

WESTERN WASHINGTON UNIVERSITY
FY 2021-2023 Budget Strategy Analysis Committee
November 13, 2020

To supplement our normal budgeting processes by allowing for deeper and more inclusive consideration of items that can be streamlined or where savings can be realized across divisions, the FY 2021-2023 planning process will include an ad-hoc committee appointed by the Vice President for Business and Financial Affairs. This committee will provide perspective and thinking related to FY 2021-2023 budget planning, focusing on analysis of submitted strategies (noting impacts, financial estimate, pros/cons, alignment with principles), to inform deliberations of the Vice Presidents and Deans group and the University Planning and Resources Council (UPRC).

FY 2021-2023 Committee Charge

This committee is charged to review submitted strategies and prepare an analysis covering each strategy, including:

- impacts on the strategic plan and specifically on diversity, equity, and inclusion, following current best practices,
- alignment with the budget planning principles,
- potential net revenue or expense reduction to be generated,

as well as pros and cons of implementation. The focus of the committee should be on preparing information for consideration, rather than recommendations.

Budget and Financial Planning will staff the committee, provide a report template to format and structure the analysis, and assist with the assessment of financial impacts.

The committee will provide updates to the UPRC as requested throughout the process, including an initial update on committee membership and the strategies being evaluated.

The final report of the committee will be due March 15, 2021 to the Business and Financial Affairs Vice President's Office, with copies to the UPRC and the Vice Presidents and Deans group for their consideration in forming the FY 2021-2023 biennial budget recommendation.

FY 2021-2023 Committee Membership

Members will be appointed by the Vice President for Business and Financial Affairs, to reflect important perspectives/good thinkers from major areas, with attention to diversity of membership and the ability of members to apply a diversity, equity, and inclusion lens to their analysis. Membership will include:

- Dean (1-2)
- Department Chair/Director

- Chair of UPRC and/or designees (3) – should include both faculty and staff
- Associated Students designees (2)
- Structural Equity and Bias Response Team designee(s) (1-2)
- Enrollment and Student Services leadership appointee
- Business and Financial Affairs leadership appointees (2)
- University Advancement leadership appointee
- University Relations and Marketing leadership appointee
- Co-chairs/Facilitators: Faye Gallant (Executive Director, Budget and Financial Planning) and Brian Burton (Associate Vice President for Academic Affairs)

FY 2021-2023 Process

Note: Process begins in fall quarter 2020 and concludes in June 2021 with Board of Trustees approval of the FY 2022-2023 budget plan.

1. Updated multi-year scenario sheet provides parameters for level of response needed before/after mitigation strategies, as in FY21.
2. Broad solicitation of budget reduction and new revenue generation strategies through Budget and Financial Planning.
 - a. Suggestion box form, university-wide
 - b. Shared governance
 - c. Deans and Directors
3. Narrowing of pool to manageable number of viable strategies based on initial review. Budget and Financial Planning will screen submissions for those that are at the appropriate level and are credible. Vice Presidents and Deans as a group will consider which move forward for further review and analysis, similar to standard budget proposals (with encouragement to be realistic about both the scale of reductions that may be necessary and their willingness to potentially recommend those items at the end of the process). At this stage and throughout the process it should be clear that any gap not addressed through these strategies would need to be met via a divisional budget reduction.
4. Committee/subcommittees approach for detailed evaluation of those strategies.
 - a. Committee membership roster and list of strategies provided to UPRC.
 - b. Budget and Financial Planning staffs the committee/subcommittees and assists with financial impact analysis, report structure, etc.
 - c. Depending on number of options under consideration, subcommittees could be split to focus on groups of related strategies such as: Revenue Generation; Shared Services; Program/Service Elimination, etc.
 - d. The committee will determine the approach for measuring/estimating impacts on the strategic plan and specifically diversity, equity, and inclusion, following best practices.
 - e. Throughout the process, the committee will provide updates to the UPRC as requested.
 - f. The report will be shared with the UPRC and the Vice Presidents and Deans group.

5. The UPRC will review and provide feedback on strategies and strategic investments (see point 6).
6. Strategic Investments: Building a dedicated dollar amount for reinvestment into the scenarios/target sheet will ensure Western continues to pursue key opportunities and priorities. Review of investments in this approach would reside with UPRC, as it does for emergent budget requests. The process for bringing ideas forward would follow the emergent approach. Given the context of any investments, where such investment will likely require additional cutting elsewhere in the university, it will be especially important to include tracking and reporting/analysis of the performance of investments.
7. Informed by the committee evaluations and the UPRC, Vice Presidents and Deans, prepare a budget recommendation for review and comment by the university community. After edits, final budget recommendation will be presented to the President and Board of Trustees.