ACADEMIC PORTFOLIO TASK FORCE

CO-CHAIR
Axel Drees
Distinguished Professor and Chair, Physics and Astronomy Faculty, CAS

CO-CHAIR
Leonie Huddy
Professor and Chair, Political Science Faculty, CAS

MODERATOR
Rose Martinelli
Vice President for Strategic Initiatives

FAR BEYOND
ACADEMIC PORTFOLIO TASK FORCE MISSION

Achieving Financial Sustainability

INFORMATION

stonybrook.edu/financial-sustainability

CO-CHAIRS

Axel Drees
Leonie Huddy
Staff members from Finance, Budget, IT and data experts will provide resources and advice to the task forces, working groups and leadership.

Each task force will have a project liaison to support coordination, note taking and other project activities.
Project Timeline

STEP 1
DEFINITION & DESIGN
OCTOBER 1
1. Define and finalize scope
2. Form working groups as needed
3. Define information needs
4. Establish project plan

STEP 2
OPPORTUNITY IDENTIFICATION
MID-DECEMBER 2020
1. Engagement—listening sessions, surveys, etc.
2. Group working sessions
3. Initial opportunity prioritization

STEP 3
ANALYSIS & VALIDATION
END MARCH 2021
1. Cost savings/revenue enhancement
2. Cost/benefit analysis
3. Risk assessment
4. Final opportunity prioritization

STEP 4
RECOMMENDATIONS
END APRIL 2021
1. Desired actions
2. Implementation timeline
3. Metrics
4. Project plan

INDIVIDUAL TASK FORCE RESPONSIBILITIES

- Ensure strategic alignment
- Leveraging collaboration opportunities
- Coordinating support from technical support group
- Providing regular updates to SBU community on status
Academic Portfolio

Academic Programs of all Schools/Colleges

• 11 schools and colleges with 270+ degree programs run by ~ 100 units
  • ~ 75 undergraduate majors and 40 minors serving 17,000 students
  • ~ 50 doctoral programs serving 3,200 students
  • ~ 80 master’s programs serving 4,700 students
  • More than 25 certificate programs serving 900 students
• Suite of nondegree-granting and continuing education programs
The Academic Portfolio Task Force is charged with initiating discussions with academic units on how to optimize the size, capacity and scope of their undergraduate, graduate, professional and nondegree-granting programs. It will also make recommendations about the resources academic units require to strengthen existing programs, launch new initiatives, forge interdisciplinary connections and develop creative new streams of revenue. The maintenance of Stony Brook University’s scholarly and research mission will be central to this process. Other factors taken into consideration in evaluating programs include existing faculty resources, student demand, student success, student career opportunities and finances.
Examples of Revenue Approaches:
• Expand continuing/professional education
• Expanded/new master’s programs
• New interdisciplinary UG programs

Examples of Cost Reduction:
• Reduce administrative burden on faculty
• Remove redundancies

Examples of Process Improvements:
• Streamline program development and approval process
Who Is Involved

Academic Portfolio Task Force and related working groups: ~55 members

- Representing 11 schools and colleges plus units supporting programs
- 34 faculty; most with leadership experience
  - 18 at department/program level
  - 13 at dean’s office level
- 20 staff from key areas
Who Is Involved — TF Members

**Academic Portfolio**

**Task Force**

**Co-Chairs**

- **Axel Drees**  
  Distinguished Professor and Chair, Physics & Astronomy, CAS

- **Leonie Huddy**  
  Professor and Chair, Political Science, CAS

**Members**

- **Brenda Anderson** Professor, Psychology, CAS
- **Katherine Aubrecht** Associate Professor, Head of Sustainability Studies, CAS/SOMAS
- **Monica Bugallo** Professor, Electrical and Computer Engineering, CEAS
- **Dolores Cannella** Associate Professor, Associate Dean, DS
- **Carol Delia Ratta** Clinical Associate Professor, Associate Dean; SoN
- **Kara DeSanna** Assistant Provost, Office of the Provost
- **Lisa Diedrich** Professor and Chair of Women's Gender and Sexuality Studies, CAS
- **Peter Gergen** Distinguished Service Professor, Biochemistry and Cell Biology; Chair, UG Biology, CAS
- **Rachelle Germana** Interim Vice Provost, Office of the Provost
- **Kane Gillespie** Director of Academic Assessment, Office of the Provost
- **Dmytro Holod** Associate Professor, Associate Dean, COB
- **Braden Hosch** Associate Vice President for Institutional Research, Planning and Effectiveness
- **Tracey Iorio** Assistant Director, Academic and Transfer Advising Services
- **Mary Kritzer** Distinguished Service Professor, Neurobiology and Behavior, SoM
- **Laura Lindenfeld** Professor, Journalism, Dean, SoJ
- **Robert Mangione** Executive Director, SPD
- **Heather Montague** Associate Vice President, Office of the Provost
- **Richard Morgan** Clinical Associate Professor, Associate Dean, SSW
- **Hants Williams** Assistant Professor, SHTM
- **Urszula Zalewski** Director of Experiential Education, Career Center
What We Have Learned

• Professional, continuing education, nondegree programs are underdeveloped at SBU; it’s a potentially lucrative market

• Room for growth in MA/MS programs, which are currently concentrated in health sciences, SPD and CEAS; less than 10% of students in CAS programs

• The current tuition-sharing program does not provide an effective incentive (MA/MS, summer, winter); in most areas, funds are not readily at the department/unit level; incentives do not promote the development of interdisciplinary programs

• The SBU, SUNY and NYSED approval program process is cumbersome and inefficient

• Program development and maintenance are left to departments/units that have too few resources to assess program demand, market programs or assess their outcomes
Opportunities

- **Expand tuition revenue through the development of innovative professional and continuing education, nondegree and master’s programs;** increase UG programs/majors that attract out-of-state students

- **Develop a new tuition-sharing model** that eschews benchmarks for a clearer and more transparent formula to encourage the development of new innovative programs; ensure that wealth is also shared

- **Develop a central program incubator** to assist in the evaluation of program demand, streamline program proposals, provide initial seed funds and help with program marketing and assessment

- **Streamline the program approval process** through the creation of a successful proposal repository, online video tutorials on proposal preparation

- **Improve graduate program maintenance and assessment tools** to assist departments/units with marketing, recruitment and alumni tracking; tools to assess enrollment, tuition and credits
### What's Next?

<table>
<thead>
<tr>
<th>Working Groups</th>
<th>Description</th>
<th>Project Type</th>
<th>Co-Chairs</th>
</tr>
</thead>
<tbody>
<tr>
<td>Professional and Continuing Nondegree Programs</td>
<td>Expand professional and continuing nondegree programs (~$4.8M last year)</td>
<td>New Revenue</td>
<td>• Sarah Jourdain, chair, European Languages, Literatures and Cultures (CAS)</td>
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<tr>
<td></td>
<td></td>
<td></td>
<td>• Karen Mendelsohn, assistant dean (SHTM)</td>
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<tr>
<td>Tuition Revenue Share Incentives</td>
<td>Develop a simple method to understand revenue-sharing incentive program to</td>
<td>Key Enabler</td>
<td>• Samir Das, chair, Computer Science (CEAS)</td>
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<tr>
<td></td>
<td>support graduate enrollment goals and objectives</td>
<td></td>
<td>• Saeedah Hickman, assistant dean, Administration and Finance (SHTM)</td>
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<tr>
<td>Streamline Development and Approval of Degree Programs</td>
<td>Improve processes for program approvals and develop incubator to accelerate new program starts</td>
<td>Process Improvement and Key Enabler</td>
<td>• Provost Team, SUNY and NYSED</td>
</tr>
</tbody>
</table>

**All groups are in progress.**
WG: Tuition Revenue Share Incentive

Co-Chairs

- **Samir Das**
  Professor and Chair, Computer Science, CEAS
- **Saeedah Hickman**
  Assistant Dean for Administration and Finance, SHTM

**Members**

- **Nick Candela** Director, Financial Planning and Analysis
- **Eva Carceles** Professor and Graduate Program Director, Economics, CAS
- **Axel Drees***,** Distinguished Professor and Chair, Physics and Astronomy, CAS
- **Erica Hackley** Assistant Dean, CAS
- **Braden Hosch** Associate Vice President for Institutional Research, Planning and Effectiveness
- **Robert Kukta** Acting Dean, CEAS and Senior Associate Dean for Education and Innovation
- **Eric Lamberg** Professor, Physical Therapy and Associate Dean, SHTM; Staff, SHTM, Dean's Office
- **Celia Marshik** Professor, English, CAS
- **Ray McKenna** Clinical Associate Professor, SHTM
- **Eli Mondesir** Director, Financial Planning and Analysis
- **Heather Montague** Associate Vice President, Office of the Provost
- **Arty Samuel** Distinguished Professor and Co-Chair, Psychology, CAS
- **Joyce Wellinger** Assistant Dean, CoB
- **Sherilyn Towne** Assistant Dean, SoN

* Member of Financial Sustainability Committee

** Member of Academic Portfolio Task Force
WG: Professional, Continuing, Nondegree Programs

Co-Chairs

• **Sarah Jourdain**
  Professor and Chair, European Languages, Literatures and Cultures, CAS

• **Karen Mendelsohn**
  Assistant Dean for Academic and Student Affairs, SHTM

Members

• **Dolores Cannella** Associate Professor, Associate Dean, DS
• **Jennifer Davidson** Director of Communications and Continuing Education, SSW
• **Carol Della Ratta** Clinical Associate Professor, Associate Dean, SoN
• **Peter Donnelly** Associate Vice President for Technology Partnerships
• **Kathleen Ehm** Assistant Dean for Graduate and Postdoctoral Initiatives, Graduate School
• **Stacey Finkelstein** Associate Professor, CoB
• **Perry Goldstein** Professor and Chair, Music, CAS
• **Tracey Iorio** Assistant Director, Academic and Transfer Advising Services
• **Angela Kelly** Associate Professor, Physics & Astronomy and iSTEM, CAS
• **Chris Kretz** Head of Academic Engagement, Libraries
• **Ken Lindblom** Professor, English, CAS
• **Laura Lindenfeld** Associate Professor, Journalism, Vice Provost & Dean, SoJ
• **Robert Mangione** Executive Director, SPD
• **JoanMarie Maniaci** Assistant Director of Student Affairs, Program in Public Health
• **Elizabeth Newman** Associate Professor, History, Vice Provost, Office of the Provost
• **Derek O’Connor** Director of Strategic Initiatives, SPD
• **Emmanuelle Pales-Espinosa** Research Associate Professor, SoMAS
• **Bob Reeves** Professor, English, Associate Provost, Southampton
• **Stan Uryasev** Professor, Applied Mathematics and Statistics, CEAS
• **Deborah Zelizer** Professor, SHTM and Chair Health Science

* Member of Financial Sustainability Committee
** Member of Academic Portfolio Taskforce
**Survey Update**

**2,230 Respondents**

<table>
<thead>
<tr>
<th>Role</th>
<th>Respondents</th>
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<tbody>
<tr>
<td>T/TT faculty</td>
<td>452</td>
</tr>
<tr>
<td>NTT faculty</td>
<td>303</td>
</tr>
<tr>
<td>West campus staff</td>
<td>804</td>
</tr>
<tr>
<td>HSC staff</td>
<td>176</td>
</tr>
<tr>
<td>Hospital/ LSVH</td>
<td>377</td>
</tr>
<tr>
<td>Other</td>
<td>118</td>
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**Overall Response Rate: 13%**

- Tenured/tenure-track faculty: 42%
- Non-tenure-track faculty: 14%
- West Campus Staff: 28%
- East Campus Staff: 10%
- Hospital / LI Vets Home: 5%

**54%**

- How closely have you followed the development of Stony Brook’s Strategic Budget Initiative?
  - Very closely: 13%
  - Somewhat closely: 41%
  - Not very closely: 31%
  - Not closely at all: 15%

**How are you getting information about SBU’s budget?**

- President’s letters on the Strategic Budget Initiative: 91%
- Virtual campus conversation: 41%
- Achieving Financial Sustainability website: 26%
- Participation in a SBI working group or Task Force: 9%
Thank you for joining us.

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