



Fiscal Note and Budget Item Follow-Up Report

Executive Appropriations Committee

ISSUE BRIEF

SUMMARY

This report follows-up on select fiscal notes and budget actions from past legislative sessions. For each item, the report includes a stop light (red, yellow, green) for implementation status, budget accuracy, and, where available, performance. It details original cost and/or revenue estimates, legislative appropriations, and actual experience. It is intended to create a feed-back loop that improves future estimates and initiatives.

The report is organized by Appropriations Subcommittee, year, and type of follow-up item. The report contains items from the 2012 through the 2014 legislative General Sessions, which is indicated in the top left corner of the page. Fiscal notes of bills passed during a legislative session are prefixed with the bill number.

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FISCAL NOTE AND BUDGET ITEM FOLLOW-UP REPORT

2014 G.S. Mission-Based Funding - Distinctive Mission

Committee: HED

Analyst: Spencer Pratt

Cost Estimate	Revenue Estimate	Original Approp.	Changes	Subtotal	Experienced	Difference
\$7,000,000	\$0	\$7,000,000	\$0	\$7,000,000	\$7,000,000	\$0

Explanation

In the 2014 General Session, the Legislature approved a total of \$7,000,000 to be distributed to each of the eight USHE institutions and the State Board of Regents to help them move toward their specific mission-related goals, including increasing participation, completion, and economic development. The following lists the amount approved for each institution in each category:

- University of Utah - \$1,050,000 for two participation initiatives and \$1,070,900 for two completion initiatives
- Utah State University - \$1,378,200 for four participation initiatives and \$67,600 for one completion initiative
- Weber State University - \$726,300 for one participation initiative
- Southern Utah University - \$321,900 for two participation initiatives
- Utah Valley University - \$240,300 for two participation initiatives, \$314,700 for two completion initiatives, and \$301,400 for two economic development initiatives
- Dixie State University - \$278,900 for one participation initiative
- Snow College - \$189,100 for three completion initiatives
- Salt Lake Community College - \$818,200 for one participation initiative
- State Board of Regents - \$125,400 for two participation initiatives and \$117,100 for one economic development initiative

Implementation

The \$7 million funding level was distributed as discussed in the Higher Education Appropriations Subcommittee meetings during the 2014 General Session. Each USHE institution plus the State Board of Regents received a portion of the funding.

Accuracy

The appropriated amount for Mission-Based Funding was \$7 million. It was all appropriated and was directed by the institutions to their individual initiatives as shown above.

Performance

Short-term outcomes and assessments are included in each of the 26 initiatives. Over the long-run, general higher education performance measures that should be impacted by this funding include enrollments, retention rates, graduation rates, and degrees awarded. Because higher education is a multiple year endeavor, measures should move over time, but may not show change immediately.

FISCAL NOTE AND BUDGET ITEM FOLLOW-UP REPORT

2014 G.S. Mission-Based Funding - Equity

Committee: HED

Analyst: Spencer Pratt

Cost Estimate	Revenue Estimate	Original Approp.	Changes	Subtotal	Experienced	Difference
\$50,000,000	\$0	\$50,000,000	\$0	\$50,000,000	\$50,000,000	\$0

Explanation

Because of uneven growth and uneven appropriations at institutions of higher education, the legislature approved funding to those institutions that were at or below 90 percent of the regional average funding per resident undergraduate FTE student. The \$50 million appropriation was distributed to: Utah State University - Regional Campuses (\$5,617,000); Weber State University (\$4,447,700); Dixie State University (\$3,249,000); Utah Valley University (\$21,110,000); and Salt Lake Community College (\$15,576,300).

Implementation

The \$50 million funding level was distributed as discussed in the Higher Education Appropriations Subcommittee meetings during the 2014 General Session. Five USHE institutions received funding; three did not.

Accuracy

The funding allocation was approved in accordance with the criteria established that addressed average funding per resident undergraduate FTE student that was at or below 90 percent of the regional level. The actual amounts were determined by the funding formula.

Performance

General higher education performance measures that should be impacted by this funding include enrollments, retention rates, graduation rates, and degrees awarded. Because higher education is a multiple year endeavor, measures should move over time, but may not show change immediately.

FISCAL NOTE AND BUDGET ITEM FOLLOW-UP REPORT

2014 G.S. Performance-based Funding

Committee: HED

Analyst: Spencer Pratt

Cost Estimate	Revenue Estimate	Original Approp.	Changes	Subtotal	Experienced	Difference
\$1,500,000	\$0	\$1,500,000	\$0	\$1,500,000	\$1,500,000	\$0

Explanation

Performance-based funding began in the 2013 General Session when \$1 million in one-time funding was approved. Intent language guided its usage. The following year, the legislature increased the allocation to \$1.5 million (again, one-time). The purpose of this funding is to move focus and attention to outcomes, rather than inputs. Each USHE institutions proposed core performance measures in the areas of retention, completion, math, and graduate education. Institutions that met their goals would receive the designated portion of the appropriation.

Implementation

The Board of Regents approved the distribution schedule for the \$1.5 million as follows:

University of Utah and Utah State University - \$328,620 each

Weber State University, Utah Valley University, and Salt Lake Community College - \$197,170 each

Southern Utah University, Dixie State University, and Snow College - \$131,450 each

In addition, the Board approved each institutions' performance measurements, benchmarks, and specific measures

Accuracy

The funding level of \$1.5 million was allocated, but actual distribution will occur following determination of whether the goals were met.

Performance

Each institution established specific measures that would fit into one or more of the core performance measures of retention, completion, math, and graduate education, as shown below:

University of Utah - retention, completion, math, and graduation education

Utah State University - recruitment and enrollment

Weber State University - retention, completion, and math

Southern Utah University - math

Utah Valley University - completion and math

Dixie State University - retention and math

Snow College - math

Salt Lake Community College - math

FISCAL NOTE AND BUDGET ITEM FOLLOW-UP REPORT

2014 G.S. Campus Capacity

Committee: HED

Analyst: Angela Oh

Cost Estimate	Revenue Estimate	Original Approp.	Changes	Subtotal	Experienced	Difference
\$3,000,000	\$0	\$3,000,000	\$0	\$3,000,000	\$3,000,000	\$0

Explanation

To respond to capacity needs, the Legislature appropriated \$3.0 million to the Utah College of Applied Technology (UCAT) to create and/or expand existing programs where capacity could not meet industry demand in each service region.

Implementation

Each applied technology college (ATC) utilized their portion of funding to programs identified in their service regions as high demand. For example, Nursing, Composites, Heavy Duty Diesel, Automotive Technology, and Dental Assistant programs were targeted.

The following shows how the \$3.0 million appropriation was spread amongst each ATC:

- Bridgerland ATC: \$441,000
- Davis ATC: \$488,200
- Dixie ATC: \$294,000
- Mountainland ATC: \$423,200
- Ogden-Weber ATC: \$457,600
- Southwest ATC: \$292,500
- Tooele ATC: \$272,200
- Uintah Basin ATC: \$331,300

Accuracy

Each ATC utilized the full appropriation to increase capacity by establishing or expanding programs in high demand.

Performance

Fiscal year (FY) 2015 student data is not yet finalized; however, preliminary data shows that there has been a three percent increase in total student headcount over FY 2014 at the end of the third quarter of FY 2015.

FISCAL NOTE AND BUDGET ITEM FOLLOW-UP REPORT

2014 G.S. USU Graduate School

Committee: HED

Analyst: Spencer Pratt

Cost Estimate	Revenue Estimate	Original Approp.	Changes	Subtotal	Experienced	Difference
\$1,000,000	\$0	\$1,000,000	\$0	\$1,000,000	\$1,000,000	\$0

Explanation

The 2014 Legislature approved \$500,000 ongoing funding and \$500,000 one-time funding to enhance and improve graduate school programs at Utah State University.

Implementation

Utah State University is expending both the one-time funding and the ongoing funding in FY 2015 and subsequent years in the following areas:

- More fellow awards in the Presidential Doctoral Research Fellows program
- More PhD and MS student assistantships, leveraging state funds
- Graduate student recruitment and admissions
- Library support
- PhD research
- Development of external partners to invest in graduate students and their research

Accuracy

The one-time funding is fully expended; the ongoing funding is fully expended in FY 2015 and allocated for the above-mentioned items for subsequent years.

Performance

The number of Presidential Doctoral Research Fellows has increased to 44. By leveraging the state funds, 15 PhD and 22 MS students have been funded. One college is working on development to support future graduate work. Recruitment software has been purchased and is being implemented. Journal subscriptions have been purchased for the library.

FISCAL NOTE AND BUDGET ITEM FOLLOW-UP REPORT

2014 G.S. S.B. 38 - Snow College Concurrent Education Program

Committee: HED

Analyst: Spencer Pratt

Cost Estimate	Revenue Estimate	Original Approp.	Changes	Subtotal	Experienced	Difference
\$1,300,000	\$0	\$1,300,000	\$0	\$1,300,000	\$1,031,274	\$268,726

Explanation

The goal of S.B. 38, Snow College Concurrent Enrollment passed by the 2014 Legislature, is to make concurrent enrollment education opportunities available to students statewide. The funding of \$1,300,000 allows Snow College to broadcast college classes via Interactive Video Conferencing (IVC) to participating high schools throughout the state.

Implementation

Snow College utilized the funding to add new faculty and shuffle faculty assignments to accommodate the new IVC classes. Snow College added the equivalent of ten full-time faculty. In addition, the College hired three academic advisors who work with high school students throughout the state to align students' education and career goals. Snow College also hired a full-time program director and IVC assistant.

Accuracy

The current level of funding was projected to cover personnel costs and equipment. Personnel costs will utilize most of the remaining balance through FY 2015. In the future, equipment costs will be minimal, but a couple of new instructors will be added.

Performance

Snow College will be tracking the number of schools and the number of students who participate in the program. Along with the number of credit hours earned.

FISCAL NOTE AND BUDGET ITEM FOLLOW-UP REPORT

2014 G.S. College Readiness Initiative

Committee: HED

Analyst: Spencer Pratt

Cost Estimate	Revenue Estimate	Original Approp.	Changes	Subtotal	Experienced	Difference
\$1,000,000	\$0	\$1,000,000	\$0	\$1,000,000	\$320,774	\$679,226

Explanation

During the 2014 General Session, the Legislature approved \$1 million for the State Board of Regents to support college readiness efforts. The funding was allocated to: (1) StepUP READY grants (\$600,000) to school districts/LEAs to increase efforts in college preparation, enrollment, and first-year retention; and (2) sustainment of college-ready activities that were funded with one-time funds.

Implementation

Six grants were approved and funded. These include:

University of Utah - \$8,800 for one grant

Utah State University - \$21,477 for two grants

Utah Valley University - \$61 for one grant

Dixie State University - \$25,000 for one grant

Syracuse High School - \$24,942 for one grant

In addition, \$240,494 has been used to sustain existing college-ready activities, including Utah Scholars Initiative, College Applications Week and the Annual USHE Counselor Conference.

Accuracy

Since the grants are available on an 18-month timeline, additional requests and funding disbursements are anticipated through the end of 2015.

Performance

Expected outcomes were included in each grant approved. In addition, general higher education performance measures that should be impacted include enrollments, retention rates, graduation rates, and degrees awarded. Because higher education is a multiple year endeavor, measures should move over time, but may not show change immediately.

FISCAL NOTE AND BUDGET ITEM FOLLOW-UP REPORT

2014 G.S. Campus Equity

Committee: HED

Analyst: Angela Oh

Cost Estimate	Revenue Estimate	Original Approp.	Changes	Subtotal	Experienced	Difference
\$3,000,000	\$0	\$3,000,000	\$0	\$3,000,000	\$3,000,000	\$0

Explanation

To respond to equity needs, the Legislature appropriated \$3.0 million to the Utah College of Applied Technology (UCAT) to ensure that each service region was adequately funded. This funding was determined by population and current service levels.

Implementation

Each applied technology college (ATC) determined program demands and existing deficiencies in staffing to accommodate program expansions. The majority of equity funding was used on personnel services.

The following shows how the \$3.0 million appropriation was spread amongst each ATC:

- Bridgerland ATC: \$151,900
- Davis ATC: \$502,800
- Dixie ATC: \$311,700
- Mountainland ATC: \$1,617,200
- Ogden-Weber ATC: \$213,900
- Southwest ATC: \$66,500
- Tooele ATC: \$86,400
- Uintah Basin ATC: \$49,600

Accuracy

Each ATC utilized the full appropriation to primarily hire additional staff to enhance program offerings.

Performance

Fiscal year (FY) 2015 student data is not yet finalized; however, preliminary data shows that there has been an 18 percent increase in program certificates over FY 2014 at the end of the third quarter of FY 2015.

FISCAL NOTE AND BUDGET ITEM FOLLOW-UP REPORT

2014 G.S. Custom Fit

Committee: HED

Analyst: Angela Oh

Cost Estimate	Revenue Estimate	Original Approp.	Changes	Subtotal	Experienced	Difference
\$500,000	\$0	\$500,000	\$0	\$500,000	\$500,000	\$0

Explanation

The Custom Fit program administered by the Utah College of Applied Technology (UCAT) supports economic and workforce development through training partnerships with Utah companies. The Legislature appropriated \$500,000 to UCAT to expand Custom Fit training statewide with a special emphasis in the manufacturing industry.

Implementation

The funding per service region was determined based on consultation with UCAT Campus Presidents, Custom Fit Directors, and the UCAT Board of Trustees to determine the best and most equitable division of funds across the several service regions.

The following shows how the \$500,000 appropriation was allocated:

- Bridgerland ATC: \$70,000
- Davis ATC: \$70,000
- Dixie ATC: \$35,000
- Mountainland ATC: \$70,000
- Ogden-Weber ATC: \$70,000
- Southwest ATC: \$35,000
- Tooele ATC: \$40,000
- Uintah Basin ATC: \$40,000
- Snow College: \$35,000
- USU-Eastern: \$35,000

Accuracy

The total appropriation of \$500,000 was fully expended as of May 31, 2015.

Performance

UCAT provides an annual Custom Fit report that is presented to the Higher Education Appropriations Subcommittee each General Session. At the time of publication, the 2015 report had not been finalized. It is anticipated that that total number of trainees and total number of training hours will increase from 2014.

FISCAL NOTE AND BUDGET ITEM FOLLOW-UP REPORT

2014 G.S. Scholarships for Students with Intellectual Disabilities

Committee: HED

Analyst: Angela Oh

Cost Estimate	Revenue Estimate	Original Approp.	Changes	Subtotal	Experienced	Difference
\$100,000	\$0	\$100,000	\$0	\$100,000	\$14,100	\$85,900

Explanation

The Legislature appropriated \$100,000 one-time to the Utah College of Applied Technology (UCAT) to help develop innovative opportunities, in consultation with the Utah Developmental Disabilities Council, for adults with significant intellectual or developmental disabilities. The goal was to help these students gain skills in career and technical education programs that lead to integrated gainful employment in their local communities.

Implementation

A panel composed of selected UCAT trustees and members of the Utah Developmental Disabilities Council reviewed proposals from several UCAT campuses and awarded the funding to Southwest Applied Technology College (SWATC). The program began as a self-paced program, but due to feedback from students, starting in August, the program will be instructor-led with three different schedules.

Accuracy

As of publication, SWATC has expended \$14,100 of the \$100,000 appropriation. SWATC has anticipated that it will spend the remaining balance by the end of the calendar year (with funding primarily being used on personnel services and materials/supplies).

Performance

Curriculum has been developed and training began in January 2015 and the first students completed training in February.

FISCAL NOTE AND BUDGET ITEM FOLLOW-UP REPORT

2014 G.S. Marketing and Messaging Fund

Committee: HED

Analyst: Angela Oh

Cost Estimate	Revenue Estimate	Original Approp.	Changes	Subtotal	Experienced	Difference
\$200,000	\$0	\$200,000	\$0	\$200,000	\$199,100	\$900

Explanation

The Legislature appropriated \$200,000 one-time to the Utah College of Applied Technology (UCAT) for marketing UCAT and its programs throughout the State. A portion of funding was also used to create the first annual UCAT Student of the Year competition.

Implementation

Expenditures and marketing efforts were directed by the UCAT Director of Public Relations along with a steering committee comprised of UCAT administrators and members of the Board of Trustees.

Accuracy

UCAT has utilized the appropriation to market the UCAT system and their programs through outlets such as tv spots, Pandora radio advertisements, and online advertising.

Performance

Fiscal year (FY) 2015 student data is not yet finalized; however, preliminary data shows that there has been a 4 percent increase in total membership hours over FY 2014 at the end of the third quarter of FY 2015.

FISCAL NOTE AND BUDGET ITEM FOLLOW-UP REPORT

2014 G.S. USU Extension Water Conservation

Committee: HED

Analyst: Spencer Pratt

Cost Estimate	Revenue Estimate	Original Approp.	Changes	Subtotal	Experienced	Difference
\$500,000	\$0	\$500,000	\$0	\$500,000	\$247,413	\$252,587

Explanation

A one-time appropriation of \$500,000 was approved for Utah State University's Cooperative Extension to enhance water conservation and management programs.

Implementation

The following projects and programs were funded with this allocation:

Youth Education - four workshops at the Utah Botanical Center, Swaner Preserve and EcoCenter, and Thanksgiving Point

Center for Water Efficient Landscaping - studying breeding of Kentucky bluegrass for salt and drought tolerance

Water Check Program - develop a mobile app to collect data, make calculations, and produce educational materials and reports to program participants

Utah Botanical Center - developed a new plant research and demonstration garden

Master Gardner Program - support the Urban and Small Farms Conference

Water MAPS - adapted software to become a more widely applicable tool for Utah water agencies

Irrigation Water Management - purchase of water meters and fittings for home and community gardens

Water Reduction in Vegetable Production - purchase soil moisture sensors and data loggers to measure water reduction techniques

Projects were determined through requests for proposals. Mid-year and Year-end reports were required.

Accuracy

The amount appropriated was \$500,000. All of it has been allocated for the projects listed above. The remaining balance will be used to complete the projects.

Performance

Specific measures were identified for each of the programs listed in the Implementation section of this report. Data continued to be collected to support the measures. For example, in the Water Check Program, with the new database, the total area of turf grass evaluated in a specific water district may be determined annually. This information can then be associated with water savings to help guide water conservancy districts.