52,418	52,473	54,103	63,689	76,081	76,110	73,985	71,892	71,124	70,677
Undergrad Cat 2	54,490	54,465	53,699	55,769	44,355	44,371	50,205	50,205	48,871	48,316
Undergrad Cat 3	42,748	42,464	42,096	45,539	64,052	64,077	61,987	61,987	61,786	61,441
Undergrad Cat 4					3,696	3,698	3,683	3,727	3,399	3,225
Undergrad Total	149,656	149,402	149,898	164,997	188,184	188,256	189,860	187,811	185,180	183,659
Masters Cat 1	2,440	2,965	3,256	2,978	2,813	2,815	2,826	2,826	2,674	2,604
Masters Cat 2	7,188	8,521	9,359	10,372	8,919	8,923	5,694	6,507	3,893	2,930
Masters Cat 3	2,652	3,023	3,243	3,154	4,298	4,300	6,105	6,906	6,658	6,589
Masters Cat 4					423	423	301	736	654	588
Masters Total	12,280	14,509	15,858	16,504	16,453	16,461	14,926	16,975	13,879	12,711
Doctoral Cat 1	48	45	57	743	797	799	11	11	11	11
Doctoral Cat 2	471	538	648				831	831	983	943
Doctoral Cat 3	7	9	12				22	22	22	22
Doctoral Cat 4										
Doctoral Total	526	592	717	743	797	799	864	864	1,016	976
Institutn Total	**162,462**	**164,503**	**166,473**	**182,244**	**205,434**	**205,516**	**205,650**	**205,650**	**200,075**	**197,346**

	2001/02 Actual	2002/03 Actual	2003/04 Actual	2004/05 Actual	2005/06 Actual	2006/07 Actual	2007/08 Actual	2008/09 Actual
Undergrad Cat 1	53,473	55,799	57,932	69,975	71,175	70,112	65,128	
Undergrad Cat 2	51,445	50,078	51,753	40,863	44,180	49,015	49,253	
Undergrad Cat 3	40,623	41,544	48,015	58,043	58,850	57,644	58,770	
Undergrad Cat 4				3,383	3,532	3,420	3,837	
Undergrad Total	145,541	147,421	157,700	172,264	177,737	180,191	176,988	
		1.29%	**6.97%**	**9.24%**	**3.18%**	**1.38%**	**-1.78%**	
Masters Cat 1	2,643	2,613	2,997	2,564	2,673	2,476	2,433	
Masters Cat 2	7,922	8,695	9,093	8,212	8,476	5,619	5,912	
Masters Cat 3	2,633	2,814	2,957	3,843	4,085	5,525	6,789	
Masters Cat 4				386	402	448	860	
Masters Total	13,198	14,122	15,047	15,005	15,636	14,068	15,994	
		7.00%	**6.55%**	**-0.28%**	**4.21%**	**-10.03%**	**13.69%**	
Doctoral Cat 1	49	22	-				23	
Doctoral Cat 2	505	506	525	681	757	764	594	
Doctoral Cat 3	10	3					26	
Doctoral Cat 4								
Doctoral Total	564	531	525	681	757	764	643	
		-5.85%	**-1.13%**	**29.71%**	**11.16%**	**0.92%**	**-15.84%**	
Institutn Total	**159,303**	**162,074**	**173,272**	**187,950**	**194,130**	**195,023**	**193,625**	
Actual more (less)	**(3,159)**	**(2,429)**	**6,799**	**5,706**	**(11,304)**	**(10,493)**	**(12,025)**	
Headcount - Fall	6,863	7,033	7,561	8,396	8,665	8,861	9,056	9,051
Growth - HC		**170**	**528**	**835**	**269**	**196**	**195**	**(5)**
Growth - %		**2.48%**	**7.51%**	**11.04%**	**3.20%**	**2.26%**	**2.20%**	**-0.06%**
Ratio - SCH/HC	23.21	23.04	22.92	22.39	22.40	22.01	21.38	0.00
Growth - SCH		**2,771**	**11,198**	**14,678**	**6,180**	**893**	**(1,398)**	
Growth - %		**1.74%**	**6.91%**	**8.47%**	**3.29%**	**0.46%**	**-0.72%**	
HC - RT Only	6,390	6,503	6,907	7,458	7,585	7598	7,452	7,235
RT as % of Total HC	93.11%	92.46%	91.35%	88.83%	87.54%	85.75%	82.29%	79.94%
Growth - HC		113	404	551	127	13	-146	-217
Growth - %		1.77%	6.21%	7.98%	1.70%	0.17%	-1.92%	-2.91%
Ratio - SCH/HC	24.93	24.92	25.09	25.20	25.59	25.67	25.98	0.00

Western Carolina University
Enrollment Information

Distance Education

Description	2001/02 Budget	2002/03 Budget	2003/04 Budget	2004/05 Budget	2005/06 Budget	2006/07 Budget	2007/08 Budget	2008-09 Budget	2009-10 Budget	2010-11 Budget
Undergrad Cat 1	488	1,350	864	1,151	2,538	1,705	3,312	3,709	4,477	4,924
Undergrad Cat 2	696	1,350	2,406	1,919	3,511	3,410	3,091	4,215	5,549	6,104
Undergrad Cat 3	459	567	465	559	950	1,204	3,152	3,245	3,446	3,791
Undergrad Cat 4						372	600	1,413	1,741	1,915
Undergrad Total	1,643	3,267	3,735	3,629	6,999	6,691	10,155	12,582	15,213	16,734
Masters Cat 1		1,367	1,479	1,375	105	373	582	549	701	771
Masters Cat 2	1,293		293	1,576	3,972	5,365	6,271	7,012	9,626	10,589
Masters Cat 3				56	185	321	302	442	690	759
Masters Cat 4						233	598	576	658	724
Masters Total	1,293	1,367	1,772	3,007	4,262	6,292	7,753	8,579	11,675	12,843
Doctoral Cat 1										
Doctoral Cat 2					29	233	306	553	401	441
Doctoral Cat 3										
Doctoral Cat 4										
Doctoral Total	-	-	-	-	29	233	306	553	401	441
Institutn Total	2,936	4,634	5,507	6,636	11,290	13,216	18,214	21,714	27,289	30,018

	2001/02 Actual	2002/03 Actual	2003/04 Actual	2004/05 Actual	2005/06 Actual	2006/07 Actual	2007/08 Actual	2008-09 Actual
Undergrad Cat 1	1,041	864	1,560	2,208	2,910	3,092	3,395	
Undergrad Cat 2	453	1,498	2,082	3,018	2,674	3,328	4,564	
Undergrad Cat 3	561	678	562	861	2,367	2,777	3,308	
Undergrad Cat 4					403	872	1,328	
Undergrad Total	2,055	3,040	4,204	6,087	8,354	10,069	12,595	
Masters Cat 1	117	63	36	87	417	396	744	
Masters Cat 2	1,219	1,736	2,514	3,332	6,246	5,575	7,038	
Masters Cat 3			45	105	407	370	492	
Masters Cat 4		18			247	641	428	
Masters Total	1,336	1,817	2,595	3,524	7,317	6,982	8,702	
Doctoral Cat 1								
Doctoral Cat 2		30		39	66	374	501	
Doctoral Cat 3								
Doctoral Cat 4								
Doctoral Total	-	30	-	39	66	374	501	
Institutn Total	3,391	4,887	6,799	9,650	15,737	17,425	21,798	
Actual more (less)	455	253	1,292	3,014	4,447	4,209	3,584	
Headcount - Fall	253	389	501	748	826	1,003	1,217	
Growth - HC		136	112	247	78	177	214	
Growth - %		53.75%	28.79%	49.30%	10.43%	21.43%	21.34%	
Ratio - SCH/HC	13.40	12.56	13.57	12.90	19.05	17.37	17.91	
Growth - SCH		1,496	1,912	2,851	6,087	1,688	4,373	
Growth - %		44.12%	39.12%	41.93%	63.08%	10.73%	25.10%	

Western Carolina University

Total Budget	165,398	169,137	171,980	188,880	216,724	218,732	223,864	227,364	227,364	227,364
Actual	162,694	166,961	180,071	197,600	209,867	212,448	215,423	-		
Actual (more/less)	(2,704)	(2,176)	8,091	8,720	(6,857)	(6,284)	(8,441)	(227,364)		
Actual	98.37%	98.71%	104.70%	104.62%	96.84%	97.13%	96.23%			

Appendix E: Synthesis of SCH/FTE Rate Data

Pre-1999 Rate:
156,705 SCH and 370.55 FTE; Avg 422.90 SCH/FTE

Post-1999 Growth Rate (based on projected, not actual, growth):
70,659 SCH and 211.70 FTE; Avg 333.77 SCH/FTE

Post-1999 Growth Rate (based on actual growth):
58,718 SCH and about 190 FTE; Avg 309.04 SCH/FTE

Combined Rate Applied to All Earned Positions:
214,952 SCH and approx. 560 FTE; 383.84 SCH/FTE
215,423 SCH and approx. 560 FTE; 384.68 SCH/FTE

2007 Rate if Applied to Determine All Positions:
214,952 SCH and 530.76 FTE; 404.99 SCH/FTE

2007 SCH/FTE Rate: 405
1999 Baseline SCH/FTE Rate: 423 (1.04% 2007 rate)
Post-1999 Growth SCH/FTE Rate (Actual): 309 (76.30% 2007 rate)
Total SCH/FTE Rate: 384 (94.81% 2007 rate)

***Recommendation: Develop modified formula for internal purposes based on the 2007 funding formula plus a modification index of 5.5%. With the modification index, the modified formula will bridge the gap in pre- and post-1999 and 2007 rates to account for total positions earned.**

FTE earned per 2007 rate	*531 FTE*
FTE added per 5.5% Modification Index	*29 FTE*
Total FTE per Modified Formula	*560 FTE*
Actual FTE earned in 07-08	*560 FTE*

Appendix F: Comparative SCH Data for Colleges (Applying Modified Funding Formula)

College	07-08 SCH Production	Modified 07-08 FTE Production	Modified 07-08 Salary Production*	% of SCH Production	% of FTE and Salary Production	Modified Avg. SCH/FTE Production	Modified Avg. Class Size if 3-3 Load
Arts and Sciences	80,067	169.97	$12,574,891	37.2%	30.4%	471.07	26.2
Business	32,577	76.22	$5,638,985	15.2%	13.6%	427.41	23.7
Education and Allied Professions	42,936	116.01	$8,582,768	20.0%	20.7%	370.11	20.6
Fine and Performing Arts	15,605	45.7	$3,381,023	7.3%	8.2%	341.47	19.0
Health and Human Sciences	34,739	123.8	$9,159,095	16.2%	22.1%	280.61	15.6
Kimmel School	9,028	28.31	$2,094,459	4.2%	5.1%	318.9	17.7
WCU Overall	**214,952****	**559.95**	**$41,426,781**			**383.88**	**21.3**

* Applies 08-09 average salary of $73,983

**Actual total SCH is 215,423; 471 are not accounted for in college data

Appendix G: SCH Production Breakdown by College

Arts & Sciences

07-08 SCH Production (Fundable Resident and Distance Credit Hours)

	UG (Res)	UG (DE)	Masters	Doctoral	
I	52,218	609	1,277	23	
II	3,774	141	14	0	
III	20,321	270	1,396	24	
IV	0		0	0	
	76,313	1,020	2,687	47	**80,067**

07-08 FTE Production (with Undergraduate Cost Factor)

	UG (Res)	UG (DE)	Masters	Doctoral		
I	81.06	0.86	7.53	0.20		
II	7.75	0.26	0.05	0.00		
III	55.02	0.66	7.50	0.22		
IV	0.00		0.00	0.00		**Modified (+5.5%)**
	143.83	1.78	15.08	0.42	**161.11**	**169.97**

07-08 Instructional Salary Production (if applied 08-09 average $73,983)

	UG (Res)	UG (DE)	Masters	Doctoral		
I	$5,997,062	$63,625	$557,092	$14,797		
II	$573,368	$19,236	$3,699	$0		
III	$4,070,545	$48,829	$554,873	$16,276		
IV	$0		$0	$0		**Modified (+5.5%)**
	$10,640,975	$131,690	$1,115,664	$31,073	**$11,919,401**	**$12,574,891**

Overall SCH/FTE Production Ratio: 496.97
Modified SCH/FTE Production Ratio: 471.07

Business

07-08 SCH Production (Fundable Resident and Distance Credit Hours)

	UG (Res)	UG (DE)	Masters	Doctoral	
I	0		0	0	
II	27,068	1,023	4,486	0	
III	0		0	0	
IV	0		0	0	
	27,068	1,023	4,486	0	**32,577**

07-08 FTE Production (with Undergraduate Cost Factor)

	UG (Res)	UG (DE)	Masters	Doctoral		
I						
II	55.58	1.91	14.76			
III						
IV						**Modified (+5.5%)**
	55.58	1.91	14.76		**72.25**	**76.22**

07-08 Instructional Salary Production (if applied 08-09 average $73,983)

	UG (Res)	UG (DE)	Masters	Doctoral		
I	$0		$0	$0		
II	$4,111,975	$141,308	$1,091,989	$0		
III	$0		$0	$0		
IV	$0		$0	$0		**Modified (+5.5%)**
	$4,111,975	$141,308	$1,091,989	$0	**$5,345,272**	**$5,638,985**

Overall SCH/FTE Production Ratio: 450.89
Modified SCH/FTE Production Ratio: 427.41

Education and Allied Professions

07-08 SCH Production (Fundable Resident and Distance Credit Hours)

	UG (Res)	UG (DE)	Masters	Doctoral	
I	8,085	420	1,870	0	
II	17,949	3,397	8,321	1,098	
III	1,476	161	159	0	
IV	0	0	0	0	
	27,510	3,978	10,350	1,098	**42,936**

07-08 FTE Production (with Undergraduate Cost Factor)

	UG (Res)	UG (DE)	Masters	Doctoral		
I	12.55	0.59	11.03	0.00		
II	36.85	6.34	27.38	9.97		
III	4.00	0.40	0.85	0.00		
IV	0.00	0.00	0.00	0.00		**Modified (+5.5%)**
	53.40	7.33	39.26	9.97	**109.96**	**116.01**

07-08 Instructional Salary Production (if applied 08-09 average $73,983)

	UG (Res)	UG (DE)	Masters	Doctoral		
I	$928,487	$43,650	$816,032	$0		
II	$2,726,274	$469,052	$2,025,655	$737,611		
III	$295,932	$29,593	$62,886	$0		
IV	$0	$0	$0	$0		**Modified (+5.5%)**
	$3,950,693	$542,295	$2,904,573	$737,611	**$8,135,171**	**$8,582,768**

Overall SCH/FTE Production Ratio: 390.47
Modified SCH/FTE Production Ratio: 370.11

Fine and Performing Arts

07-08 SCH Production (Fundable Resident and Distance Credit Hours)

	UG (Res)	UG (DE)	Masters	Doctoral	
I	348	0	0	0	
II	0	0	0	0	
III	14,703	0	554	0	
IV	0	0	0	0	
	15,051	0	554	0	**15,605**

07-08 FTE Production (with Undergraduate Cost Factor)

	UG (Res)	UG (DE)	Masters	Doctoral		
I	0.54	0.00	0.00	0.00		
II	0.00	0.00	0.00	0.00		
III	39.81	0.00	2.97	0.00		
IV	0.00	0.00	0.00	0.00		**Modified (+5.5%)**
	40.35	0.00	2.97	0.00	**43.32**	**45.70**

07-08 Instructional Salary Production (if applied 08-09 average $73,983)

	UG (Res)	UG (DE)	Masters	Doctoral		
I	$39,951	$0	$0	$0		
II	$0	$0	$0	$0		
III	$2,945,263	$0	$219,730	$0		
IV	$0	$0	$0	$0		**Modified (+5.5%)**
	$2,985,214	$0	$219,730	$0	**$3,204,944**	**$3,381,023**

Overall SCH/FTE Production Ratio: 360.23
Modified SCH/FTE Production Ratio: 341.47

Health and Human Sciences

07-08 SCH Production (Fundable Resident and Distance Credit Hours)

	UG (Res)	UG (DE)	Masters	Doctoral	
I	4,468	2,360	12	0	
II	0	0	159	0	
III	15,228	1,975	4,569	2	
IV	3,353	1,328	1,285	0	
	23,049	5,663	6,025	2	**34,739**

07-08 FTE Production (with Undergraduate Cost Factor)

	UG (Res)	UG (DE)	Masters	Doctoral		
I	6.94	3.33	0.07	0.00		
II	0.00	0.00	0.52	0.00		
III	41.23	4.86	24.53	0.02		
IV	15.88	5.72	14.25	0.00		**Modified (+5.5%)**
	64.05	13.91	39.37	0.02	**117.35**	**123.80**

07-08 Instructional Salary Production (if applied 08-09 average $73,983)

	UG (Res)	UG (DE)	Masters	Doctoral		
I	$513,442	$246,363	$5,179	$0		
II	$0	$0	$38,471	$0		
III	$3,050,319	$359,557	$1,814,803	$1,480		
IV	$1,174,850	$423,183	$1,054,258	$0		**Modified (+5.5%)**
	$4,738,611	$1,029,103	$2,912,711	$1,480	**$8,681,905**	**$9,159,095**

Overall SCH/FTE Production Ratio: 296.03
Modified SCH/FTE Production Ratio: 280.61

Kimmel School

07-08 SCH Production (Fundable Resident and Distance Credit Hours)

	UG (Res)	UG (DE)	Masters	Doctoral	
I	0	0	0	0	
II	0	0	0	0	
III	7,350	609	585	0	
IV	484	0	0	0	
	7,834	609	585	0	**9,028**

07-08 FTE Production (with Undergraduate Cost Factor)

	UG (Res)	UG (DE)	Masters	Doctoral		
I	0.00	0.00	0.00	0.00		
II	0.00	0.00	0.00	0.00		
III	19.90	1.50	3.14	0.00		
IV	2.29	0.00	0.00	0.00		**Modified (+5.5%)**
	22.19	1.50	3.14	0.00	**26.83**	**28.31**

07-08 Instructional Salary Production (if applied 08-09 average $73,983)

	UG (Res)	UG (DE)	Masters	Doctoral		
I	$0	$0	$0	$0		
II	$0	$0	$0	$0		
III	$1,472,262	$332,924	$232,307	$0		
IV	$169,421	$0	$0	$0		**Modified (+5.5%)**
	$1,641,683	$332,924	$232,307	$0	**$1,984,964**	**$2,094,459**

Overall SCH/FTE Production Ratio: 336.49
Modified SCH/FTE Production Ratio: 318.90

Appendix H: Comparative SCH Data for Departments (Applying Modified Funding Formula)

Arts & Sciences

Department	07-08 SCH Production	Modified 07-08 FTE Production	Modified 07-08 Salary Production*	% of SCH Production	% of FTE and Salary Production	Modified Avg. SCH/FTE Production	Modified Avg. Class Size if 3-3 Load
Social Sciences							
Anthropology/Sociology	5,030	8.38	$619,978	6.3%	4.9%	600.24	33.3
Communication	8,861	16.96	$1,254,752	11.1%	10.0%	522.46	29.0
Political Science/Public Affairs	4,246	9.28	$686,562	5.3%	5.5%	457.54	25.4
Humanities							
English	14,164	26.62	$1,969,427	17.7%	15.7%	532.08	29.6
History	8,262	15.05	$1,113,444	10.3%	8.9%	548.97	30.5
Modern Foreign Languages	3,576	7.75	$573,368	4.5%	4.6%	461.42	25.6
Philosophy and Religion	3,767	6.16	$455,735	4.7%	3.6%	611.53	34.0
Sciences/Mathematics							
Biology	6,287	19.60	$1,450,067	7.9%	11.5%	320.77	17.8
Chemistry/Physics	8,588	25.27	$1,869,550	10.7%	14.9%	339.85	18.9
Geosciences/Natural Resources	5,889	14.96	$1,106,786	7.4%	8.8%	393.65	21.9
Mathematics/Computer Science	10,753	19.61	$1,450,807	13.4%	11.5%	548.34	30.5
Interdisciplinary	363	0.76	$56,227				
Other?	281						
Arts & Sciences Overall	**80,067**	**169.97**	**$12,574,891**			**471.07**	**26.2**

Business

Department	07-08 SCH Production	Modified 07-08 FTE Production	Modified 07-08 Salary Production*	% of SCH Production	% of FTE and Salary Production	Modified Avg. SCH/FTE Production	Modified Avg. Class Size if 3-3 Load
Acctg/Finance/Info Sys/Econ	11,857	27.05	$2,001,240	36.4%	35.5%	438.34	24.4
Bus Adm/Law/Sport (+Hosp/Tour)	8,786	19.46	$1,439,709	27.0%	25.5%	451.49	25.1
Global Management & Strategy	6,042	15.89	$1,175,590	18.5%	20.8%	380.24	21.1
Sales & Marketing (-Hosp/Tour)	3,420	7.56	$559,311	10.5%	9.9%	452.38	25.1
Entrepreneurship	2,472	6.26	$463,134	7.6%	8.2%	394.89	21.9
Business Overall	**32,577**	**76.22**	**$5,638,985**			**427.41**	**23.7**

Education & Allied Professions

Department	07-08 SCH Production	Modified 07-08 FTE Production	Modified 07-08 Salary Production*	% of SCH Production	% of FTE and Salary Production	Modified Avg. SCH/FTE Production	Modified Avg. Class Size if 3-3 Load
Elementary & Middle Grades Ed	5,949	14.25	$1,054,258	13.9%	12.3%	417.47	23.2
Educational Leadership & Founds	7,228	29.18	$2,158,824	16.8%	25.2%	247.70	13.8
Health, Phys Ed, & Recreation	8,946	19.79	$1,464,124	20.8%	17.1%	452.05	25.1
Human Services	10,438	27.25	$2,016,037	24.3%	23.5%	383.05	21.3
Psychology	10,375	25.50	$1,886,567	24.2%	22.0%	406.86	22.6
Educ & Allied Profs Overall	**42,936**	**116.01**	**$8,582,768**			**370.11**	**20.6**

Fine & Performing Arts

Department	07-08 SCH Production	Modified 07-08 FTE Production	Modified 07-08 Salary Production*	% of SCH Production	% of FTE and Salary Production	Modified Avg. SCH/FTE Production	Modified Avg. Class Size if 3-3 Load
Art & Design	7,489	22.43	$1,659,439	48.0%	49.1%	333.88	18.5
Music	6,152	18.01	$1,332,434	39.4%	39.4%	341.59	19.0
Stage & Screen	1,964	5.19	$383,972	12.6%	11.4%	378.42	21.0
Fine & Perf Arts Overall	**15,605**	**45.70**	**$3,381,023**			**341.47**	**19.0**

Health & Human Sciences

Department	07-08 SCH Production	Modified 07-08 FTE Production	Modified 07-08 Salary Production*	% of SCH Production	% of FTE and Salary Production	Modified Avg. SCH/FTE Production	Modified Avg. Class Size if 3-3 Load
Criminology & Criminal Justice	7,722	13.22	$978,055	22.2%	10.7%	584.11	32.5
Communicatn Sciences/Disorders	2,352	10.53	$779,041	6.8%	8.5%	223.36	12.4
Health Sciences	13,353	39.58	$2,928,247	38.4%	32.0%	337.37	18.7
Nursing	5,966	37.82	$2,798,037	17.2%	30.5%	157.75	8.8
Physical Therapy	1,644	9.32	$689,522	4.7%	7.5%	176.39	9.8
Social Work	3,702	13.35	$987,673	10.7%	10.8%	277.30	15.4
Health & Hum Sci Overall	**34,739**	**123.80**	**$9,159,095**			**280.61**	**15.6**

Kimmel School

Department	07-08 SCH Production	Modified 07-08 FTE Production	Modified 07-08 Salary Production*	% of SCH Production	% of FTE and Salary Production	Modified Avg. SCH/FTE Production	Modified Avg. Class Size if 3-3 Load
Construction Management	4,957	15.04	$1,112,704	54.9%	53.1%	329.59	18.3
Engineering Technology	4,071	13.27	$981,754	45.1%	46.9%	306.78	17.0
Kimmel School Overall	**9,028**	**28.31**	**$2,094,459**			**318.90**	**17.7**

Appendix I: SCH Production Breakdown by Department

Arts & Sciences

Anthropology/Sociology

07-08 SCH Production (Fundable Resident and Distance Credit Hours)

	UG (Res)	UG (DE)	Masters	Doctoral	
I	4,860	135	35	0	**5,030**

07-08 FTE Production (with Undergraduate Cost Factor)

	UG (Res)	UG (DE)	Masters	Doctoral		Modified (+5.5%)
I	7.54	0.19	0.21	0.00	**7.94**	**8.38**
						$619,978

Communication

07-08 SCH Production (Fundable Resident and Distance Credit Hours)

	UG (Res)	UG (DE)	Masters	Doctoral	
I	7,565	6	0	0	
III	1,290	0	0	0	
	8,855	6	0	0	**8,861**

07-08 FTE Production (with Undergraduate Cost Factor)

	UG (Res)	UG (DE)	Masters	Doctoral		
I	11.74	0.85	0.00	0.00		
III	3.49	0.00	0.00	0.00		Modified (+5.5%)
	15.23	0.85	0.00	0.00	**16.08**	**16.96**
						$1,254,752

Political Science/Public Affairs

07-08 SCH Production (Fundable Resident and Distance Credit Hours)

	UG (Res)	UG (DE)	Masters	Doctoral	
I	3,535	132	15	0	
III	0	0	564	0	
	3,535	132	579	0	**4,246**

07-08 FTE Production (with Undergraduate Cost Factor)

	UG (Res)	UG (DE)	Masters	Doctoral		
I	5.49	0.19	0.09	0.00		
III	0.00	0.00	3.03	0.00		Modified (+5.5%)
	5.49	0.19	3.12	0.00	**8.80**	**9.28**
						$686,562

English

07-08 SCH Production (Fundable Resident and Distance Credit Hours)

	UG (Res)	UG (DE)	Masters	Doctoral	
I	13,323	78	702	16	
III	30	0	15	0	
	13,353	78	717	16	**14,164**

07-08 FTE Production (with Undergraduate Cost Factor)

	UG (Res)	UG (DE)	Masters	Doctoral		
I	20.68	0.11	4.14	0.14		
III	0.08	0.00	0.08	0.00		**Modified (+5.5%)**
	20.76	0.11	4.22	0.14	**25.23**	**26.62**
						$1,969,427

History

07-08 SCH Production (Fundable Resident and Distance Credit Hours)

	UG (Res)	UG (DE)	Masters	Doctoral	
I	7,847	48	306	7	
III	54	0	0	0	
	7,901	48	306	7	**8,262**

07-08 FTE Production (with Undergraduate Cost Factor)

	UG (Res)	UG (DE)	Masters	Doctoral		
I	12.18	0.07	1.81	0.06		
III	0.15	0.00	0.00	0.00		**Modified (+5.5%)**
	12.33	0.07	1.81	0.06	**14.27**	**15.05**
						$1,113,444

Modern Foreign Languages

07-08 SCH Production (Fundable Resident and Distance Credit Hours)

	UG (Res)	UG (DE)	Masters	Doctoral	
II	3,564	0	0	0	
III	12	0	0	0	
	3,576	0	0	0	**3,576**

07-08 FTE Production (with Undergraduate Cost Factor)

	UG (Res)	UG (DE)	Masters	Doctoral		
II	7.32	0.00	0.00	0.00		
III	0.03	0.00	0.00	0.00		**Modified (+5.5%)**
	7.35	0.00	0.00	0.00	**7.35**	**7.75**
						$573,368

Philosophy and Religion

07-08 SCH Production (Fundable Resident and Distance Credit Hours)

	UG (Res)	UG (DE)	Masters	Doctoral	
I	3,575	189	3	0	**3,767**

07-08 FTE Production (with Undergraduate Cost Factor)

	UG (Res)	UG (DE)	Masters	Doctoral		Modified (+5.5%)
I	5.55	0.27	0.02	0.00	**5.84**	**6.16**
						$455,735

Biology

07-08 SCH Production (Fundable Resident and Distance Credit Hours)

	UG (Res)	UG (DE)	Masters	Doctoral	
III	5,654	60	561	12	**6,287**

07-08 FTE Production (with Undergraduate Cost Factor)

	UG (Res)	UG (DE)	Masters	Doctoral		Modified (+5.5%)
III	15.31	0.15	3.01	0.11	**18.58**	**19.60**
						$1,450,067

Chemistry/Physics

07-08 SCH Production (Fundable Resident and Distance Credit Hours)

	UG (Res)	UG (DE)	Masters	Doctoral	
II	0	0	2	0	
III	8,117	210	247	12	
	8,117	210	249	12	**8,588**

07-08 FTE Production (with Undergraduate Cost Factor)

	UG (Res)	UG (DE)	Masters	Doctoral		
II	0.00	0.00	0.01	0.00		
III	21.98	0.52	1.33	0.11		Modified (+5.5%)
	21.98	0.52	1.34	0.11	**23.95**	**25.27**
						$1,869,550

Geosciences and Natural Resources

07-08 SCH Production (Fundable Resident and Distance Credit Hours)

	UG (Res)	UG (DE)	Masters	Doctoral	
I	1,549	0	0	0	
III	4,331	0	9	0	
	5,880	0	9	0	**5,889**

07-08 FTE Production (with Undergraduate Cost Factor)

	UG (Res)	UG (DE)	Masters	Doctoral		
I	2.40	0.00	0.00	0.00		
III	11.73	0.00	0.05	0.00		**Modified (+5.5%)**
	14.13	0.00	0.05	0.00	**14.18**	**14.96**
						$1,106,786

Mathematics/Computer Science

07-08 SCH Production (Fundable Resident and Distance Credit Hours)

	UG (Res)	UG (DE)	Masters	Doctoral	
I	9,683	21	216	0	
III	833	0	0	0	
	10,516	21	216	0	**10,753**

07-08 FTE Production (with Undergraduate Cost Factor)

	UG (Res)	UG (DE)	Masters	Doctoral		
I	15.03	0.03	1.27	0.00		
III	2.26	0.00	0.00	0.00		**Modified (+5.5%)**
	17.29	0.03	1.27	0.00	**18.59**	**19.61**
						$1,450,807

Business

Accounting, Finance, Information Systems, and Economics

07-08 SCH Production (Fundable Resident and Distance Credit Hours)

	UG (Res)	UG (DE)	Masters	Doctoral	
II	10,576	198	1,083	0	**11,857**

07-08 FTE Production (with Undergraduate Cost Factor)

	UG (Res)	UG (DE)	Masters	Doctoral		
II	21.71	0.37	3.56	0.00	**25.64**	**Modified (+5.5%)**
						27.05
						$2,001,240

Business Administration and Law and Sport Management (+ Hospitality and Tourism)

07-08 SCH Production (Fundable Resident and Distance Credit Hours)

	UG (Res)	UG (DE)	Masters	Doctoral	
II	8,068	342	376	0	**8,786**

07-08 FTE Production (with Undergraduate Cost Factor)

	UG (Res)	UG (DE)	Masters	Doctoral		Modified (+5.5%)
II	16.57	0.64	1.24	0.00	**18.45**	**19.46**
						$1,439,709

Global Management and Strategy

07-08 SCH Production (Fundable Resident and Distance Credit Hours)

	UG (Res)	UG (DE)	Masters	Doctoral	
II	3,744	135	2,163	0	**6,042**

07-08 FTE Production (with Undergraduate Cost Factor)

	UG (Res)	UG (DE)	Masters	Doctoral		Modified (+5.5%)
II	7.69	0.25	7.12	0.00	**15.06**	**15.89**
						$1,175,590

Sales and Marketing (- Hospitality and Tourism)

07-08 SCH Production (Fundable Resident and Distance Credit Hours)

	UG (Res)	UG (DE)	Masters	Doctoral	
II	3,153	126	141	0	**3,420**

07-08 FTE Production (with Undergraduate Cost Factor)

	UG (Res)	UG (DE)	Masters	Doctoral		Modified (+5.5%)
II	6.47	0.24	0.46	0.00	**7.17**	**7.56**
						$559,311

Entrepreneurship

07-08 SCH Production (Fundable Resident and Distance Credit Hours)

	UG (Res)	UG (DE)	Masters	Doctoral	
II	1,527	222	723	0	**2,472**

07-08 FTE Production (with Undergraduate Cost Factor)

	UG (Res)	UG (DE)	Masters	Doctoral		
						Modified (+5.5%)
II	3.14	0.41	2.38	0.00	**5.93**	**6.26**
						$463,134

Education and Allied Professions

Elementary and Middle Grades Education

07-08 SCH Production (Fundable Resident and Distance Credit Hours)

	UG (Res)	UG (DE)	Masters	Doctoral	
II	3,844	591	581	0	
III	792	99	42	0	
	4,636	690	623	0	**5,949**

07-08 FTE Production (with Undergraduate Cost Factor)

	UG (Res)	UG (DE)	Masters	Doctoral		
II	7.89	1.10	1.91	0.00		
III	2.14	0.24	0.23	0.00		**Modified (+5.5%)**
	10.03	1.34	2.14	0.00	**13.51**	**14.25**
						$1,054,258

Educational Leadership and Foundations

07-08 SCH Production (Fundable Resident and Distance Credit Hours)

	UG (Res)	UG (DE)	Masters	Doctoral	
II	1,770	57	3,855	1069	
III	384	0	93	0	
	2,154	57	3,948	1,069	**7,228**

07-08 FTE Production (with Undergraduate Cost Factor)

	UG (Res)	UG (DE)	Masters	Doctoral		
II	3.63	0.11	12.68	9.70		
III	1.04	0.00	0.50	0.00		**Modified (+5.5%)**
	4.67	0.11	13.18	9.70	**27.66**	**29.18**
						$2,158,824

Health, Physical Education and Recreation

07-08 SCH Production (Fundable Resident and Distance Credit Hours)

	UG (Res)	UG (DE)	Masters	Doctoral	
II	8,166	375	243	0	
III	144	0	18	0	
	8,310	375	261	0	**8,946**

07-08 FTE Production (with Undergraduate Cost Factor)

	UG (Res)	UG (DE)	Masters	Doctoral		
II	16.77	0.70	0.80	0.00		
III	0.39	0.00	0.10	0.00		**Modified (+5.5%)**
	17.16	0.70	0.90	0.00	**18.76**	**19.79**
						$1,464,124

Human Services

07-08 SCH Production (Fundable Resident and Distance Credit Hours)

	UG (Res)	UG (DE)	Masters	Doctoral	
II	4,169	2,374	3,642	29	
III	156	62	6	0	
	4,325	2,436	3,648	29	**10,438**

07-08 FTE Production (with Undergraduate Cost Factor)

	UG (Res)	UG (DE)	Masters	Doctoral		
II	8.56	4.43	11.98	0.26		
III	0.42	0.15	0.03	0.00		**Modified (+5.5%)**
	8.98	4.58	12.01	0.26	**25.83**	**27.25**
						$2,016,037

Psychology

07-08 SCH Production (Fundable Resident and Distance Credit Hours)

	UG (Res)	UG (DE)	Masters	Doctoral	
I	8,085	420	1,870	0	**10,375**

07-08 FTE Production (with Undergraduate Cost Factor)

	UG (Res)	UG (DE)	Masters	Doctoral		
I	12.55	0.59	11.03	0.00	**24.17**	**Modified (+5.5%)**
						25.50
						$1,886,567

Fine and Performing Arts

Art and Design

07-08 SCH Production (Fundable Resident and Distance Credit Hours)

	UG (Res)	UG (DE)	Masters	Doctoral	
III	6,898	204	387	0	**7,489**

07-08 FTE Production (with Undergraduate Cost Factor)

	UG (Res)	UG (DE)	Masters	Doctoral		Modified (+5.5%)
III	18.68	0.50	2.08	0.00	**21.26**	**22.43**
						$1,659,439

Music

07-08 SCH Production (Fundable Resident and Distance Credit Hours)

	UG (Res)	UG (DE)	Masters	Doctoral	
III	5,944	47	161	0	**6,152**

07-08 FTE Production (with Undergraduate Cost Factor)

	UG (Res)	UG (DE)	Masters	Doctoral		Modified (+5.5%)
III	16.09	0.12	0.86	0.00	**17.07**	**18.01**
						$1,332,434

Stage and Screen

07-08 SCH Production (Fundable Resident and Distance Credit Hours)

	UG (Res)	UG (DE)	Masters	Doctoral	
I	348	0	0	0	
III	1,559	51	6	0	
	1,907	51	6	0	**1,964**

07-08 FTE Production (with Undergraduate Cost Factor)

	UG (Res)	UG (DE)	Masters	Doctoral		
I	0.54	0.00	0.00	0.00		
III	4.22	0.13	0.03	0.00		Modified (+5.5%)
	4.76	0.13	0.03	0.00	**4.92**	**5.19**
						$383,972

Health and Human Sciences

Criminology and Criminal Justice

07-08 SCH Production (Fundable Resident and Distance Credit Hours)

	UG (Res)	UG (DE)	Masters	Doctoral	
I	4,468	2,360	12	0	
III	78	804	0	0	
	4,546	3,164	12	0	**7,722**

07-08 FTE Production (with Undergraduate Cost Factor)

	UG (Res)	UG (DE)	Masters	Doctoral		
I	6.94	3.33	0.07	0.00		
III	0.21	1.98	0.00	0.00		**Modified (+5.5%)**
	7.15	5.31	0.07	0.00	**12.53**	**13.22**
						$978,055

Communication Sciences and Disorders

07-08 SCH Production (Fundable Resident and Distance Credit Hours)

	UG (Res)	UG (DE)	Masters	Doctoral	
III	960	33	1,359	0	**2,352**

07-08 FTE Production (with Undergraduate Cost Factor)

	UG (Res)	UG (DE)	Masters	Doctoral		
III	2.60	0.08	7.30	0.00	**9.98**	**10.53**
						$779,041

Health Sciences

07-08 SCH Production (Fundable Resident and Distance Credit Hours)

	UG (Res)	UG (DE)	Masters	Doctoral	
II	0	0	159	0	
III	11,586	1,036	570	2	
	11,586	1,036	729	2	**13,353**

07-08 FTE Production (with Undergraduate Cost Factor)

	UG (Res)	UG (DE)	Masters	Doctoral		
II	0.00	0.00	0.52	0.00		
III	31.37	2.55	3.06	0.02		**Modified (+5.5%)**
	31.37	2.55	3.58	0.02	**37.52**	**39.58**
						$2,928,247

Nursing

07-08 SCH Production (Fundable Resident and Distance Credit Hours)

	UG (Res)	UG (DE)	Masters	Doctoral	
IV	3,353	1,328	1,285	0	**5,966**

07-08 FTE Production (with Undergraduate Cost Factor)

	UG (Res)	UG (DE)	Masters	Doctoral		**Modified (+5.5%)**
IV	15.88	5.72	14.25	0.00	**35.85**	**37.82**
						$2,798,037

Physical Therapy

07-08 SCH Production (Fundable Resident and Distance Credit Hours)

	UG (Res)	UG (DE)	Masters	Doctoral	
III	0	0	1,644	0	**1,644**

07-08 FTE Production (with Undergraduate Cost Factor)

	UG (Res)	UG (DE)	Masters	Doctoral		**Modified (+5.5%)**
III	0.00	0.00	8.83	0.00	**8.83**	**9.32**
						$689,522

Social Work

07-08 SCH Production (Fundable Resident and Distance Credit Hours)

	UG (Res)	UG (DE)	Masters	Doctoral	
III	2,604	102	996	0	**3,702**

07-08 FTE Production (with Undergraduate Cost Factor)

	UG (Res)	UG (DE)	Masters	Doctoral		**Modified (+5.5%)**
III	7.05	0.25	5.35	0.00	**12.65**	**13.35**
						$987,673

Kimmel School

Construction Management

07-08 SCH Production (Fundable Resident and Distance Credit Hours)

	UG (Res)	UG (DE)	Masters	Doctoral	
III	4,642	3	312	0	**4,957**

07-08 FTE Production (with Undergraduate Cost Factor)

	UG (Res)	UG (DE)	Masters	Doctoral		
III	12.57	0.01	1.68	0.00	**14.26**	**Modified (+5.5%)**
						15.04
						$1,112,704

Engineering Technology

07-08 SCH Production (Fundable Resident and Distance Credit Hours)

	UG (Res)	UG (DE)	Masters	Doctoral	
III	2,708	606	273	0	
IV	484	0	0	0	
	3,192	606	273	0	**4,071**

07-08 FTE Production (with Undergraduate Cost Factor)

	UG (Res)	UG (DE)	Masters	Doctoral		
III	7.33	1.49	1.47	0.00		
IV	2.29	0.00	0.00	0.00		**Modified (+5.5%)**
	9.62	1.49	1.47	0.00	**12.58**	**13.27**
						$981,754

Appendix J: College FTE Earned and Allocated*

College	08-09 Regular Faculty FTE	08-09 Part-time Faculty FTE	08-09 Total Allocated FTE	07-08 Earned FTE	Ratio FTE Earned / Allocated
Arts & Sciences	183.56	1.00	184.56	169.97	.92/1
Business	72.58	1.00	73.58	76.22	1.04/1
Education & Allied Professions	90.92	1.00	91.92	116.01	1.26/1
Fine & Performing Arts	57.59	1.00	58.59	45.70	.78/1
Health & Human Sciences	91.96	1.00	92.96	123.80	1.33/1
Kimmel School	33.50	1.00	34.50	28.31	.82/1
Total for Colleges	530.11	6.00	536.11	559.95	1.04/1
Other Assigned			24.69		
Other Unassigned			21.45		
WCU Overall (Total FTE Allocation to WCU in 08-09)			582.25		

Appendix K: College Instructional Salary Earned and Allocated*

	Direct Allocations		Indirect Allocations**				
College	08-09 Regular Faculty	08-09 Part-Time Faculty	08-09 Distance Education	08-09 Graduate Assistants	08-09 Total Allocated Salary	07-08 Earned Salary	Ratio Salary Earned / Allocated
Arts & Sciences	$10,822,465	$332,000	$103,415	$632,702	$11,890,582	$12,574,891	1.06/1
Business	$6,772,128	$140,000	$89,895	$60,000	$7,062,023	$5,638,985	.80/1
Education & Allied Professions	$5,957,895	$260,000	$628,026	$457,750	$7,303,671	$8,582,768	1.18/1
Fine & Performing Arts	$3,692,536	$250,000	$24,000	$121,750	$4,088,286	$3,381,023	.83/1
Health & Human Sciences	$6,605,883	$180,000	$371,231	$228,000	$7,385,114	$9,159,095	1.24/1
Kimmel School	$2,905,081	$40,000	$39,000	$104,000	$3,088,081	$2,094,459	.68/1
Total for Colleges	$36,755,988	$1,202,000	$1,255,567	$1,604,202	$40,817,757	$41,426,781	1.01/1
Other Assigned					$2,049,398		
Other Unassigned					$101,123		
Additional Distance Ed					-$255,567		
Other Assigned Graduate Assistant					$395,798		
WCU Overall (Total Instructional Salary Allocation to WCU in 08-09)					$43,108,509		

*FTE and salary earned in 07-08, allocated in 08-09. (Applying only 1-year earned at this time.) Allocations may not represent actual expenditures.
**Distance Education reported allocations exceeding $1,000,000 budget; Graduate School reported allocations below $2,000,000 budget
(GA allocations represent final allocations to colleges, after awards adjusted across colleges)