

Date: March 18, 2022

To: Jessica Cattelino, Chair, UCLA Academic Senate
Evelyn Blumenberg, Chair, Council on Planning and Budget

CC: Jayathi Murthy, Dean Henry Samueli School of Engineering and Applied Science

From: Faculty Executive Committee (FEC), Henry Samueli School of Engineering
and Applied Sciences (HSSEAS) – Transmitted by Yoram Cohen, FEC Chair

Re: Bruin Budget Model

We are writing to express our concern regarding the proposed Bruin Budget Model. We concur with the need to improve and modernize the budget model. This is a laudable goal and as stated in the BBM White Paper (BHP), "...the current budget model [lacks] precise resource-allocation rationale." It is also our understanding that the proposed approach will be built upon the current funding levels and primarily adjust fund allocations to different campus units based upon additional activity.

As a result, the proposed BBM perpetuates a significant portion of legacy funding, leaving in place the allocations that the BBM White Paper specifically states lack rationale. We are concerned that the BBM will lock in past allocations that clearly are viewed as being in need of refinement. In this regard, it is imperative that unit activity measures and funding models that are transparent and rational. The absence of transparency regarding current and future unit activity metrics and funding undermines our confidence that funds would be used equitably for the support of students, faculty and various unit activities. Here we note that the current distribution of funds among campus units appears to be based on accretion over decades without clear strategic foresight. For some units, the current (baseline) budget will constitute most of their budget for many years to come; hence inequities in funding have significant consequences. Also, the proposed budget cuts are being applied equally to all units percentage-wise, even though the baseline funding is uneven which will further exacerbate the inequity.

UCLA is confronted with the present situation of inequities in funding per student among units, which would be cemented, not corrected, by the proposed BBM. To illustrate the problem, in the period between 2004-5 and 2019-20, some units received substantial *increases* in General Funds per student, while for other units there was a substantial *decrease* in received General Funds per student.¹ These non-strategic trends exacerbated already unequal allocations of funding per student. Furthermore, since units having high activity will become more dependent on activity, the same students that are underfunded, on a per-capita basis, will be simultaneously subjected to larger year-to-year uncertainties in unit resources. The reasons for, and implications of, differences in support for students in the different majors are currently opaque. While some inequities might be ultimately justifiable, the current ones are the outcome of an opaque, apparently *non-strategic* historical incremental funding model. Therefore, we propose that before cementing the existing inequities, a campus-wide study should be undertaken to assess the budgetary

¹ BBM White Paper, page 10-11; Figure 5.

inequities regarding per-student funding in the different units and propose a rational approach to addressing them in the future BBM. To its credit, the BBM White Paper does acknowledge the need to address equity issues.² However, the BBM White Paper does not provide an actual plan for addressing these issues.

In order to address the above issues, we urge our campus leadership to form and convene a committee of stakeholders, representative from the CPB and from the CFO office to develop a plan for progress toward equitable distribution of general funds (per student) that is based on justifiable and quantifiable metrics, rather than historical allocations. It is our view that it is inappropriate to implement a new budget model using old allocations that lacked a precise resource allocation rationale. Such a committee should analyze the existing inequities, recommend a more ideal GFS allocation, develop, vet, as well as explain and justify activity metrics, forecast the impact of the BBM on different campus units, and design a transition to a BBM that caters to the needs of students in different campus units while still serving students equitably. While it will be impossible to satisfy everyone, we owe it to our students to increase the transparency and fairness of the fund allocation and avoid the pitfall of accepting legacy funding inequities as they stand.

² BBM White Paper, footnote 36.

Rosalez, Adriana

From: Yoram Cohen <profyc@gmail.com>
Sent: Saturday, March 19, 2022 2:12 PM
To: Cattelino, Jessica; Blumenberg, Evelyn; JAYATHI MURTHY
Cc: Anderson, Steven; Freymiller, Earl G.; Heilemann, Marysue; Lazarus, Michael; Gregory Leazer; Lewis, Jeffrey B.; Lunenfeld, Peter B.; Panofsky, Aaron; Schwartz, Joanna; Sugar, Catherine A.; Upton, Elizabeth; Whitson, Jennifer; Cattelino, Jessica; Roy, Ananya; Kreiman, Jody E.; de Stefano, April; Rosalez, Adriana; edellangelica@mednet.ucla.ed; Groeling, Tim; Atkeson, Andrew Granger; eblumenb@ucla.ed; Guo, Ming; Zatz, Noah; Feller, Elizabeth; Dell'Angelica, Esteban; Roth, Jeff; Lee-Garcia, Rebecca; Glassman, Kate; RICHARD WESEL; Chen, Irene A.; ANDREA M KASKO
Subject: Bruin Budget Model
Attachments: BBM letter_EngFEC_March182022.pdf

TO: Jessica Cattelino, Chair, UCLA Academic Senate
Evelyn Blumenberg, Chair, Council on Planning and Budget

CC: Gregg Goldman - Vice-Chancellor and Chief Financial Officer
Jeff Roth - Associate Vice Chancellor for Academic Planning and Budget
Jayathi Murthy - Dean, Henry Samueli School of Engineering and Applied Science

I am writing you about concerns expressed regarding the Bruin Budget Model (BBM) by the Faculty Executive Committee (FEC) of the Henry Samueli School of Engineering and Applied Science.

Our FEC met and discussed the BBM White Paper. Based on discussions by FEC members, the attached letter was prepared, which was unanimously approved by the FEC, describing the concerns and suggestions by our FEC. We all agreed that having a BBM that will address the needs of the various campus units in a structured manner and with quantifiable and justifiable metrics would be welcome progress. As detailed in the letter, there is concern that the proposed BBM approach will cement inequities that could remain with various units for years to come. As our letter proposes, we hope to be given the opportunity to engage with all stakeholders to refine the proposed BBM approach.

Regards,

Yoram Cohen

Yoram Cohen

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