

Introduction

For the last several years, the Academic Senate's Council on Planning and Budget (CPB) has been working to better understand the implications and impact of the Bruin Budget Model (BBM). As with any major, complex change to an institution, there are risks of unintended consequences or adverse incentives. To help monitor the impact of the BBM, CPB formed a Budget Model Working Group (BMWG) in 2019. Since then, this group has issued several reports on the BBM and made recommendations concerning how to understand the impact of the BBM on UCLA's mission.

There are several limitations to this effort, including the difficulty measuring many of the aspects of UCLA's mission (e.g. creativity, rigor, and the student experience, etc.), important resources or parts of the university that lie outside the model (e.g. space and physical plant, auxiliaries, etc.), and externalities that might take years to manifest (e.g. reputation, alumni connection, etc.).

However, based on careful study of the BBM, CPB has developed a series of metrics that we believe will help capture the impact of the new model on key aspects of UCLA's mission. We followed a two-prong strategy, creating a broader set of metrics (link), and then identifying a dozen key metrics that we think are particularly useful in monitoring the impact of the model (presented below).

We have worked with APB (in partnership with other campus units) to develop these dashboards. Access to these dashboards will be restricted to UCLA logins in the first year of the model. Our key dashboards are presented [link, or on the same document], along with a brief introduction to each.

General Fund Supplement

In June 2020, CPB issued a document titled "Discussion of New Budget Model, along with Recommendations." Recommendation 5 of that document urged public documentation and academic justification for the use of strategic funds, as well as the adoption of accountability mechanisms on the central administration's use of these funds. Later that same year, CPB issued a report specifically addressing the need for transparency, predictability, and accountability in the General Fund Supplement.

1. **For fiscal year, and as percent change from the prior fiscal year, dollars and percent of total EVCP Central Investment Fund allocated to General Fund Supplement, central units, academic and student support units, Chancellor and EVCP new initiatives and commitments, and the EVCP's funding choices from her letter identifying campus priorities, with a filter for focus on academics, research, other.**
2. In addition, in light of concerns related to administrative costs: **By fiscal year and as percent change from the prior fiscal year, total and percentage of EVCP Central Investment Fund allocated to salary plus administration costs above dean level (e.g., Chancellor, Vice-Chancellors, Vice-Provosts, and their offices).**

Other revenue generation

One of the chief justifications of moving to the BBM is to help incentivize the pursuit of additional revenue.

3. **For the fiscal year and as a percent change from the prior fiscal year, direct costs going to the research teams with contracts and/or grants and Indirect Cost Recovery from contracts and grants, for each total school-wide, and also by each academic unit (school, college division).**

4. **For the fiscal year and as percent change from the prior fiscal year, new dollars in non-traditional areas in total and for each of the eight identified non-traditional areas by amount and percent of total new dollars, with a filter for academic unit (school, college division).¹**

Impact on undergraduate and graduate education

In our June 2020 report, we also noted concerns that the new budget model might affect incentives to invest in high-quality teaching, potentially leading to "damage to reputation, 'pandering' teaching, grade inflation, and cutting of teaching resources." After further discussion, CPB recommends the following specific dashboards, with **data reported by each academic year and as percent change by year, UCLA-wide, upper- and lower-division, and also by each academic unit (School or college division at the decanal level).**

5. **The arithmetic average of median grades for undergraduate courses offered**
6. **Undergraduate primary courses taught by ladder faculty instructor of record: sum of SCH and as proportion of total UCLA undergraduate SCH.**
7. **Undergraduate courses with enrollment of 1-5, 6-20, 21-50, 51-100, and more than 100: sum of SCH and proportion of total UCLA undergraduate SCH for courses.**
8. **From the Senior Survey, percent "satisfied" or "very satisfied" with Availability of courses in major required for graduation.**
9. **Four-year and five-year graduation rates of students who entered as freshmen/Two-year and three-year graduation rates of students who entered as transfers; variation by international, domestic non-resident race/ethnicity, and domestic race/ethnicity, by gender, and by Pell.**

In addition, because the BBM might impact the incentives for units to share courses across budgetary units, we recommend monitoring the availability of cross-listed courses... particularly courses offered across units:

10. **For the academic year and as percent change from the prior academic year, for undergraduate courses not cross listed, coursed cross listed within same academic unit (school, college division), and courses cross listed across academic units (school, college division), number and percent of courses and SCH and percent SCH.**

At the graduate level, we would add two additional measures. The first would measure the admissions statistics of the programs and the second would measure timely degree completion. These data would again be **reported by academic year (and percent change from the prior year), UCLA-wide, and also by each academic unit (School or college division at the decanal level). In addition, the data should offer a filter for type of graduate degree.²**

11. **Number of applicants for admission, number and percent of applicants admitted, and number and percent of those admitted who enroll**
12. **Number and percent of students with timely degree completion.**

¹ The most recent written report on BBM (UCLA New Bruin Budget Model (BBM) FAQ, March 2021) identifies eight areas for non-traditional revenue growth; specifically, summer, Self-Supporting Graduate Professional Degree Programs (SSGPDP), research, new ventures, Indirect Cost Recovery (ICR), gifts and endowments, patent income, and sales and services (FAQ, March 2021, 5.2, 5.5).

² The four types of graduate degree we are using are as follows: PhD, academic master's, professional master's, and self-supporting professional graduate degree program. Three of the SSGPDP programs offer a professional doctorate and all the rest offer a professional master's. Ideally, these would allow filtering by **international, domestic non-resident race/ethnicity, domestic race/ethnicity, and by gender.**