UNIVERSITY OF WISCONSIN SYSTEM

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Program Planning, Review & Array Management - Budget and Planning Checklist

For the Review of New Academic Degree Program Authorizations

This budget review checklist is used by PPRAM and Budget & Planning staff when reviewing the program authorization, cost revenue spreadsheet, and budget narrative submitted as part of a new academic degree program authorization request. University PPR liaisons may find it to be a useful reference.

BUDGET REVIEW QUESTIONS (check if yes)

Tuition Structure

☐ Is the proposed tuition structure in accordance with SYS 805 and the published tuition schedule? *https://www.wisconsin.edu/budget-planning/tuition/*

☐ If a different tuition model is used (e.g., additional tuition, service-based pricing) did the university apply and reference the appropriate university and System policies?

☐ If additional program or course fees will be charged, are fees allowable and in accordance with SYS 805?

Cost and Revenue Projections Narrative

Introduction

☐ Does the university note unique program characteristics that may impact budget projections or explain the budgeting methodology?

Section I – Enrollment

☐ If student FTE projections are lower than the headcount projections, does the university describe how the student FTEs were calculated?

Section II – Credit Hours

☐ Does the narrative clearly describe how current and new credit hours were calculated?

☐ Are only the credit hours attributable to major/program requirements included in the estimate?

- ☐ If not, does the narrative include a justification for the calculation?

☐ Does the university note any unique features of the program model that will influence the need for new course sections?

Collaborative programs only

☐ If the program will be offered as a collaborative, do the universities detail how these credit hours will be distributed across collaborating partners?

Section III – Faculty and Staff Appointments

☐ Does the university describe the number of current and new faculty/staff Full Time Equivalent (FTE) appointments needed to implement and sustain the proposed program?

☐ Are the faculty and staff FTE estimates sufficient to meet demand for new courses or course sections?

Section IV – Program Revenues

☐ Does the university clearly describe how tuition revenues were calculated for new and continuing students accounted for in Section I?

☐ If applicable, does the university describe how additional tuition or fees were calculated?

☐ Does the university list other program revenue sources that will be needed to sustain the program?

- ☐ If so, are these sources of revenue sufficiently described (e.g. redirection of program revenue from another source or extramural funding)?

Section V – Program Expenses

☐ Does the scope of the program expenses match the scope of program revenues? E.g. if continuing program revenues are included, are continuing program expenses also included)?

Salary and Fringe

☐ Does the university detail the instructional and non-instructional salary and fringe expenses attributed to the proposed program; discuss how salary and fringe were calculated, referencing faculty/staff FTE appointments reported in Section III?

Other Expenses

☐ Does the university detail by line and discuss additional expenses related to program implementation? If so, does the university detail and describe:

- ☐ expenses for the use of university facilities, capital equipment, operations, maintenance, and/or library?
- ☐ direct program expenses such as marketing, travel, program materials, etc.?
- ☐ indirect program expenses, such as charges for university services, or planned reinvestments in the program.
- ☐ other program expenses attributable to the program?

Section VI – Net Revenue

☐ If the program will eventually operate on a cost recovery basis, does the university clearly indicate when the program will be self-sufficient?

☐ If positive net revenue, does the university discuss how funds will be reinvested at the university?

☐ If *negative* net revenue, does the university explain how any deficit will be addressed, and via what revenue source?