



Minutes

University Budget Model Subcommittee Meeting

October 28, 2019

Agenda: Dawn Ressel, Chief Data Officer will present information regarding UM's data infrastructure and the impact to the budget model

Present: Dawn Ressel, Stacey Eve, Tim Edwards, Daniel Parsons, Terri Herron, Jeff Bookwalter, Adrea Lawrence, Stacey Eve, Hillary Stowell, Paul Lasiter

Not Present: Jon Harbor

The objective of this meeting was to understand the university's available technology and resources to support viability, measurability, and assessment of strategic directives.

Dawn Ressel introduced Tableau, a visual analytics software recently licensed by the Montana University System, which allows the data office to create easy to navigate dashboards based upon information contained in the Banner ERP. Approved users can access Tableau dashboard reports by logging in with their net ID at tableau.mus.edu.

Dawn shared concerns about data that require manual manipulation, most notably the structure of the organizations in the chart of accounts that has been changed and/or reorganized over the years. Dawn shared one example of an inconsistency in the report found in the Academic Allocation Subcommittee folder named FY14-FY19 Expense Trends report, and introduced and led discussion concerning other reports in the same folder.

Paul Lasiter presented a [spreadsheet](#) prepared from information included in Tableau reports. The spreadsheet is an accumulation of calculations related to net tuition, fees, number of students, credit hours, and program tuition.

Additional [metrics and dashboards](#) from the website of the Office of the Commissioner of Higher Education were shared to explain how funds are appropriated to universities.

In the next meeting the group will explore differing methods of allocating revenue based upon actual past results.