Breaking the Trade-Off Between Cost and Quality

Enfranchising Faculty in the New Budget Reality
## From Rising Tide to Zero Sum

**The Recession as Turning Point**

<table>
<thead>
<tr>
<th></th>
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</tr>
</thead>
<tbody>
<tr>
<td><strong>Total Revenue</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Total Revenue Growth</td>
<td>5.0%</td>
<td>1.6%</td>
</tr>
<tr>
<td>Non-Tuition Revenue</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Growth</td>
<td>3.9%</td>
<td>-0.3%</td>
</tr>
<tr>
<td><strong>Net Tuition Revenue</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Net Tuition Revenue</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Growth</td>
<td>6.9%</td>
<td>3.5%</td>
</tr>
<tr>
<td>Institutions with Declining Net Tuition Revenue per Capita</td>
<td>11.3%</td>
<td>33.1%</td>
</tr>
<tr>
<td><strong>Enrollment</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Enrollment Growth</td>
<td>2.1%</td>
<td>1.1%</td>
</tr>
<tr>
<td>Institutions with Declining Enrollment</td>
<td>27.5%</td>
<td>43.2%</td>
</tr>
</tbody>
</table>

Source: EAB analysis of IPEDS data

## A Broken Model?

Growing Numbers Believe Higher Ed Financial Model Is Unsustainable

<table>
<thead>
<tr>
<th></th>
<th>I am confident in the sustainability of my institution’s financial model over the next 10 years</th>
</tr>
</thead>
<tbody>
<tr>
<td>% Presidents</td>
<td>50%</td>
</tr>
<tr>
<td>% Chief Business Officers</td>
<td>41%</td>
</tr>
</tbody>
</table>

**Revenues**
- Long-term Demographics
- State Budget Cuts
- Federal Budget Pressures
- Increased Financial Need
- Declining Median Incomes

**Costs**
- Employee Benefits
- Deferred Maintenance
- Increased Student Services
- Rising Compliance Costs
- Legacy Programs

Source: Inside Higher Education
Aligning Resources with Institutional Priorities

Resource Allocation Processes Ultimately Determine Success or Failure

Vision

Strategic Priorities

University Budget Models

Academic Programming Decisions

The Quality Concern

Fears that Cutting Costs and Increasing Efficiency Will Harm Quality

If We Cut Costs...

Our best faculty will leave

The quality of our research will suffer

We won't attract the best students

The student experience will deteriorate

We will lose ground against our peers

The quality of instruction will decline

We won't be able to serve high-need populations

“It is logically impossible to do more with less.”

Faculty Member, Public Masters University

Source: EAB interviews and analysis.
A New Paradigm

Shifting Our Perspective on Academic Performance Assessment

From Quality at Any Price...  ...To Targeted Investments in Excellence

Maximizing inputs  Maximizing outputs
The only way to improve quality is to spend more  The only way to improve quality is to focus on what works
Same performance expectations for all faculty in the program  Differentiated roles and workloads based on ability to contribute
Every discipline has equal inherent value  Seeking excellence in all disciplines will lead to mediocrity
Resources should be allocated fairly  Resources should be allocated effectively
Siloed plea for additional resources  Institution-wide alignment of resources with priorities

You Manage What You Measure

Three Different Philosophies of Program Performance Metrics

Program Outputs  How does the program impact student learning and scholarship?
Program Prioritization

Financial Performance  What are the costs and revenues of the program?
Cost Accounting  RCM

Resource Utilization  How efficiently does the program use its resources?
Traditional Program Review  Performance Based Funding
EAB Breaking the Trade-Off Between Cost and Quality

Existing Academic Affairs Forum resources on related topics:

- **Budget Models**: Optimizing Institutional Budget Models
- **Resource Utilization**: Smart Growth, Breaking the Trade-Off Between Cost and Quality
- **Program Prioritization**: Revitalizing the Program Portfolio
Finding and Reallocating Academic Resources
A Roadmap for Realizing Academic Ambitions

**Space Utilization**
- Identify course access bottlenecks
- Better leverage existing space

**Course Offerings**
- Consolidate underutilized sections
- Reduce number of small courses

**Course Success**
- Expand bottleneck courses
- Limit high-DFW courses

**Curricular Complexity**
- Streamline major requirements
- Reduce elective offerings

**Faculty Workload**
- Maximize capacity utilization
- Differentiate faculty workloads

<table>
<thead>
<tr>
<th>Classroom Utilization</th>
<th>Underutilized Sections</th>
<th>Attempted Credits Not Completed</th>
<th>Students Graduating with Excess Credits</th>
<th>Faculty Teaching Less than Standard Load</th>
</tr>
</thead>
<tbody>
<tr>
<td>50%</td>
<td>33%</td>
<td>20%</td>
<td>30%</td>
<td>60%</td>
</tr>
</tbody>
</table>

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Consolidating Excess Course Sections

Anthropology 101 at a Public Masters University

**Excess Course Capacity**

Max. Enrollment = 45;
Space Utilization = 46%

<table>
<thead>
<tr>
<th>Course Size</th>
<th>Space Utilization</th>
</tr>
</thead>
<tbody>
<tr>
<td>31</td>
<td>69%</td>
</tr>
<tr>
<td>30</td>
<td>67%</td>
</tr>
<tr>
<td>25</td>
<td>56%</td>
</tr>
<tr>
<td>19</td>
<td>42%</td>
</tr>
</tbody>
</table>

**Consolidated Sections**

Max. Enrollment = 45;
Space Utilization = 78%

<table>
<thead>
<tr>
<th>Course Size</th>
<th>Space Utilization</th>
</tr>
</thead>
<tbody>
<tr>
<td>35</td>
<td>78%</td>
</tr>
</tbody>
</table>

**Excess Institutional Capacity**

- 25% Adjunct instructors
- 75% Full-time faculty

**Number of Students Drives Course Breakeven**

Number of Students: 289

- $8,689
- $2,980
- $22,980

**Why Class Size Matters – A Lot**

Number of Students Drives Course Breakeven

Course Contribution Margin by Section Size

<table>
<thead>
<tr>
<th>Section Size</th>
<th>Contribution Margin</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>$(3,720)</td>
</tr>
<tr>
<td>2-5</td>
<td>$(1,537)</td>
</tr>
<tr>
<td>6-10</td>
<td>$1,077</td>
</tr>
<tr>
<td>11-25</td>
<td>$8,689</td>
</tr>
<tr>
<td>26-50</td>
<td>$22,980</td>
</tr>
</tbody>
</table>

Source: EAB interviews and analysis.
Small Course Offerings Growing Fastest
Students and Faculty Time Concentrating in Courses Below Breakeven

Faculty Credit Hour Distribution by Section Size

- 30% of Total FCH Allocated to Small Courses
- 30% of Total FCH
- Annualized Percentage Change Over ~7 Years:
  - +7%
  - +3%
  - +8%
  - -1%
  - -9%

Separating Intentional from Unintentional Small Courses

Small by Design?
Why Are Some Courses Small?

"Facts of Life"

- Pedagogy:
  - Majors (like music) require smaller formats

- Accreditation:
  - Regulated student to faculty ratios

- Low-Demand Majors:
  - Secular enrollment declines

"Faculty Choices"

- Tracks and Specialization:
  - Require high course frequency

- Complex Prerequisites:
  - Reduce upper division enrollments

- Electives:
  - Can increase time-to-degree

Source: EAB interviews and analysis.
## Pulling It All Together

Institutions Seeing Tangible Savings from Review of Course Offerings

### Comprehensive Course Offering Review

<table>
<thead>
<tr>
<th>Course Cap Review</th>
<th>Capacity Utilization Review</th>
<th>Course Pathology Analysis</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Review course caps by course type and level with faculty</td>
<td>• Assess room utilization by prime time status, technology, and room type (e.g., lecture hall)</td>
<td>• Course frequency reduction</td>
</tr>
<tr>
<td>• Push for course cap parity for similar courses across units</td>
<td>• Assess avg. real teaching load (course &amp; student headcount basis) across units</td>
<td>• One-on-one instruction (ind. study) consolidation</td>
</tr>
</tbody>
</table>

Initial reduction in sections per term (~75 sections), with 10%+ achievable over time

Reduction in operating expenditures from consolidation of part-time instructor positions (~4% of OpEx)

$600K

Theoretical blanket workload possible from section elimination (from 4/4)

### Earning Faculty Buy-in

Provide Tangible Returns and Avoid Unnecessary Cuts

#### Realize Savings as Workload Reduction

Allocate new research or service releases, or start an incentive-based release or stipend program in line with strategic plan

#### Limit Course-Cutting

Avoid antagonizing course “champions” by first reducing frequency and eliminating pre-requisites as a viability check for vulnerable courses

#### Spin Off High-Volume Tracks into New Degree Programs

The largest tracks can often support themselves as degrees, buttressed with elective depth from the “mother” program

#### Refuse to Allocate New Lines to “Glutted” Programs

Establishing "glut"-related benchmarks (e.g., # of majors per course must exceed 5) provides justification for later disinvestment

Source: EAB interviews and analysis
Finding and Reallocationg Academic Resources

A Roadmap for Realizing Academic Ambitions

- Space Utilization
  - Identify course access bottlenecks
  - Better leverage existing space

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50% Classroom Utilization
33% Underutilized Sections
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Pinpointing Courses for High-Impact Redesign

High-Enrollment, Low-Completion Courses Targets for “Flipping”

Course Persistence¹ by Total Enrollment

1) “Persistence” defined as ratio of earned credits to attempted credits.

A Little Can Mean a Lot

Additional completions from increasing average completion rate across all sections of English 101 by 5%

Source: EAB interviews and analysis.
High DFW Variability Within a Course Demands Further Analysis

**Success Rates Vary Drastically, Even Within a Single Course**
*Pass Rates by Section and by Course, Fall 2013, Public Master’s University*

<table>
<thead>
<tr>
<th>Course</th>
<th>Pass Rate</th>
</tr>
</thead>
<tbody>
<tr>
<td>Acc201</td>
<td>47%</td>
</tr>
<tr>
<td>Bio101</td>
<td>69%</td>
</tr>
<tr>
<td>Psy200</td>
<td>58%</td>
</tr>
</tbody>
</table>

“...the greatest (financial) impact we can make at our institution is by focusing our attention on improving retention in our lower division courses.”

Chief Business Officer
Public Flagship Research Institution

Too Many AND Too Few
Bottleneck Courses as Much a Problem as Under-filled Sections

**Moving Towards the Sweet Spot**
*Share of Lower-Division Sections by Fill Rate, Public Master’s University*

- **80%** Lower-division courses outside the fill rate “sweet spot”
- **30%** Less than 70%
- **20%** 70 to 90%
- **50%** Greater than 90%

**How Can We Increase Bottleneck Capacity?**

New seats available from a 10% increase in capacity in high-demand courses at a public master’s university

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Source: Education Advisory Board, Gates Research Project
Saving Time for Everyone
Waitlist Tools in Existing ERPs Achieve Results Without New Investment

Percentage point reduction in seniors reporting course access as a reason for graduation delay: **13%**

Faculty hours saved on section overload management and analysis: **100s**

Dollars spent on new technology due to unused module in existing Banner ERP: **0**

“We’re now able to justify and create sections in a single day out of a special “bottleneck” fund, or see if slots are available in another section… We can also see where we haven’t filled a room for many years in a row and change the frequency of that course.”

Steven VanderStaay
Vice Provost for Undergraduate Education
Western Washington University

Source: EAB interviews and analysis

Finding and Reallocating Academic Resources
A Roadmap for Realizing Academic Ambitions

<table>
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</tr>
</tbody>
</table>

50% Classroom Utilization

33% Underutilized Sections

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60% Faculty Teaching Less than Standard Load
Reversing Unintentional Curriculum Creep
Course Offerings Growing Faster than Enrollments in Many Departments

Change in Course Offerings and SCH, 2009-2014

Simpler Can Be Better
Benchmarking Curricular Complexity

Complexity of Engineering Curricula at Three Comparably Ranked Departments

<table>
<thead>
<tr>
<th></th>
<th>Average Credit Hours Completed at Graduation</th>
<th>Min Credit Hours Required</th>
<th>Curricular Efficiency</th>
<th>Longest Course Sequence</th>
<th>Bottleneck Courses</th>
</tr>
</thead>
<tbody>
<tr>
<td>University A</td>
<td>180</td>
<td>133</td>
<td>4.6</td>
<td>9</td>
<td>8</td>
</tr>
<tr>
<td>University B</td>
<td>148</td>
<td>120</td>
<td>2.5</td>
<td>6</td>
<td>2</td>
</tr>
<tr>
<td>University C</td>
<td>168</td>
<td>128</td>
<td>2.6</td>
<td>7</td>
<td>2</td>
</tr>
</tbody>
</table>

The Rewards of Curricular Reform

Reducing Complexity Creates Real Benefits

Consolidation of Non-Degree Tracks...

- Reduced courses not counting for graduation from 16 to 0
- Reduced frequency of low-demand courses, canceled or combined 4
- Eliminated ~10 coordinator/director positions (plus releases)

Improved Both Faculty Productivity...

<table>
<thead>
<tr>
<th>2007-08</th>
<th>2012-13</th>
</tr>
</thead>
<tbody>
<tr>
<td>Avg. Teaching Load (Tenured)</td>
<td>3/2 → 2/2</td>
</tr>
<tr>
<td>Research/ Creative Production per FTE</td>
<td>4.4 → 8.9</td>
</tr>
<tr>
<td>Teaching/Advising Awards per FTE</td>
<td>1.3 → 10.1</td>
</tr>
</tbody>
</table>

... and Student Success

<table>
<thead>
<tr>
<th>2008 Cohort</th>
<th>2009 Cohort</th>
</tr>
</thead>
<tbody>
<tr>
<td>4yr Graduation Rate</td>
<td>47% → 61%</td>
</tr>
</tbody>
</table>

Source: Iowa State University Greenlee School of Journalism, "Greenlee Facts," accessible at https://www.jlmc.iastate.edu/greenlee-facts; EAB interviews and analysis

A Taxonomy of Curricular Problems

Array of Curricular Issues Impacts Student Success, Increases Costs

Common Curricular Problems

<table>
<thead>
<tr>
<th>Tracks and Specializations</th>
<th>STOP Excessive Pre-Requisites</th>
<th>Tripartite Course Sequences</th>
<th>Courses Not Counting For Degree</th>
<th>Large Lower-Division Catalog</th>
</tr>
</thead>
</table>

**Student Success Consequences**

- Often Not Required for Graduation
- Tracks May Not "Count" on Degree
- Delay Degree Progress
- Increase Time-to-Degree
- Often Unnecessary under Semesters
- Consume Course Time Without Progression
- Provides "Free Electives" That Often Don't Lead to Degree

**Financial Consequences**

- High Course Frequency Required
- Artificially Small Upper-Division Courses
- Upper Reaches of Sequence Typically Under-enrolled
- Longer TTD Leads to Bigger Bottlenecks
- Degrees, Not Courses, Drive Demand

Source: EAB interviews and analysis
Finding and Reallocationing Academic Resources

A Roadmap for Realizing Academic Ambitions

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The Myth of the Faculty Leisure Class

Faculty Shouldering More Hours, More Demands, In More Areas

- Teaching
  - Political pressure to increase undergraduate throughput without new funding
  - Popular enthusiasm for non-traditional modalities or “competency-based” learning
  - Outcomes assessment increasingly time-consuming

- Research
  - Stagnating grant funding makes grant administration increasingly high-stakes
  - Decline of the tenured professoriate and elimination of mandatory retirement raises P&T standards

- Service/Administration
  - Department chair and dean jobs increasingly professionalized, high-skill (especially as RCM spreads)

Is It “Standard” If No One’s Doing It?

Large Share of Faculty Time Released or Unaccounted For

Overwhelming Majority of Faculty Don’t Work Standard Load...

Share of Faculty by Load Status¹, Public Master’s University

- Underload: 62%
- Standard Load: 16%
- Overload: 23%

... Especially at Research Institutions?

57% Share of FT faculty teaching capacity utilized
(Representative Department, Public Research Institution)

The Primary Reasons for “Underloading”

- Research Releases
- Service/Admin Releases
- Insufficient Demand
- Alternative Compensation

Who’s Minding the Shop?

“There is a black market on campus for overload, supplemental pay, and reduced loads – no one has any data on this.”

Vice Provost
Public Master’s University

Faculty Workload: Actual vs. Potential

When Departments Need More Faculty to Teach More Students

How Much Capacity Would We Gain if One-Quarter of Underload Faculty Taught A Standard Load?

<table>
<thead>
<tr>
<th>Department</th>
<th>Extra Teaching Capacity, by Department</th>
</tr>
</thead>
<tbody>
<tr>
<td>Biology</td>
<td>5 courses 125 seats</td>
</tr>
<tr>
<td>Chemistry</td>
<td>7 courses 135 seats</td>
</tr>
<tr>
<td>English</td>
<td>7 courses 120 seats</td>
</tr>
<tr>
<td>Mathematics</td>
<td>4 courses 85 seats</td>
</tr>
<tr>
<td>Psychology</td>
<td>4 courses 75 seats</td>
</tr>
</tbody>
</table>

Faculty Asked to Teach More
25% of Underload Instructors

Courses Added to Underload Faculty
(18 FCH – Workload) / 3

Average Class Size
Varies by Discipline

Source: EAB interviews and analysis.

¹ Standard load is 24 semester credit hours

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Calculating Excess Capacity

Significant Opportunities to Improve Outcomes With Existing Resources

Factors That Limit Instructional Capacity

Maximum Theoretical Capacity
(# of faculty x standard course load x max class size)

Instructional Capacity
(# of courses offered x max class size)

Total Seats Offered
(# of courses offered x actual class size)

Course Registrations
(actual course enrollments)

Course Completions
(credits earned)

Factors That Limit Instructional Capacity

Course Releases
Small Classes
Underfilled Sections
DFW Rate

Source: EAB interviews and analysis.

The Whole Hog

Holistic Reports a Starting Point for Workload Allocation, Assessment

Defining Key Indicators...

- Courses taught / assigned load
- Undergraduate SCH
- Master’s / PhD SCH
- Independent study SCH
- Lab SCH
- Books, book chapters, & reviews
- Journal articles
- Research expenditures
- Release time (in $)
- Creative compositions
- Exhibitions, performances, keynotes
- Conference/ poster presentations
- Editing books or book chapters
- Independent lectures
- Admin. release time

... For Holistic Assessment

Annual Review of Total Productivity
Dashboards provide single version of the truth for departmental “contribution to mission” meetings with provost’s team deans, chair, and interested faculty.

Avoids Measuring “Hours” or “% Time”
Moves productivity conversation away from irrelevant factors (time inputs) to value-driven factors (outputs, outcomes).

Department-Driven
Central facilitates discussions of dashboard metrics, but departments use local knowledge to decide appropriate workload adjustments.

$,17M

Adjunct funds re-allocated in A&S based on contribution-to-mission dashboards (~4% of total budget)

Source: Michael McGoff, “Faculty Contributions to Mission; Sine Qua non,” Presentation to SCUP 46 (2011), EAB interviews and analysis.
Bringing Rigor to Research Releases

Two Key Questions to Increase Value of Release Time

Traditional Allocation
- Departmental Benchmarks
  - ScatterShot: High performers often teach same workload as colleagues
  - Prospective: Based on promised, not demonstrated, productivity

Chair Supervision
- Reallocation Culturally Difficult: Semi-permanent nature of releases makes chairs unwilling to cut them
- Lack of Clear Expectations: Releases not tied to efficiency or quality standards

Metric-Informed Allocation
- Demonstrated Productivity
  - Targeted: Guides scarce release time to high-productivity researchers
  - Reactive: Reduces uncertainty of “betting on” increased productivity

Renewable Agreements
- “Off-Ramps”: Frequent renewal provides opportunity to reallocate
- Performance Standards: Grantees expected to produce within a window of time or to a certain quality

Faculty-Driven Metrics in Action

Course Release Incentives Can Emphasize Quality Over Quantity

Data-Driven Research Release Policy
- Points earned for every publication over last 5 yrs, modified by journal quality...
  - A+: 18 points
  - A: 13 points
  - A-: 10 points
  - B: 8 points
  - C: 3 points
- ... and converted into course releases for the coming year.
  - 15 Points: 1 release
  - 24 Points: 2 releases
  - 36 Points: 3 releases
  - 48 Points: 3 releases + monetary award

Metrics for Ranking “A” Journals:
- Acceptance rate (e.g., A+ = <13%)
- Impact factor
- Peer-reviewed journal rankings
- Other university journal rankings
- “Reputation” of editorial board members

Faculty Establish Journal Rankings: Faculty advisory committee assigns ranks based on self-selected principles (e.g., acceptance rate, impact factor)

Although total publications declined slightly... Total Articles: 2009 131 → 2012 124
“A” Articles: 2009 22 → 2012 38
... high-quality publications increased by >70% through 2012.
Supporting the University’s Most Precious Resource
Aligning Faculty Effort with Institutional Goals

Four Key Challenges to Aligning Workload Assignments with Mission

1. Improved Assessment: Giving faculty credit for all they do
2. Research Releases: Targeting releases to the most productive faculty
3. Admin/Service Releases: Reducing time on non-critical activities
4. Specialized Teaching: Ensuring quality teaching while supporting research

Rebalancing the Program Portfolio
Keeping “Sticky” Instructional Capacity Aligned with Student Demand

Turning the Battleship
Institutional Program Portfolio (Illustrative)

Source: EAB interviews and analysis.
Reallocate Resources

Why Cutting Programs Won’t Solve Your Problems
Cutting Programs Is Politically Difficult, Rarely Frees Up Significant Resources

The Limitations of Program Cuts

1. Program cuts do not save significant amounts of money unless they involve faculty cutbacks
2. Savings from program cuts take a long time to realize
3. Indiscriminately cutting small programs can have unintended negative consequences
4. Many cuts are to programs or courses that do not really exist
5. Often, there is no tracking of actual savings realized after program cuts
6. Faculty in consolidated programs or departments often fail to integrate
7. Larger savings require larger scale consolidations

Not a Short-Term Fix

"I do not see prioritization as a means of solving our immediate budget problems. The primary benefit from prioritization is that it allows us to identify those programs and services that will benefit from new enrollment-growth money as it becomes available. Recombining, reducing and phasing out programs and services will free up funds over time but not immediately."

Provost, Public Research Institution

A University’s Most Valuable Resource
Increasing Pressure to Allocate Lines in Accordance with Priorities

<table>
<thead>
<tr>
<th>Faculty Line Stays in Department</th>
<th>Faculty Line Reverts to Dean</th>
<th>Faculty Line Reverts to Provost</th>
</tr>
</thead>
<tbody>
<tr>
<td>Provost</td>
<td>Dean</td>
<td>College of Engineering</td>
</tr>
<tr>
<td>Dean</td>
<td>Department</td>
<td>Spanish Department</td>
</tr>
<tr>
<td>Faculty Line Reverts to Provost</td>
<td>English Department</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Classics Department</td>
<td></td>
</tr>
</tbody>
</table>

Observed Frequency

40% 40% 20%

Source: EAB interviews and analysis.
## Why Haven’t We Done This Already?

### Four Roadblocks to Improved Academic Resource Management

<p>| | |</p>
<table>
<thead>
<tr>
<th></th>
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</tr>
</thead>
<tbody>
<tr>
<td><strong>1</strong></td>
<td><strong>2</strong></td>
</tr>
<tr>
<td><strong>Incomplete, Inaccurate Data</strong></td>
<td><strong>Ad Hoc Allocation Processes</strong></td>
</tr>
<tr>
<td>Data related to academic resources spread among multiple ERPs and shadow systems of varying quality</td>
<td>Even when metrics are available, unit leaders struggle to design policy interventions to advance their goals</td>
</tr>
<tr>
<td><strong>3</strong></td>
<td><strong>4</strong></td>
</tr>
<tr>
<td><strong>Lack of Unit-Level Incentives</strong></td>
<td><strong>Few Reallocation Options</strong></td>
</tr>
<tr>
<td>Heads (and some deans) skeptical that departments will receive benefits from their efficiency gains</td>
<td>Difficult to reallocate specialized faculty from areas of low demand to areas of high demand</td>
</tr>
</tbody>
</table>

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## EAB Contact Information

**Ron Yanosky**  
Director, Strategic Research  
202-568-7956  
RYanosky@eab.com

**Monica Wilson**  
Dedicated Advisor  
(202) 909-4363  
MWilson@eab.com

[www.eab.com](http://www.eab.com)