

Financial Futures Committee - Revenue Workgroups

See Revenue Types Analysis Table for Description: restrictions, primary uses, approval authority, governance, etc

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| <p>State Appropriation: including Targeted Programs (i.e. ETIC), Lottery</p> <p>Committee Chair - Michael Fung</p> <p>Committee Members: Kevin Reynolds Larry Wallack Ren Su Johnathan Uto Brooke Jacobsen</p> <p>(staff - Deb Janikowski & Andria Johnson)</p> | <ul style="list-style-type: none"> • Although we can set a goal for the amount PSU receives from the state, and we can “make our case” for this money by targeting it for specific State sanctioned purposes, there are too many variables beyond our control to assume support will be allocated to us based on this request. • PSU gets less than its fair share of state support, based on our size and productivity. • What do we do about state-wide signature programs at Portland State if they are de-funded by the state? | <p>This an equity of state support issue, therefore doing what we can to maintain the quality and stature of our programs and institutions are our incentive.</p> | <p>De-funding of state-wide signature programs would be a disincentive for PSU’s continued participation in them.</p> | <ol style="list-style-type: none"> 1. As an anchor institution that subscribes to the belief that investing in higher education is the state’s best strategy for continued social and economic development, Portland State University (PSU) recognizes its responsibility to Oregon’s citizens and will continue to be a strong advocate for the continued funding of Oregon’s University System in general, and PSU in particular. 2. As Oregon’s only Urban Research University, PSU plays a unique developmental role in the state and will continue to advocate forcefully for its “fair share” of state appropriations and for increased appropriations should the state’s fiscal climate improve. |

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| | | | | <p>3. As a host institution for several of Oregon’s signature “targeted” programs, PSU will continue to be an aggressive advocate for the secure funding of these statewide investments in critical areas of research, training and economic development.</p> |

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| <p>Tuition & Fee Remission: includes summer session, differential, self-support, resource fees, Financial Aid</p> <p>Committee Chair - Kevin Reynolds & Michael Fung</p> <p>Committee Members: Marvin Kaiser Jackie Balzer Barbara Sestak Jil Heimensen Stan Hillman Ray Johnson Kathi Ketcheson Sandra Freels</p> <p>(staff – Robin Michell, Cher Wildenborg & David Burgess)</p> | <p>Inload and self support for credit courses to be managed similarly where all tuition revenue is included in central resources.</p> <p>What will happen to programs that are not fiscally prudent?</p> <p>How will shift of budget model occur and adjustments made from historical budgets to new model?</p> <p>Are all factors equal in value?</p> <p>Some programs may have costs in excess of tuition.</p> <p>How will special needs of programs (computer labs, facilities, etc.) be addressed in budget model?</p> | <p>A new budget model will contribute to transparency and incentivize units.</p> <p><u>Current:</u> knowledge of how system works</p> <p><u>Proposed:</u> idea that RAM model does not stop at the front door but that allocations to programs consider that different programs cost more and bring in more dollars is reflected as part of new budget model</p> <p><u>Current:</u> allows opportunities to develop programs at the unit level</p> <p><u>Proposed:</u> greater oversight by university for fiscal analysis</p> | <p><u>Current:</u> status quo is familiar and gives some control to units</p> <p><u>Proposed:</u> loss of entrepreneurship</p> <p><u>Current:</u> not all programs treated same</p> <p><u>Proposed:</u> once a year approval process will inhibit entrepreneurship</p> <p><u>Proposed:</u> units lose opportunities to create discretionary funds</p> | <p><u>Overarching Tuition Principle:</u> The University will use one budget model for credit courses which adequately covers full cost to deliver programs.</p> <p>A new budget model will incent units based on various factors such as: sch, degrees awarded, retention, research activity, program cost, RAM cell funding, and strategic initiatives.</p> <p><u>Base Tuition Principle:</u> Tuition should relate to the cost (direct and indirect) to deliver programs.</p> <p>The University will receive and manage all tuition. Definition of all tuition is: inload, self support for credit, summer, and resource fees.</p> |

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| | <p>If differential tuition increases are result of market demand, and a higher tuition amount than cost to deliver program is assessed, should the additional revenue be allocated to programs that produce deficits? What are the criteria that will allow subsidized programs to exist?</p> | <p><u>Current:</u> UG differential tuition only charged to admitted students (generally, junior and senior levels) through admission process and does not impact lower division students</p> <p><u>Current:</u> units are able to help support activities required for majors that the university does not fund</p> <p><u>Proposed:</u> greater analysis of what programs cost and opportunity to fund appropriately.</p> <p><u>Proposed:</u> differential tuition might allow shift of base tuition to other programs</p> | <p>Possible loss of lower division students to community college and less first time freshmen as tuition rates increase.</p> <p>If differential tuition leads to weakening of core liberal arts programming, there may be a decrease in out of state enrollment.</p> <p><u>Current:</u> cap on UG tuition does not allow differential tuition to be initiated</p> <p><u>Proposed:</u> potential impact on students who cannot afford higher tuition from entering programs that have it; possible negative impact on enrollment patterns.</p> | <p><u>Differential Tuition Principle:</u> The University will receive and manage differential tuition. The University will partner with units to set tuition rates reflective of market demand and total program costs, to the extent prudent and feasible.</p> |

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| | <p>Increasing summer session enrollment.</p> <p>Attracting non-PSU students to summer programs.</p> <p>Intensive formats (8 week, 9 week) but puts additional demands on space. Moving to an 11-week term would address this issue, but would reduce the attractiveness of summer programs for non PSU students (public school teacher and students from semester schools).</p> <p>Self Support programs will assume higher rate of overhead expense.</p> <p>Current method of classroom scheduling to be evaluated based on programmatic needs and efficient use of space.</p> | <p>The ability to offer intensive courses and other nontraditional offerings that cannot be taught during the academic year.</p> <p><u>Current</u>: opportunities for different type of courses or experimental courses</p> <p><u>Proposed</u>: larger number of required major courses offered to help students "catch-up"</p> | <p>Staffing will be problematic until tenure line faculty are given an incentive for summer teaching.</p> <p><u>Current</u>: budget amounts set before departments have any impact on what they offer</p> <p><u>Proposed</u>: SCH, etc. may not cover costs of special summer programs; loss of opportunities</p> | <p><u>Summer Session Principle</u>: Summer session will operate under same budget model as academic year with the goal of fully utilizing the revenue generating potential of summer term.</p> <p>Until a new budget model is implemented, the following change is recommended:</p> <p>The University should incent departments to increase summer enrollment by:</p> <ol style="list-style-type: none"> a) allowing departments to participate in revenue sharing, b) assessing overhead to self support programs using revenue as basis, c) improving the efficiency of current summer session operating model. |

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| | <p>Will require ongoing program evaluation to monitor fiscal viability. Decision at unit or central level?</p> | <p>Allows units to be experimental, entrepreneurial, and creative.</p> <p><u>Current</u>: balance of programs within unit may allow certain programs to offset costs of others</p> <p><u>Proposed</u>: SCH always captured</p> | <p>Eliminates department flexibility to use self support 'for credit' revenue for discretionary purposes.</p> <p><u>Current</u>: some units have more staffing than others and cannot take advantage of this opportunity</p> <p><u>Proposed</u>: greater marketing costs</p> <p><u>Proposed</u>: lack of captured audience may limit programs</p> | <p><u>Self Support Principle</u>: Self Support programs will exist for 'not for credit' programs. Self Support programs must be 100% self sustaining.</p> <p>Overhead rate will be assessed on revenue; need to evaluate appropriate rate.</p> |

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| | <p>Need for ongoing evaluation to determine if programmatic remissions are successful. What are retention and graduation rates of students who receive these remissions?</p> <p>Who determines allocation of these remissions?</p> <p>The University may be required to fund targeted remissions regardless of overall institutional goals (OUS requirements)</p> | <p><u>Proposed</u>: opportunity to be more strategic</p> | | <p><u>Fee Remission Principle</u> Outside funding resources should be increased to provide additional scholarship resources for students.</p> <p>Fee remissions should support the University's institutional goals and be aligned at a similar level as our peer institutions.</p> |

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| <p>Auxiliaries (such as housing, dining, parking, Rec Center, athletics & service units like telecom and facilities: including overhead administrative rates</p> <p>Committee Chair - Mark Gregory</p> <p>Committee Members: Sharon Blanton Robert Fullmer Jackie Balzer Ray Johnson</p> <p>(staff - Deb Janikowski , Andria Johnson & Don Forsythe)</p> | <p>General Issues Raised:</p> <p>General Issue A: We need to consider total cost of attendance and its impact on enrollment and student success in all auxiliary revenue adjustments.</p> <p>General Issue B: We need expectations for auxiliary fund balances, in order to raise accountability and predictability auxiliary units need to buffer their own cost variability.</p> <p>General Issue C: Internal overhead assessment of auxiliary dollars and fund-raised dollars becomes a disincentive to produce more.</p> <p>General Issue D: Auxiliaries vary significantly in what costs they cover directly. Overhead charges against auxiliaries can be imprecise or not equitable.</p> <p>General Issues E: Aux units may not understand what the overhead charges are covering.</p> | <p>Aux units are generally incented to grow revenue – especially external revenue.</p> | <p>High charge back internally may cause units to avoid needed work - resulting in reduced quality for campus.</p> <p>Increased total cost of attendance may negatively impact enrollment and student success rates</p> <p>Assessment can be a disincentive to make more revenue.</p> | <ol style="list-style-type: none"> 1. All pricing for auxiliary services should consider total cost of attendance, market factors and impact on employees. 2. All auxiliary enterprises should be regularly reviewed for revenue generation, organizational efficiency and alignment with Portland State’s academic, administrative or community engagement objectives. The university should pursue and grow only those auxiliaries that also align with our mission. 3. The overhead assessment policy for auxiliaries needs to become more equitable and more reflective of true costs of services and on the overall funding for university infrastructure. |

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| | <p>General Issue F: Some units have services that can not be priced higher without losing market share to outside providers (Example: housing), increased prices may reduce total revenue.</p> <p>General Issue G: Some units that are managed as auxiliaries are potential money losers, but are desired for other reasons (Example: hotel pays debt on needed land, ticket office supports arts and athletics ticketing)</p> <p>Unit Issues Raised:</p> <p>Unit Issue A: Network and telecom funding and budgeting models are using significant cross subsidy. The OIT-NTS unit is depending heavily on traditional phone and move/change revenue – both of which are at risk of being made technologically obsolete. NTS revenue sources should be re-aligned to ensure consistent sustainable service across all of its services.</p> <p>Unit Issue B: Facilities and Planning has an over reliance on cost-recovery – with even</p> | | | <p>4. The overhead assessment policy is currently 2 tiers – a 5% student and a 16% all other auxiliary tax rate. The 5% cap on student funding activities need to be reviewed in order to reflect the same level of funding required for university general infrastructure.</p> <p>5. Expanding revenue in areas that bring in outside dollars (ie no impact on total cost of attendance) is preferred to increasing overhead rate or increase burden on students. However, attention must be paid to impacts on the quality of services to campus when campus assets are used to make external revenue.</p> <p>6. In order for any auxiliary service to serve its support function and maximize revenue, its rate structure should be calculated based</p> |

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| | <p>routine services being charged back. The units funding sources and service sets should be studied and realigned to better serve the campus.</p> | | | <p>on the “true cost” of all its activities. Cross subsidy should be identified and units should strive to build rates that reduce cross subsidy and reflect the reality of costs incurred.</p> <p>7. PSU should increase revenue from enterprises that can take place during slack periods, like the summer. Using any slack capacity should be a priority of the University.</p> <p>8. As part of rate setting, all auxiliary units should also conduct annual planning to identify services, policies or procedures that can be adjusted to reduce costs or administrative overhead without sacrificing service, quality or accountability.</p> |

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| <p>Research: grants, contracts & Indirect Cost Recovery</p> <p>Committee Chair - Kevin Reynolds & Michael Fung</p> <p>Committee Members: Jonathon Fink Ren Su Jean Cavanaugh Diane Yatchmenoff</p> <p>(staff - Jennifer Chambers and Alan Kolibaba)</p> | <p>If research is a priority, then IDC should be used to foster growth of Research</p> <p>It is not always clear where IDC money goes.</p> <p>Because IDCs are not adequate to fund growth of Research, the University needs to invest other dollars if this enterprise is to grow.</p> <p>Of the total IDC budget, how much supports infrastructure costs?</p> <p>Should the approach to building the Research enterprise be more like the Foundation's Pyramid Approach?</p> <p>We need to begin "harvesting the learning" from the Researchers who are being successful in the PSU context. These are faculty members who have broken the code of how to get large grants – even with PSU's limitations. These may entail some type of career and success mapping project.</p> | <p>A small portion of IDC should come from the Research Office for PI's</p> <p>A more consistent approach to redistribution of IDC by Deans might incentivize more interdisciplinary research campus-wide.</p> <p>Capturing and publicizing the methods and career trajectory of highly productive Research Faculty could serve as incentive to new faculty.</p> <p>Similarly, capturing and publicizing the methods of highly productive Research Faculty working at different grant size scales within the Colleges could serve as incentive to new faculty.</p> <p>A fundraising campaign that targets "great research ideas" could be a big incentive for</p> | <p>Those groups that were not historically part of the Research enterprise do not have incentives to join it now.</p> <p>Inconsistent formula of redistribution by the Deans for distribution to their PI's</p> <p>OUS Chancellor is taking 3% of PSU IDCs.</p> <p>Infrastructure support for faculty is inadequate.</p> <p>Research support is inconsistent across the university.</p> <p>There is no financial mechanism for rewarding research productivity on a temporary basis.</p> <p>CULTURAL: Every time we promote researchers, there is a group that feels left out.</p> | <ul style="list-style-type: none"> • The primary reasons that PSU faculty members conduct research are to address societal needs, push back the frontiers of knowledge, advance their professional careers and give students experience with the scientific method. Generating grant revenue for the University is also an important factor and benefit for the University, but is not a motivation for the faculty. • Research is an expensive enterprise, requiring significant University investment and prioritization. These costs are justified by increases to the institution's overall reputation, ability to recruit faculty and students, and appeal to potential donors, foundations, funding agencies and corporate partners. |

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| | <p>Because PSU is unionized, post docs, etc. cost more than at our peer institutions.</p> <p>More IDCs should be aggregated for investment – comparable to our peers.</p> <p>What is the principle for “waving” IDCs? If the overhead is fixed, then we either transition to a more thorough approach for adjudicating IDC levels...or...we don’t wave IDCs.</p> <p>How, why, when and how do we waive IDCs? What forms, process and signatures should be required?</p> | <p>philanthropists, the Foundation and PSU researchers.</p> | | <ul style="list-style-type: none"> • Because Research is an expensive enterprise, PSU should recognize the importance of building proper infra-structure support so that research activities can thrive. With this goal in mind, the University should establish a proper allocation model for the Indirect Cost Recovery pool to build university wide infrastructure support. • Because PSU is growing in size and ambition, and because its resources are highly constrained, the administration needs to preferentially promote those research grants that support agreed-upon strategic priorities and bring in full overhead*, which in turn more completely offset their costs. • In order to better link |

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| | | | | <p>allocation of resources with the strategic priorities of the University, those Faculty members that generate these “more desirable” grants should thus receive:</p> <ul style="list-style-type: none"> ○ the highest quality administrative support ○ reduced teaching loads ○ prioritized allocation of research space <p>* Although some faculty members prefer (or are obligated to seek) grants that lack full overhead, they must recognize that the costs of administrating their research are subsidized by other faculty whose grants are fully burdened.</p> |

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| <p>Fees: includes course fees, online, incidental, Rec Ctr,</p> <p>Committee Chair - Darrell Brown</p> <p>Committee Members: Melody Rose Larry Wallack Jackie Balzer Dee Wendler</p> <p>(staff - Jennifer Chambers & Cher Wildenborg)</p> | <ul style="list-style-type: none"> • Some fees create perverse incentives that result in undesirable outcomes. E.g., faculty calling classes web-enhanced rather than hybrid so students avoid online fee. • Some fees pay for services the payers cannot receive. E.g., rec. fee for online international students who never come on campus. • Some students use fee-based services without paying fees. E.g., students in web-enhanced classes use services without paying the online fee. • Students are confused by fees and cannot predict the cost of their education. • Administrative fees are inconsistent across different units/programs. E.g., 5% for student fees, 16% for others. • Departments create fees to backfill the gap in their base funding. E.g., lab supplies. | <p>Benefit to create new products/services that are revenue positive Create fees that can be charged rather than at the cost of service</p> <p>Set fines at punitive levels for modifying behaviors Improve processes to minimize real costs</p> | <p>Attempts to obtain products/services from non-standard sources</p> <p>Faculty not properly classifying courses Students avoiding courses they should take</p> | <ol style="list-style-type: none"> 1. Fees must be transparent to the students and departments. 2. Fees must ensure that the full cost of providing the product or service is covered. 3. Fees must ensure that multiple potential service users are treated equitably. 4. Fees levied as an administrative charge need to be consistent across units and programs. 5. Fees levied on high demand products, programs, or services can be set above cost to contribute to the overall benefit of the University. |

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| <p>Private Funding</p> <p>Committee Chair - Francoise Aylmer</p> <p>Committee Members: Darrell Brown Barbara Sestak Torre Chisholm Eric Blumenthal David Johnson</p> <p>(staff - Cher Wildenborg, Jennifer Chambers and Gayle Schneider)</p> | <p>Issues affecting PSU’s ability to raise private funds:</p> <p>Underdeveloped culture of philanthropy at PSU</p> <ul style="list-style-type: none"> - No institutional prioritization of funding needs - Non-strategic in seeking and responding to fundraising opportunities - Non-engagement of alumni - Lack of appropriate infrastructure for fundraising - Limited awareness of Development practices and responsibilities - Lack of integration of the need for private support in communications <ul style="list-style-type: none"> • Low endowment doesn’t provide financial sustainability • Perception gap in the quality of education | <p>Current: Too many priorities. Proposed: Clearly defined priorities through an inclusive process and the development of case statements facilitate results and access to funds</p> <p>Current: Access to cash. Proposed: Acceptance process including possible use for seed funding or could be endowed.</p> <p>Current: None. Proposed: Control of funds to be used for scholarship, travel, programs and projects. Campus-wide recognition of faculty fundraising successes. Possible stipends for faculty.</p> <p>Current: None. Proposed: Training in fundraising becomes a lifelong skill, more and more critical in today’s academe</p> | <p>Not all needs will be included and some projects/programs will not be funded Not enough time to develop case statements</p> <p>Proposed: If accepted, reduced ability to meet established priorities. If not, could result in the loss of a larger gift.</p> <p>Current: Lack of comfort with activity. Lack of time. Lack of indirect costs recovery. Proposed: more time spent on fundraising.</p> <p>Current: Lack of interest in activity Lack of trust. Proposed: Additional responsibilities</p> | <p>Private funding is a critical factor in the long-term financial sustainability of the institution</p> <ol style="list-style-type: none"> 1. The endowment will be large enough to become one of the revenue streams supporting the budget. 2. Funding will be secured to support students, faculty, staff, programs and capital projects. 3. All divisions, working with University Advancement, will be engaged in establishing institutional fundraising priorities. 4. The institution is strategic in pursuing and securing private support. 5. University Advancement, Development and Advancement Services are |

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| | | <p>Proposed: PSU has many unique accomplishments which, if properly branded and promoted will bring in high caliber faculty, researchers, students and funding</p> <p>Current: None. Proposed: The academy as a whole will benefit from increasing its endowment to ensure access to funds during downturns and crises</p> <p>Current: Income. Proposed: Donors will give more and create new endowments</p> <p>Current: AA raises funds for operations. Proposed: Alumni Association is at the center of many alumni activities worldwide</p> <p>Proposed: University Relations is recognized as a key partner</p> | <p>Current: Communications. Structure. Culture. Funding. Proposed: None</p> <p>Current: Separateness of academy and foundation. Lack of holistic understanding for long-term fundraising. Possible negative impact on current giving. Proposed: None</p> <p>Current: Past history. Proposed: Need for operating funds</p> <p>Current: Low funding and staffing. Proposed: AA is a key partner in the success of the university</p> <p>Current: Lack of funding sources, difficulties in attracting top level staff. Proposed: A highly effective</p> | <p>viewed as valued partners by faculty and administration.</p> <p>6. Sharing of information, collaboration and coordination among the academic units, University Advancement, and other central university planning units is a critical factor for success.</p> |

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| | | <p>and helps raise substantial funds freeing tuition and fees to be allocated to operating funds</p> <p>Proposed: Faculty is more comfortable working with Development and is able to secure funding for their own projects</p> | <p>team with driven professional fundraisers</p> <p>Current: Lack of time and comfort with fundraising activities. Proposed: More time needed for donor engagement activities</p> | |