



ROUNDTABLE
REPORT

Beyond Budgets

**How financial uncertainty has changed the role of campus leaders
and how they set their goals**

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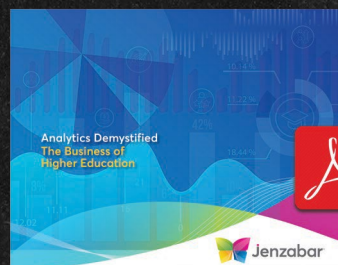
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*Photographs by
Julia Schmalz*

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INTRODUCTION



Higher education faces a host of financial challenges. Public investment in colleges and universities is shaky. Tuition revenue is softening. And the costs of labor and facilities continue to rise. Such problems helped trigger Moody's Investors Service's decision to downgrade its outlook for higher education from stable to negative two years ago.

Deans are often in the hot seat when it comes to these challenges. They must grow academic programs while keeping spending low. They must advocate for faculty budget requests while also constantly explaining the fiscal realities to professors. They must be entrepreneurial in how they increase revenue and trim overhead while preserving the core mission of their college or division.

To explore how deans have managed these issues, *The Chronicle* organized a panel of experts from leading higher-ed institutions. Four deans came to our office in Washington, D.C., to discuss the financial pressures their colleges face, the lingering impact of the Great Recession, how they set priorities given current constraints, tips for finding efficiencies, and views on emerging budget models. The participants offered perspectives from different types of institutions: public and private, minority serving, research intensive, and religiously affiliated.

This report offers key points from the discussion to help deans and other college leaders as they think through financial problems and seek innovative ways to solve them. The following excerpts from the conversation have been edited for length and clarity.

PANELISTS



Gregory F. Ball is the dean of the College of Behavioral and Social Sciences at the University of Maryland at College Park. He became dean in 2014. Previously, Ball was vice dean for science and research infrastructure in the Krieger School of Arts and Sciences at the Johns Hopkins University, and also served as director of the school's undergraduate neuroscience program. He has a Ph.D. in psychobiology from Rutgers University.



Anna McPhatter is the dean of Morgan State University's School of Social Work. McPhatter has been at Morgan for more than 20 years as a professor and administrator. In addition to dean, she has served as the institution's interim provost and chair of the Department of Social Work and Mental Health.



Peter Starr joined American University as dean of the College of Arts and Sciences in 2009. Before coming to the university, Starr was a professor of French and comparative literature at the University of Southern California. In 2006-07, he served as interim dean of California's College of Letters, Arts, and Sciences. He earned a Ph.D. in comparative literature from the Johns Hopkins University.



Catherine M. Wehlburg is dean of the School of Sciences, Mathematics, and Education at Marymount University, which she joined in 2018. Prior to Marymount, she was the associate provost for institutional effectiveness at Texas Christian University. She earned a Ph.D. in educational psychology from the University of Florida.

MODERATOR



Ian Wilhelm is an assistant managing editor for Chronicle Intelligence, a division of *The Chronicle of Higher Education*. Previously, he helped oversee the newspaper's enterprise reporting and international coverage and was a reporter with *The Chronicle of Philanthropy*.

SECTION 1



“I have to be very careful that I can protect the core mission. We have to deliver a high-quality product to our undergraduates, to our graduate students, and to the research mission at the university.”

—Gregory F. Ball

Examining Higher Ed's Financial Outlook

It's been more than a decade since the Great Recession hit. The national economy is strong overall, and the unemployment rate is at historic lows. But for higher education, it remains a period of financial concern.

A 2017 survey commissioned by *The Chronicle* found that most college leaders, including presidents, provosts, and deans, identified “developing new sources of revenue” as their leading institutional challenge. The American Council on Education and the TIAA Institute similarly reported in 2017 that “never enough money” was the top frustration among college presidents.

For the deans at the roundtable, uncertainty about finances is never far from their minds either. While their institutions don't face the budget shortfalls that have forced some small, liberal-arts colleges to shutter programs, lay off professors, or close altogether, the fiscal outlook shades much of their daily decisions and future planning.

Their concerns include how to support undergraduates, maintain faculty pay, and repair failing facilities and lab equipment.

Such concerns can add up. And during the discussion at *The Chronicle*, the deans discussed how they manage to forge ahead despite them.

Ian Wilhelm: What's your perspective on the current financial outlook for higher education? Does it feel like a time of austerity or financial uncertainty?

Peter Starr: The answer to that question depends a great deal on what kind of institution you're talking about. Those of us who are blessed to be in an urban environment, who have strong abilities to place their students in internships and give them a job experience during their college years and beyond, are in a much different situation from those who are out in rural, smaller, liberal-arts settings.

Having said that, when you are tuition dependent, that particular motor for growth has been ratcheted down. It means the deans need to be far more entrepreneurial, creative, and inventive at a time of financial constraint. I would not say it's austerity for American University at this point. But again, we are blessed with a fairly ideal situation, as many of the institutions around this table are, being in Washington, D.C.

Anna McPhatter: I agree with Dean Starr in terms of urban institutions, because Morgan is Maryland's preeminent urban research university. On the other hand, as a historically black university, there is always anxiety and uncertainty around resources.

That struggle is always in front of us. And we rarely have the luxury of not thinking about funding, how we get funding, how we support students, how we maintain the institution, how we grow the institution, how we advance urban research, how we help communities. At Morgan, we always have a focus on how do we create a successful experience for

our students. And our students certainly come with all kinds of challenges.

Wilhelm: Dean Wehlburg, what I'm hearing is that it's not an era of austerity, but an era of financial constraints. Does that reflect your experience?

Catherine M. Wehlburg: Certainly. Marymount University is a private institution. So we do not receive state funding. We are tuition dependent. And our students who are coming in are feeling financial burdens.

Because we are so heavily tuition dependent, our decisions have to be focused on making sure that we are providing our students the things that they need to have. And we're in a location in Arlington, Va., that certainly provides for wonderful internship opportunities and fantastic student service and community engagement. But it's also a very expensive place to be. And so while our income has not necessarily decreased, our expenses have gone way up.

Wilhelm: Dean Ball, how you would describe the financial outlook at your institution?

Gregory F. Ball: It's not 2007-08 anymore. But we're cautious. We all have aspirational goals. I have to be very careful that I can protect the core mission. We have to deliver a high-quality product to our undergraduates, to our graduate students, and to the research mission at the university.

And we're always having proposals. We can add this. We can do that. We can enhance this. And I'm not, "Sure, whatever you want, let's go." We can't do that. The state of Maryland is, in general, quite supportive of higher education. Having said that, no one is in the mood — for understandable reasons — to grow tuition. And we're trying very hard to increase access to as many students as we can, with scholarships and things. So we have to be thinking of other ways to enhance revenues.

It's not a time where I lay in bed worrying about going broke. But it's also not a time that I've seen in the past where I'm soliciting expensive ideas that we could pursue.

Wilhelm: You've all mentioned some real or potential financial challenges. Is there one issue when it comes to finances that is the most worrisome?

Ball: The expense of faculty salaries, which just continues to go up. We're often in competitive situations for our best faculty. I feel like I have to always be thinking about retention funds. And I just don't see how things can grow enough for me to be attracting the best faculty consistently.

McPhatter: I just served for 13 months as the interim provost, and one of the things that just blew my mind in that position is that all of the deans would be, I need this, I need this — always, every day, asking for something. While much of it is certainly legitimate, we have about 65-70 percent of our students who are Pell eligible, and so Morgan has to always be creative in terms of raising funds for institutional aid to supplement the tuition of these students. That's what keeps us up at night. Because at any point, if the finances shrink, we may have 300 or 400 students who are not able to stay, because they don't have enough money to pay tuition.

Wehlburg: One of the things that is concerning is the surprise maintenance and equipment costs. We have regular replacements scheduled for computers and for other kinds of things. But in some of our labs, when something doesn't work anymore, there's a high expense that we haven't necessarily planned for; we're a small institution. We don't have that much of a cushion for those sorts of things.

Starr: Let me add a few. The rising cost of IT and expectations around IT. The rising cost of servicing the mental-health needs of our students. The rising costs of journals and publications. It's a whole series of factors, none of which we control. The crucial point is we don't control the academic job market. We don't control the needs of our students coming to us. We control maintenance. But the temptation to defer it is very strong.

Wilhelm: As Dean Ball, mentioned it's not

the Great Recession. But does its impact still linger, if only in people's minds?

Ball: I see the concern among parents and families about the job placement of the students. And I get that. But for those of us in the arts and sciences, where we don't have someone getting an engineering degree with a clear path, or a business degree, parents are just very nervous because of the fact that in recent memory, so many people were unemployed. And it's been very important for us to be much more intentional in the arts and sciences about helping students get placed, to measure this, tell the parents what we're doing, and give them statistics. When I meet with parents, I say, if all I do is get your child a job, I'm a failure. And that takes them aback. I say, we're trying to do so much more to give them an education to prepare for life, which is going to be complicated. One of our biggest priorities now is to try to enhance our job placements, and give the students the tools so they can be confident about getting placed.


Starr: One of the things that I say to parents is there is no magic bullet to job X. You may think that to be a lawyer you have to be a political science or a philosophy major. But actually, being a biology major actually might help you. Because you have a skill that you can bring into a practice in health law.

As for the question about the Great Recession, I want to be a little bit contrarian, because it was an odd experience. One would have thought for a university like AU, which is tuition dependent, that those were tough times.

Actually, 2009-10 were the glory years for us. Because we had all these master's students who were parking themselves in graduate school to wait out the recession.

Then, two things happened. One is higher education got a little complacent that these numbers would hold. And, of course, when the job market changed, students stopped enrolling as much.


The other is the long-term effects — the sense of anxiety that the world is less stable. We're still feeling 2007-08 from the anxiety of the parents and the anxiety of the students.



“The crucial point is we don’t control the academic job market. We don’t control the needs of our students coming to us. We control maintenance. But the temptation to defer it is very strong.”

—Peter Starr

SECTION 2

A close-up portrait of Anna McPhatter, an African American woman with short, dark, curly hair. She is wearing black-rimmed glasses, a white blazer with black polka dots, a black top with a large white pearl brooch, and large pearl earrings. She is looking slightly to the right with a thoughtful expression. The background is a blurred bookshelf.

“I’ve been at Morgan over 20 years. And I can tell you there is increased pressure for deans to raise money, and an expectation that you’re raising money. That’s getting to be part of how you’re evaluated.”

—Anna McPhatter

Setting Priorities Amid Uncertainty

The financial uncertainty facing deans shapes their agenda and ambitions for their units. They must make sure their goals are realistic in the context of budget constraints and triage the unexpected expenses that inevitably occur on a campus.

At the roundtable, the deans said a key to successfully advocating for expanding an academic program, adding faculty positions, or paying for a new effort is to make sure they are aligned closely with the university's overall strategic goals. Interdisciplinary research and student retention, for example.

Setting smart priorities also means communicating clearly with faculty. It means consistently explaining what the budget realities are, why some research projects should get the greenlight and others are rejected. It's not a new responsibility for deans, but one that becomes more pressing during a time of scarcity.

In addition, the panelists said the fiscal concerns have pushed them to get more involved in other duties. For example, they are doing more to recruit students and raise money, which is a task now required of deans at both private and public colleges.

Ian Wilhelm: How do the various financial pressures and constraints affect how you set priorities?

Anna McPhatter: The way you think about it is very tied to strategic goals and about how you prioritize the goals. It's student success. It's research. It's community engagement.

And so the budgets and budget priorities are lined up with those goals. As a dean, if I really am pushing for funding for a particular thing, I have to be very, very, very good at making the case about how it helps us in reaching the strategic goals of the university.

I may want to develop an academic center. But I have to be able to show the provost and the president that it's going to enhance student retention, enhance student graduation rates, increase enrollment at the university, and have a significant impact on research.

Catherine M. Wehlburg: With shared governance being such an important piece of what we do, transparency and communication is crucial to budget changes. Everyone won't like what happens, but at least there is awareness of why it's happening and how it fits in with the overall strategic planning of the university.

Wilhelm: Do you find that's a big part of your job — explaining to faculty, here's what the budget reality is?

Wehlburg: Well, it's both taking things that are happening institutionally to the faculty, and taking what is happening in the class-

rooms, in the labs, and in the community back up [to the administration] to say, This isn't the way we want to go.

Wilhelm: Do constraints make it harder for you to be a dean because you're squeezed in the middle of faculty and senior administrators?

Wehlburg: That's kind of the definition of the job.

Peter Starr: I have a colleague who is now president of a top-tier university who had been a dean in a time of economic scarcity and in a time of economic plenitude. He said it's actually easier to be a dean in a time of economic scarcity, because you just say no. And people expect you to say no.

McPhatter: I love the point about transparency. Here's what the finances look like, [faculty members]. And the only way we can get through this is that you get those grants done. Bring in some extra funding. Increase the contracts. And that's how you get to travel and support graduate students. The only way we're going to be able to grow the program, the school, the institution depends on the part that you do, as well as us.

Gregory F. Ball: When contemplating new endeavors, we're setting in more reviews along the way and sunset costs. Sometimes in academe, we get a new entity going, a center or something, and frankly, we'll be a little vague about the long-term plan.

We have to protect the budget for the core mission. I need to have outstanding faculty in front of students every semester. I have that duty to them. We need to have labs that are running well.

That means that when you get excited about some things that would be aspirational or nice to do, you have to be very careful that they don't distort your main goal.

Starr: I would add that there's a phenomenon we've not talked about, but it's implicit: the increasing globalization of higher education. When I first got to American University, people would talk about the evil school across

the quad, or the evil school down some avenue that will go unnamed. Now our competitors are in China as well as around the United States. We really need to work together as an entire university.

McPhatter: There's another issue that we struggle with, and that is balancing tenure-track faculty with contractual adjunct instructors.

Ball: We're developing professional-track faculty who have longer term contracts. They are embedded in the department. And they're part of the community. They want to be there. And they want to teach. And so the students are happy to have them in the classroom.

They're not expected to run a research program. And they have a higher teaching load. They all have Ph.D.s. And they really help us have excellence in our teaching mission.

But I get challenged by department chairs, Why are you hiring more of those? And I say, I need to have the right people in the classroom. And this is a way I can afford. But I'm very sensitive to: What's the right ratio between professional-track and tenure-track faculty?

Wehlburg: Part of what has to happen is it has to be managed in a way where you get growth where you want it, and you don't have growth where you don't want it.

Ball: This is a critical trade-off we're all grappling with. And there's not a clear best practice. I've been trying to think about things like a ratio. And it really depends on departments. Because they have different cultures into how much graduate and undergraduate teaching they do. And I'm sure, like all of you, I'm reluctant to reach into a department and tell them how they should do these kinds of things. They'd bite my hand if I did.

I really do worry about getting this right. Because if we're going to do the research mission, we need talented tenure-track faculty leading the charge on getting the grants, setting up the programs, developing new data, training the graduate students. But on the other hand, we have a tremendous responsibility to the undergraduates.

“More and more I’m involved with our admissions office helping with recruitment. Faculty are, too.”

—Catherine M. Wehlburg



Wilhelm: Are there activities that you are now more involved in because of fiscal constraints?

Wehlburg: Enrollment and admissions. More and more I’m involved with our admissions office helping with recruitment. Faculty are, too. In the past, it’s been, that’s not my job, I’m hired to teach and do research. I’m not hired to recruit. But some of that’s changing. Because our faculty have seen that they can pull the students in and show them what it would be like to be a student. The faculty do that much better than our admissions officers.

Ball: What goes along with that is fund raising for scholarships. Because you see those students, and you want them here. The main thing I’m asking people for money for are scholarships. Because it’s terrible when a student can’t come who’s qualified to come. It drives me crazy.

McPhatter: I’ve been at Morgan over 20 years. And I can tell you there is increased

pressure for deans to raise money, and an expectation that you’re raising money. That’s getting to be part of how you’re evaluated.

Ball: Do you have a dollar goal every year? I do. I meet with the provost, and here’s the goal. Where are you in relation to that? It’s pretty stark.

Do you have your own staff to help you, though? Or do you use the university staff?

McPhatter: The university’s office of institutional advancement has people that are assigned to each of us.

Wehlburg: At the smaller institutions, we don’t have that. We have a centralized office that we can work with. But a lot of the fund-raising the deans have to do ourselves. So I’m becoming an expert at alumni relations because there simply isn’t sufficient support at the university level to have assigned individuals.

SECTION 3

“Sometimes [efficiency initiatives] work. Sometimes they don’t... we really need to be very deliberate and careful about not throwing out the proverbial baby with the bathwater.”

—Peter Starr



Trimming Costs and Wrangling a Budget

Higher education historically has a bad reputation for accumulating overhead and educational programs. Administrative bloat or academic sprawl, while sometimes exaggerated, are problems deans have to wrestle with.

During the conversation at *The Chronicle*, the participants said they are doing more to analyze how they can cut costs by sharing administrative services with other units. They also mentioned taking a closer look at academic programs and departments to identify ways to make them more efficient.

That's not to say the panelists have donned green eyeshades to crunch the numbers like dispassionate accountants. When they examine spending, they say they do so to preserve the core mission of education and research at their institution.

Of course, deans often only have limited control of their budgets. Many institutions make funding decisions centrally. Another model has emerged that allows deans to have more say. Responsibility center management, or RCM, as it's known, has a long history at some large research institutions and has spread to others in part because of higher ed's shaky fiscal environment. Essentially, it gives deans a financial incentive to cut costs, find new sources of revenue, and think more strate-

gically. But, as our panelists pointed out, it has its drawbacks as well.

As the conversation wound down, the deans discussed how they view their jobs. Being a dean during a time when the financial outlook is so uncertain may give some people pause. Yet the participants said they continue to enjoy it and see themselves making a positive change in the lives of students and the careers of faculty.

They also hoped faculty members would continue to rise through the ranks and said that the traditional steps — serving on committees, leading a department — remain good preparation even at a time when so much of higher education is changing.

Ian Wilhelm: We've talked about being more entrepreneurial because of financial constraints. How much does that involve being more efficient and trimming costs?

Gregory F. Ball: The University of Maryland College Park's a big place. We have a number of units. And our back office staff should be cooperating more. For instance, we completely consolidated handling travel into one center for the college in order to reduce staff members and get better discounts. So there are things like this that are not very fancy, but they can save you money. And every dollar you can save in support, you can put

into programs, you can put into scholarships, you could put into faculty. So it does make a difference.

Peter Starr: This efficiency question, like so much of what we do, is a balancing between two positions. So on the one hand, centralization creates some efficiencies. But there's also a cost in local knowledge. We're struggling with this, in terms of grants and contracts. The pre-award help that our faculty expect and deserve — how localized should that be? Should it be more central?

Efficiency initiatives in college and university life often give the president and the provost a lot of truck with the board. But my decades of reading *The Chronicle of Higher Education* suggests that they fail as often as not. Sometimes they work. Sometimes they don't. And that we really need to be very deliberate and careful about not throwing out the proverbial baby with the bathwater.

Wilhelm: When it comes to efficiency, how much do you examine your academic programs?

Starr: I think about that a lot. A college of arts and sciences, by definition, will have disciplines that are essential to the liberal arts but don't have the numbers that many other disciplines do. The idea of a college of arts and sciences without a philosophy department — I'll take the philosophy department, because ours actually does very well — is to me an anathema.

But these are the hard decisions that deans are making these days. Can we do without a department of X? And what would it cost us in terms of our overall mission, in terms of our wanting to be a university in the root sense of that term? And it's tough.

Anna McPhatter: Sometimes senior administrators will look at your enrollment numbers and say, Your enrollment is decreasing, and you have the same number of faculty. But these are the same instructors who teach a significant number of what we call gen eds. They're teaching English and biology and required courses. And so it's not just that they're teaching majors.

We were having that discussion in terms of how do you push these departments to begin

to think about how to reorganize, how to do some interdisciplinary work so that it's not just history, and philosophy, and religion, and political science? How can you pull those departments together so that it appears that you're making some kind of sense about how much it costs to keep those many faculty when you have a lower enrollment.

Catherine M. Wehlburg: What you're speaking to is really important. We have to come up with new metrics. Just counting the number of majors isn't enough. Even credit-hour production may not be enough. So we've got to look at other ways to talk about what success looks like in a program.

Ball: I have an example of how teaching efficiency can happen. Psychology and biology were in two separate colleges. They both had a concentration, one in neurobiology, the other in behavioral neuroscience. And they were teaching parallel courses. We set up a neuroscience major, which is combining those two. All those faculty are now working together. And they're teaching new courses that are giving students more options instead of replicating ones you need.

Wilhelm: How much control do you, as deans, have over your budget?

Ball: You just raised an important point, which I'd like to hear from my colleagues. What happens to a faculty salary line when someone retires or dies? Who controls that?

In my case, most of it stays in the department. And only some comes back to me. There's not an official university policy on that. That varies by college. It has a big effect on decision making.

Wehlburg: In the past, it falls to the bottom and disappears magically. It goes back to central. But one of the things that we've been doing this year is trying to actually follow it to find out where it went and see if we can ask for some of it back. Sometimes it's being used for something else. And so we can't or we can only get some of it back.

McPhatter: You asked the question about how much autonomy we have with our budgets. At

my university, we've been doing a lot of deep dives to really come up with a different budget model that gives deans more autonomy in terms of how we determine budgets.

Wilhelm: There's a budget model called responsibility center management, or RCM, which gives deans more control of their spending. Peter, you've had experience with it at American University and your previous position at the University of Southern California. What's it like?

Starr: Three of our seven schools now at AU are RCM units. And basically, it means — the cheeky way to say it is — you eat what you kill.

Ball: Tuition follows the student. So if one of your students walks to another college, the dollars follow immediately.

Starr: RCM sounds great as a dean. Because it gives you a lot of flexibility to set your own agenda and be your own master. It tends to very seriously compromise the provost and to some degree the president's ability to set a strategic direction and to make investments. Because it tends to starve the center, particularly the provost, unless there's considerations made to fully fund the provost from that.

The centrally budgeted model can be more strategic. But the vice of it is that it's more incremental. You just get what they got last year, plus or minus.

Ball: The benevolent provost model.

Starr: Yes, if the provost is benevolent, it tends to be OK. The vice of the RCM model is that schools fight like cats and dogs for students.

Wehlburg: At Marymount, we're incremental. But I know several people who are in institutions where they do RCM. And the nice thing about that is it does give you some additional control. And it also provides for the opportunity that if you have an area that is growing faster, you can get funding for that without having to take it away from somebody else's pie.

Ball: We're talking about a budget model change. We're looking at a hybrid between the incremental and the RCM, where there will be

feedback loops over time. And we're discussing the metrics. Should it be number of majors? I think the number of students who graduate, for example, is a good metric.

Wilhelm: We've talked a lot about how the dean's role has changed in light of financial constraints. What would you say to a professor who came to you and said, "I would love to be a dean someday. What do I do to prepare for the role given all of these financial challenges?"

Ball: Being a department chair is a great first step. You meet with the deans regularly and discuss finances. And then you can volunteer to be on the dean's committee to look at something, which we like.

We're much more intentional about leadership training. We have programs to encourage people to get into those roles. We all know that regular faculty make fun of administrators and say it's the dark side. But you need people running universities who understand and love universities. And they're going to come from the faculty.

McPhatter: The most challenging part about being a dean is managing the faculty, managing faculty relationships, managing faculty needs, responding to all kinds of things. My suggestion would be working hard to understand collegial relationships among faculty and how you deal with conflict among people, and faculty in particular. That's one of the things that I wish that somebody had said to me.

Wilhelm: Has the financial environment affected your own ambitions? Do you still want to climb the ladder?

Ball: I'm still open to a larger role because I enjoy working with colleagues to build academic programs and thinking about teaching. And managing the budget effectively is part of what you have to do to do that. Having said that, I have very open eyes now, of the issues you were raising. And so I'm going to be cautious if something were to come my way.

Wehlburg: I like feeling like I'm making a difference. And I like being able to know what's going on and being able to help guide some of our newer faculty and our students. When

I go home at night, I might be tired, it may have been a long day, and some things may not have gone the way I wanted them to, but I feel like I have made a difference. And that is very rewarding.

McPhatter: I certainly prefer being a dean to being a provost. As a matter of fact, at the retreat that I had with deans a couple of weeks

ago, I gave my reflections on being the interim provost, which was entitled, Give the provost a break. Being second in command at a university, you never disconnect. You can't turn your phone off. Because something may happen to a student in the middle of the night. That's the part of being a senior administrator that I don't really find really suits me. I'm good just being the dean. I'm good.

"I go home at night, I might be tired, it may have been a long day, and some things may not have gone the way I wanted them to, but I feel like I have made a difference. And that is very rewarding."

—Catherine M. Wehlburg



FURTHER READING

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Jenzabar's Financial Model helps institutions use data to manage resources to maximize success using the key performance indicators and ratios you need to support your mission, including:

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- ▶ Resource sufficiency and flexibility
- ▶ Asset performance and management
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