Strategic Budgeting Forum

December 1, 2021
Welcome and Introductions
What is Strategic Budgeting?

• In the absence of a plan-  
  the budget is the plan

• If a plan exists and it is not closely  
  linked to the budget-  
  the budget is still the plan

• Therefore, if a plan is to be implemented,  
  there must be a strong linkage  
  between the plan and the budget
Linking Planning and Budgeting

Strategic decisions focus on creation and maintenance of institutional assets.

Operational decisions focus on using our assets to accomplish specified purposes.
Why Strategic Budgeting?

- To align our budget with our strategic priorities
- To improve student learning and success
- To strategically invest in our institutional assets
- To ensure we are using resources efficiently and effectively
- To implement evidence-based budgeting linked to assessment
Guiding Principles and Assumptions

Below the surface challenges

Transformation vs Addition

Data informed decision-making

Transparency vs Advocacy

Assessment & planning engrained in campus culture—part of everyday work

Simple, clear communications

Priorities focused by the Strategic Plan

Progress measured against the Strategic Plan
Strategic Budgeting

A strategic budget is not just a budget; it is the strategic plan in action.
Key Process Improvements

- Streamline current decision package process
- Prioritize proposals using clear criteria
- Provide priorities to UPRC and other campus constituents for discussion
Current Process

- Biennium Decision Package
- Emergent Request Process
- Supplemental Budget Request Process
New Process

Priority Areas  Annual Call for Proposals  Prioritize and Discuss
Priority Areas

Inclusive Student Success
Graduate Programs

Infrastructure, Safety, & Regulatory Compliance
Prior requests partially funded

Other

Structural and Legacy Funding Needs

Priority Program and Service Areas

PROPOSALS
Priority Program and Service Areas

**Priority Areas**

**Graduate Programs**

**PROPOSALS**

Includes proposals that would enhance the university’s offerings in the post-baccalaureate certificate, master’s, and professional doctoral programs, including both in-person and on-line programs at any of WWU’s locations. Including but not limited to:

- program recruitment
- program development
- program expansion
- graduate student support
- graduate assistant expansion
- related infrastructure improvements
Priority Areas

Inclusive Student Success

PROPOSALS

This area includes proposals which support co-curricular and joint projects to enhance student:

- Access
- Retention
- Co-curricular and Academic Engagement
- Well-being across all domains

With particular emphasis on projects which will increase success for historically under-supported and -resourced students.
Priority Areas

**USE SPARINGLY**

- Infrastructure, Safety, & Regulatory Compliance
  - Accessibility
  - Unfunded Mandates
  - Safety Concerns
  - Deferred Maintenance
  - Information Technology Infrastructure
- Prior Requests
  - Will be identified by Budget office
- Other
  - Recognize there may be a (very) few proposals that don’t fit in other buckets

Structural and Legacy Funding Needs

- Infrastructure, Safety, & Regulatory Compliance
- Prior requests partially funded
- Other

BUDGET & FINANCIAL PLANNING | BUSINESS & FINANCIAL AFFAIRS
Evaluation Criteria

- Impact to ADEI
- Collaboration & engagement
- Link between resource requested & outcomes
- Sustainability

Western’s Strategic Themes
SETTING GOALS IS THE FIRST STEP IN TURNING THE INVISIBLE INTO THE VISIBLE.

Tony Robbins, US author
Key Dates

- **February 4**: Proposals due to Divisional Vice Presidents
- **February 14**: Proposals due from VPs to Budget and Financial Planning
- **February 18**: Proposals posted to web forum for university review and comments
- **April 6**: Initial prioritization and planning shared with UPRC and university community
- **May 2**: Draft budget recommendation and outline of FY23-25 request posted for university comment
- **May 23**: VPs finalize FY23 budget recommendation for Board of Trustees (Meeting June 10)
Questions?

Materials and Information

• Visit https://bfp.wwu.edu/wwu-budget for more information and to view and comment on proposals and recommendations in spring

• Email bfp@wwu.edu with further questions