

# Workforce Planning to Ensure Financial Viability



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October 7, 2015



# Overview

1. Background for Workforce Plan
2. Timeline for the Process
3. Goals and Details of the Workforce Plan
4. Labor Issues
5. Academic Issues
6. Financial Outcomes
7. Lessons Learned

# Clarion University

- Masters Comprehensive Public Institution in Rural Northwestern PA
  - Part of the PA State System of Higher Education
  - Student Population of 6000 students
- RCM implemented in 2011
- Declining State Support
  - Upcoming Year = 24%
- Declining Enrollment
  - Fewer HS grads
  - Fewer job opportunities in education
- Unionized Campus

# Financial Challenges

- Revenue Drop
  - From 2010-11 to 2012-13
- Expense Increase
- Projected Depletion of Cash Reserves
- “Regulated” environment
  - Tuition & Fees set by State (avg. 3%)
  - Negotiated Personnel Expense Increases (avg. 6 %)

# Timeline – 18 months

**January 2013**

First Quarter of 2013 – Realization of Need to Reduce Expenses

Metrics Developed

Initial Meetings with Faculty Union and Affected Depts.

← Draft Workforce Plan Released - AUGUST

Open Forums & Public Communications

Workforce Plan Released - OCTOBER →

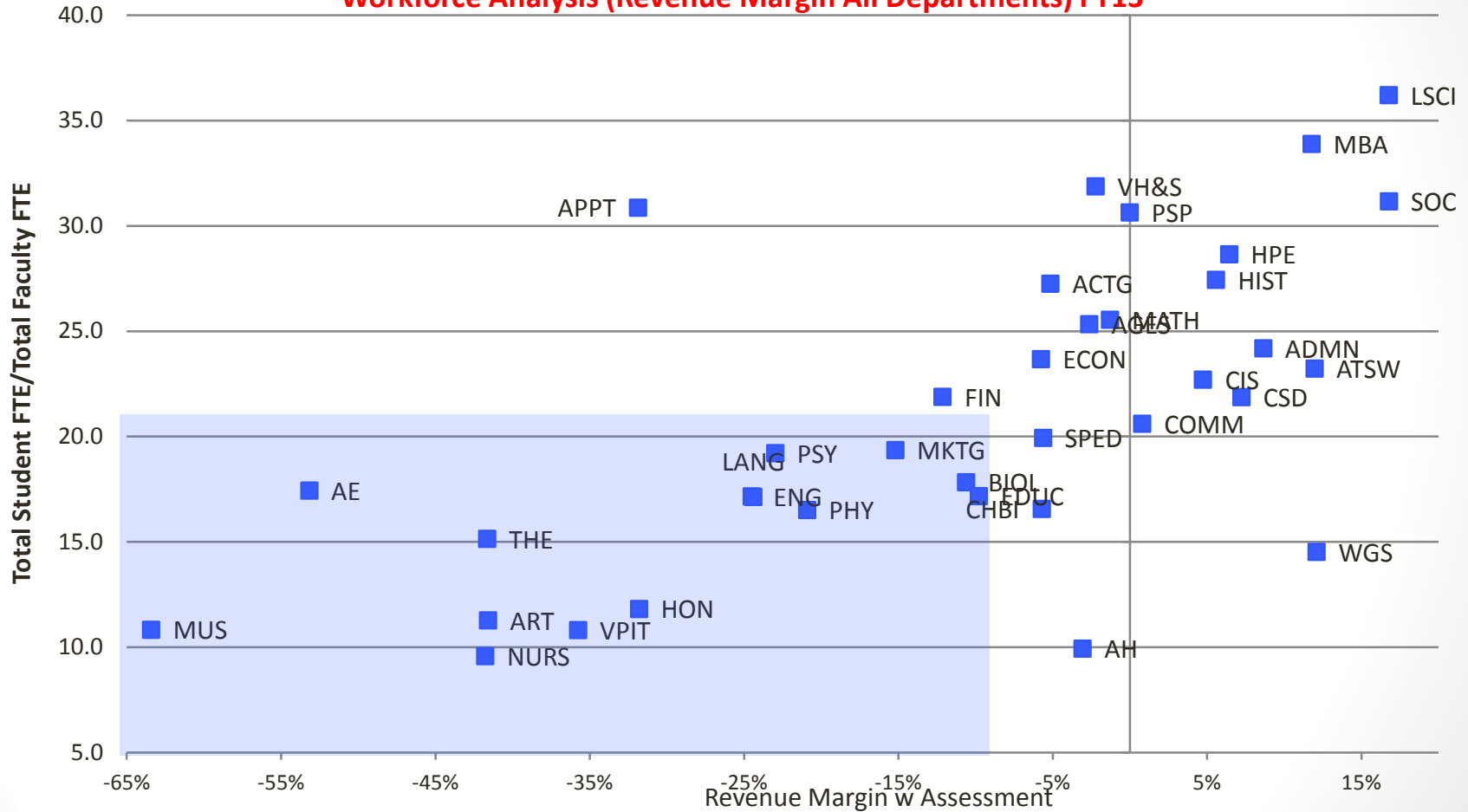
Continued Discussions and Personnel Adjustments

Academic Restructuring and Dept. Meetings – MARCH & APRIL

Implementation of New Academic Structure → **July 2014**

# Metrics Used in Program Evaluation

Workforce Analysis (Revenue Margin All Departments) FY13



# Workforce Plan Components

- Introduction
  - Focused on Strategic Initiatives and Mission
  - 3-year outlook
    - (\$12 m deficit; 51 FTE reduction over 2 years)
- Proposed Actions
  - Academic Colleges/Departments
  - Finance & Administration
  - Student Affairs
  - Academic Support
- Supporting Documents

# Labor Issues

- Dealing with multiple unions with different memberships and agendas.
- Tracking all of the position permutations



# Academic Issues

- Balancing faculty & student concerns with union contract.
- Programmatic changes (low-demand vs. high-demand programs)
  - Accreditation & teach-out plans
- The Student “Voice”?
- The local community & how it is represented

# Academic Issues

- Reorganization of academic colleges & departments.
- Hiring in high-demand areas lost in the discussion.
- Can you achieve results through attrition?

# Financial Outcomes

- Cost savings were realized.
- Set the tone for future budget planning sessions.
  - Retirements & Resignations
  - Additional Reorganization
  - New Positions

# Lessons Learned

1. Communication Plan needs to be in place
  - Internal
  - External
2. Length of Process
  - Longer than we anticipated
3. Plan Changes
  - Especially when working with bargaining units
  - Likely not to get all of the planned reductions in staffing

# Lessons Learned

4. Effective Team in Place
5. Can't do enough planning ahead of time
  - Reliable and understandable data

# Contact Information

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