

Budgeting for Excellence in Challenging Financial Times: One Canadian Perspective

- Fred Hall, Vice-Provost (Graduate Education) and Dean of Graduate Studies, University of Calgary
- Context: Size, and How challenging?
- Office Operating Budget
- Scholarship/Support Budget



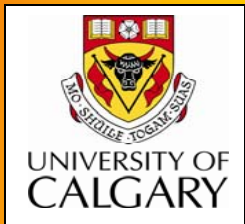
University of Calgary

- Founded only 42 years ago
- Graduate students
 - 4200 full-time
 - 1200 part-time
 - 50+ programs
- 23,000 undergraduates
- 1700 faculty



Context: How Challenging

- Alberta has treated universities well
 - 6% operating budget increase for 3 years, 2007 – 20010
 - 0% change for next 3 years
 - Additional funding for enrolment expansion in approved areas
- But University budget woes mean
 - 0% in 2009-10 for budget envelope
 - Potential in-year cut of 2 – 3%



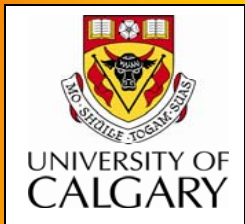
Office Operating Budget

- Roughly \$2 million; 84% staff costs
- 0% (or worse) increase for 4 years
- 6% salary increases annually
 - 25% increase in salary budget
 - Implies lose ¼ of staff?
- Non-staff 22% of operating budget
 - External examiners 44% of that
 - Mandatory contingency another 14%



Response re operating budget

- Informed staff of outlook
 - but said no staff cuts this year
- Working to improve procedures
 - Avoid duplication with programs
 - Admission processes
 - Allow programs to admit on behalf of FGS
 - Don't double-check all programs' work
 - Electronic data transfer from admission
 - On-line progress reports



Scholarship/support budget

- \$6.4 million disbursed by FGS to programs
- Allocations to programs were historical
- Uses were restricted: \$4100 per student, or $\frac{1}{2}$ or $\frac{1}{4}$ of that amount
- All agreed that the allocations needed a better basis



Allocation criteria (1)

- Each program's share of expected funded completions
- Numbers of students
 - Funded above \$5800; moving up
 - Data from G13 GSFS
- Completion rates for M, D separately
 - At Calendar time limit (4, 6 years)



Allocation criteria (2)

- Each program's share on the average of four criteria, standardized
- % of eligible students holding a federal tri-council scholarship
- % of students rating program in top two categories on 5 summary Qs on CGPSS
- % of Cdn students not from Calgary
- Reputation rating in unit reviews



Other considerations

- No program will decrease by $>10\%$ per year
 - None can increase by $>10\%$ per year
- Constraints loosened on uses of funds; left to programs
- Criteria and rationale discussed at Graduate Council
- Modifications to implementation and relative weights in second year



Consequences

- Awareness of completion rates and of other criteria
 - and of need to improve them
- Changes in graduate programs to accomplish these
- Discussions at Council of these program quality indicators
- A way of effecting change in programs without additional funds.

