



# **WELCOME TO THE 2019 AAIR SIG: Load Management & Planning**

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Macquarie University



# Agenda

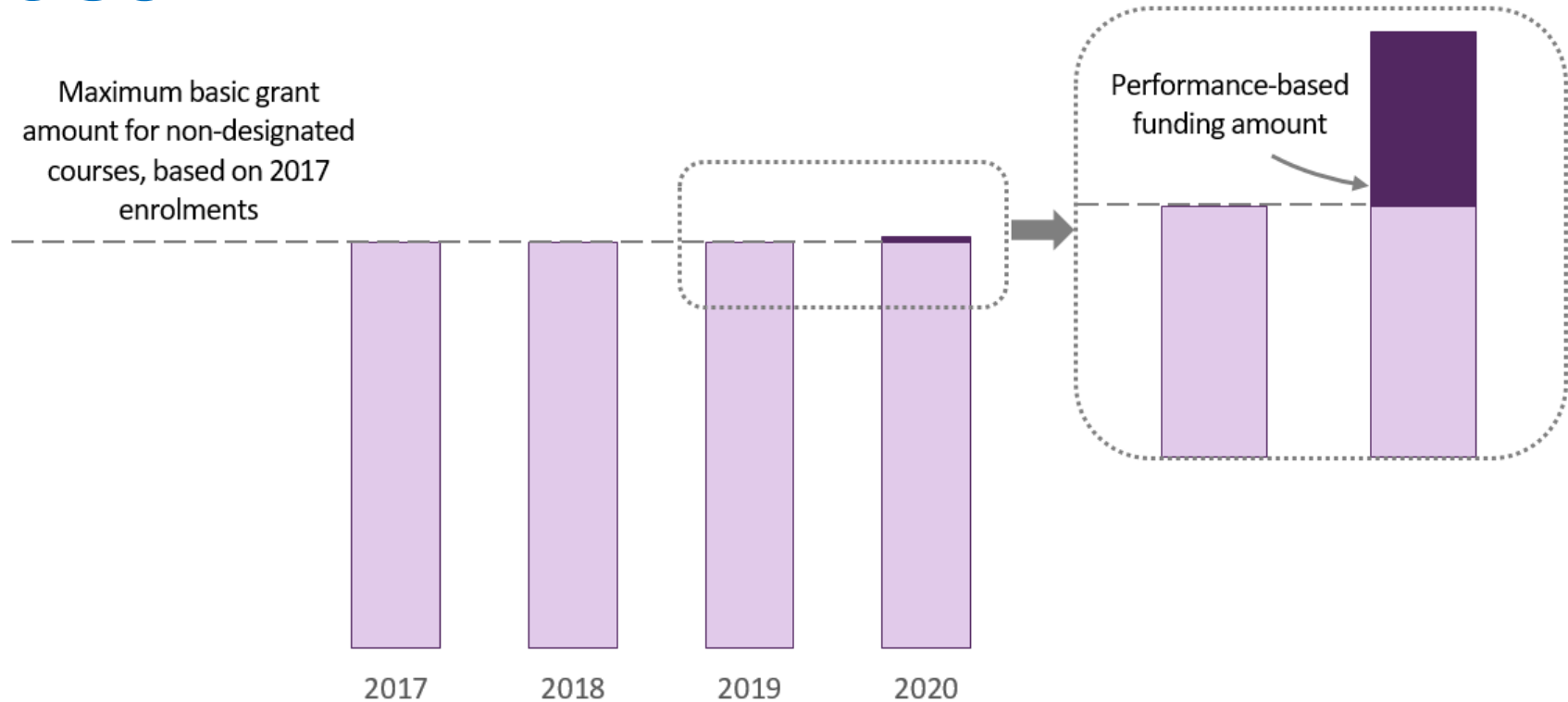
- Welcome
- General Update
- New LinkedIn profile and discussion
- Update from the Department of Education
- Presentation from Grattan Institute
- Load Management & Planning presentation



# Performance-based funding for the CGS

- At MYEFO 2017-18 it was announced that from 2020, funding for bachelor-level places will grow in line with population growth in the 18-64 year old age bracket, contingent on universities meeting specified performance requirements.
- ABS currently projects population growth for 18 to 64 year olds to be 1.36 per cent in 2020, falling to 1.25 per cent in 2022.
- Performance funding is estimated to be worth about \$80 million in 2020.

# Performance-based funding for the CGS





# Performance-based funding expert panel

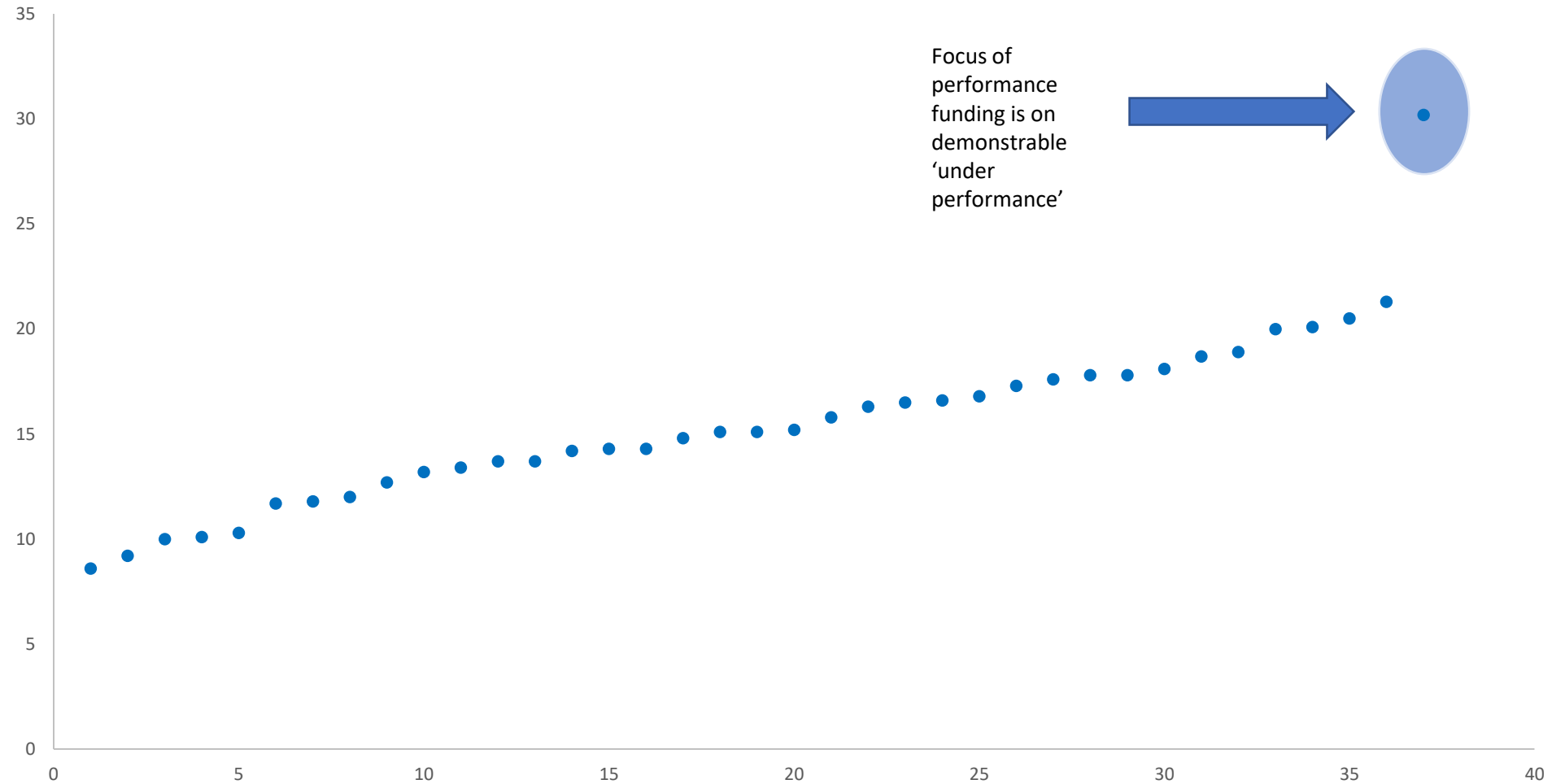
- Panel appointed in late 2018:
  - Prof Paul Wellings CBE (Chair), VC, UoW
  - Ms Barbara Bennett PSM, Former Dep Sec, DSS (resigned in April to take up position on Disability Royal Commission)
  - Prof Rufus Black, VCn and President, UTas
  - Prof Greg Craven AO, GCSG, VC and President, ACU
  - Prof Dawn Freshwater, VC, UWA
  - Prof Sandra Harding, VC and President, JCU
- Provided an interim report at the end of March
- Final report due 30 June.



# Terms of reference

- The appropriate performance measures to be used for assessing performance and their weighting
- How to address the disparity in attainment rates across Australia
- How to create incentives that genuinely encourage improved performance, so that performance-based funding does not become a “tick-box” exercise or an unattainable goal
- How to account for the varied missions and strengths of different providers, including regional providers
- Evidence from international examples of performance-based funding
- Optional processes and timeframes for the ongoing setting and evaluation of individual university targets

## Attrition rate (OLS 'modified' attrition rate), 2014



# Case study: Converting a University Load Forecasting Model from Excel to Calumo

ANDREW BRADSHAW, MANAGER GOVERNMENT REPORTING

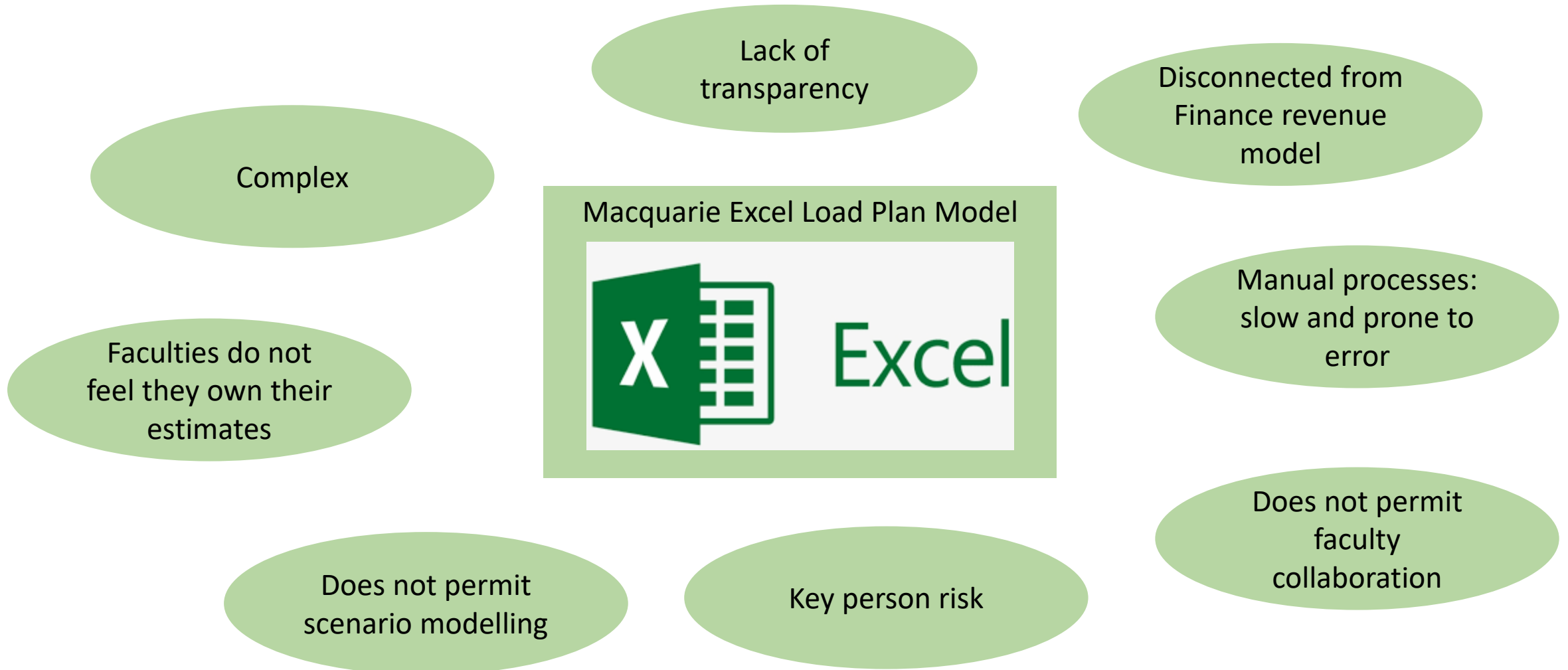




# Business drivers for moving the model out of Excel

The business context necessitated a more agile approach to load and revenue planning. Specifically:

- Total curriculum transformation – big bang approach in 2020, loss of history
- Annual budget process brought forward by 2 months: 2020-2024 budget model due by July 5<sup>th</sup>



# Why Calumo?

An informal survey of load planners revealed most were using either Excel or TM1, so why did MQU choose Calumo?

## Pragmatic Reasons:

- ✓ Finance were already using it
- ✓ Enterprise license available
- ✓ Limited time for implementation so no time for going to market



## Features that we liked:

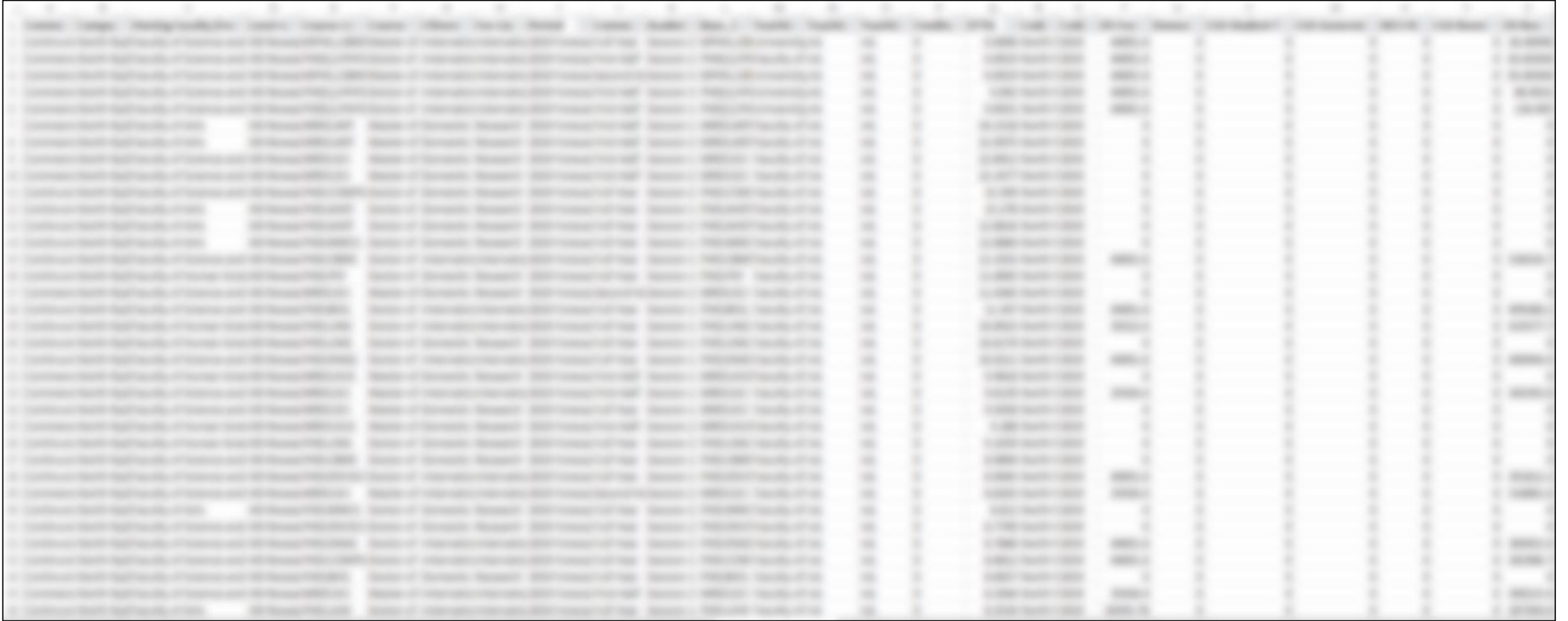
- ✓ Data written to a data base – no proprietary formats (unlike TM1)
- ✓ Allows data collection templates to be created, e.g. for collecting budget numbers and reference data management
- ✓ Advanced forecasting and modelling capabilities
- ✓ Advanced reporting capabilities

# The journey of implementation – key statistics

Objective: to create a tool which automates the steps taken to go from commencing head count forward estimates (5 years) to Net Revenue, including design for the new curriculum

- ✓ Proposal approved by Exec Group March 2019
- ✓ Project kick-off – April 1<sup>st</sup>
- ✓ Load model build and test completed 28 June, including changes for new curriculum
- ✓ Gross and Net Revenue model components completed 5 July
- ✓ One Calumo consultant
- ✓ Internal team:
  - Load planner
  - Data analyst
  - P/T project manager (provided by Finance)
- ✓ Cost - \$50K

From this



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