
FW: Evaluations

From : Dr. Joseph Savoie <prez@louisiana.edu>
Subject : FW: Evaluations
To : Shelly V. Constantin <shelly@louisiana.edu>
Reply To : Dr. Joseph Savoie <prez@louisiana.edu>

Wed, Jun 07, 2017 11:53 AM
📎 12 attachments

From: Jeannine Kahn [mailto:Jeannine.Kahn@LA.GOV]
Sent: Monday, June 5, 2017 10:29 AM
To: Jim Henderson <Jim.Henderson@la.gov>; Nick Bruno <bruno@ulm.edu>; Rick Gallot <prez@gram.edu>; Les Guice <guice@latech.edu>; Chris Maggio <maggioc@nsula.edu>; Daryl Burckel <dburckel@mcneese.edu>; Philip Williams <pwilliams@mcneese.edu>; prez@louisiana.edu; Bruce Murphy <bruce.murphy@nicholls.edu>; John Nicklow <jnicklow@uno.edu>; John Crain <jcrain@selu.edu>
Cc: Edwin Litolff <Edwin.Litolff@LA.GOV>
Subject: RE: Evaluations

Gentlemen:

Your customized self-assessment template has been emailed to you. Attached please find a handout that provides information relevant to the 'Fiscal Health' section of the self-assessment template. If you have any questions about this information please contact Edwin.

Regards,
Jeannine



Jeannine O. Kahn, Ph.D.
Provost & Vice President
for Academic Affairs
UNIVERSITY OF LOUISIANA SYSTEM
1201 N. Third Street, Suite 7-300
Baton Rouge, LA 70802
P 225-219-0274 F 225-342-6473
www.ulsystem.edu

From: Jim Henderson
Sent: Monday, June 05, 2017 8:54 AM
To: Nick Bruno <bruno@ulm.edu>; Rick Gallot <prez@gram.edu>; Les Guice <guice@latech.edu>; Chris Maggio <maggioc@nsula.edu>; Daryl Burckel <dburckel@mcneese.edu>; Philip Williams <pwilliams@mcneese.edu>; prez@louisiana.edu; Bruce Murphy <bruce.murphy@nicholls.edu>; John Nicklow <jnicklow@uno.edu>; John Crain <jcrain@selu.edu>
Cc: Jeannine Kahn <Jeannine.Kahn@LA.GOV>
Subject: Evaluations

As you are aware, Board policy requires that university presidents be individually evaluated on a regular basis. As part of the evaluation process I ask that you prepare a self-assessment for the 2016-17 academic year. Dr. Jeannine Kahn will provide a template. Your response is due **Friday, June 23, 2017**. Also to be considered in the evaluation process are responses to an evaluation form which will be circulated to campus personnel. Dr. Kahn will work with you to identify those campus personnel that should be included.

In addition to the customary evaluation process, each university president will enjoy a more in-depth review every three years, beginning with three of you this year. The in-depth review will incorporate a third element of gathering input from a full circle of sources to include representatives from the university's foundation, faculty senate, staff senate, student government, alumni association, and community. The cycle for the next three years is as follows:

Evaluation Period	Presidents
AY 2016-17	Bruno, Murphy, & Nicklow
AY 2017-18	Burkel, Gallot, & Savoie
AY 2018-19	Crain, Guice, & Maggio

The evaluation process is an opportunity for you to provide a self-assessment of performance across multiple strategic objectives. It is designed to review the quality of your administrative performance within the context of the institution's mission, vision, strategic goals, and in fulfillment of your presidential charge. The evaluation process is intended to reflect on the full scope of administrative duties expected of you, and to provide meaningful, substantive feedback from key constituents regarding your efforts and areas of strength as well as the areas that need improvement.

If you have any questions about the evaluation process, please do not hesitate to contact me.

Best,
Jim



Dr. Jim Henderson
System President
UNIVERSITIES OF LOUISIANA



Jeannine O. Kahn, Ph.D.
Provost & Vice President
for Academic Affairs
UNIVERSITY OF LOUISIANA SYSTEM
1201 N. Third Street, Suite 7-300
Baton Rouge, LA 70802
P 225-215-0274 F 225-342-0473
www.lusystem.edu

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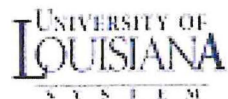


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Fiscal Health Analysis

Ratio Analysis Methodology

The Index computes three ratios from which four scores are generated. The original methodology for computing the ratios was modified to recognize the new reporting format required by GASB statements 34 and 35, which became effective in FY 2002. The data and methodology used to conduct the ratio analysis are as follows:

- Expendable net assets: The sum of unrestricted net assets and restricted expendable net assets.
- Plant debt: Total long-term debt (including the current portion thereof), including but not limited to bonds payable, notes payable, and capital lease obligations.
- Total Revenues: Total operating revenues, plus total non-operating revenues, plus capital appropriations, capital grants and gifts, and additions to permanent endowments.
- Total operating expenses: Total operating expenses, plus interest on long-term debt.
- Total non-operating expenses: All expenses reported as non-operating with the exception of interest expenses.
- Change in total net assets: Total revenues (operating and non-operating), less total expenses (operating and non-operating).

The methodology for calculating the three ratios is as follows:

- Viability ratio: Expendable net assets divided by plant debt. (Note: if plant debt is zero, then the viability ratio is not calculated and a viability score of 5 is automatically assigned.)
- Primary reserve ratio: Expendable net assets divided by total operating expenses.
- Net Income Ratio: Change in total net assets divided by total revenues.

Assignment of Scores

Based on the calculations described above, each ratio is assigned a score ranging from zero to five according to the criteria listed in the table below. A score of 5 indicates the highest degree of fiscal strength in each category.

Ratio Scores						
	0	1	2	3	4	5
Viability Ratio	< 0	0 to .29	.30 to .59	.6 to .99	1.0 to 2.5	> 2.5 or N/A
Primary Reserve Ratio	< -.1	-.1 to .049	.05 to .099	.10 to .249	.25 to .49	.5 or greater
Net Income Ratio	< -.05	-.05 to 0	0 to .009	.01 to .029	.03 to .049	.05 or greater

Based on these scores, a summary score termed the composite score is determined, which is the primary indicator of fiscal health. The composite score equals the sum of the assigned viability score multiplied by 30%, the assigned primary reserve score multiplied by 50%, and the assigned net income score multiplied by 20%.

NOTE: A composite score of or below 1.75 for two consecutive years would result in an institution being placed on fiscal watch. The highest composite score possible is 5.00.