

FY2023 Annual Review Process Overview

Fall 2021

UNIVERSITY of WASHINGTON



Annual Operating Budget Cycle

Plan

- Template Development
- Inform Community

Develop

- Process Improvement
- Final Operating Budget Presentation to Regents

Analyze

- Development of Operating Budget
- Unit Meetings w/Executive Office
- OPB 2nd Pass Review
- Unit Calls w/OPB

Other Activities

- Campus Unit Template Population
- OPB 1st Pass Review
- OPB Peer Review
- March

Timeline

- April - June
- July - November
- December - March

Impact

5 years impact model
large plan still
growth
relax
new
health

july - November

Template Development

Inform
Community

Process Improvement

April - June

Final Operating Budget Presentation to Regents

Development of Operating Budget

Unit Meetings
w/Executive
Office

OPB 2nd Pass Review

Unit Calls w/OPB

Plan

Develop

Analyze

Campus Unit
Template
Population

OPB 1st Pass Review

OPB Peer Review

December - March



FY2023 Annual Review Cycle Updates

What Is Changing

- Later release of materials: Dec 3, 2021
- GOF provisos parsed out from regular GOF in Fiscal Vitality workbooks
- Fewer narrative questions overall

What Is Staying The Same

- Due date: February 1, 2022
- Fiscal vitality projection timeframe: Mid-biennium process, projecting FY22-25
 - FY22 annual review cycle covered FY21-25
- Templates, aside from the separation of GOF provisos from regular GOF and the mid-biennium cycle projection timeframe
- Submission process: Upload to an online form



Planning for FY23

“What Do I Need To Know or Pay Closer Attention To?”

- > Select “Base Case” Planning Parameters & Assumptions
 - Compensation & FTE
 - > Pro Staff/Faculty Merit - 3%
 - > Classified/Bargained - Review labor agreements most relevant to local workforce, possible significant variability
 - > FTE – Assume flat overall, local conditions vary
 - Enrollment:
 - > Undergrad
 - Seattle & Bothell: flat overall, program to program variability
 - Tacoma: 5% decrease overall, program to program variability
 - > Grad
 - Flat overall, use local conditions to drive planning
- > Focus Items / Areas of Interest
 - Tuition Rate Proposals
 - > Baseline growth with inflation preferable to periods of no change followed by large increases, though local conditions may vary (market position, demand, etc.)
 - > Additional required narrative question if recommending no change to one or more rates
 - Addressing carryover growth and outlining strategic uses



Key New or Modified Questions

- > COVID-19 impacts on campus/unit strategic plan, budget processes or programmatic offerings
 - Previously focused on “updates” to strategic plan/process vs “impacts”
- > Course/program demand planning & capacity alignment
 - Expanded to encompass strategy/alignment between demand & capacity
- > Campus/unit discussion of ongoing work to support the UW's Diversity Blueprint
 - New



Annual Review Narrative Response Collection Methodology Crosswalk

Collected via Word Template*		Collected Online**
Programmatic & Academic Vitality Narratives		Staff FTE Growth or Contraction <i>(yes/no)</i>
Fiscal Vitality Narratives		Net Faculty FTE Growth or Contraction, by Fiscal Year <i>(numeric)</i> ★
Tuition Rate Recommendation Narratives	★	Brief comment on Faculty Net Growth or Contraction, by Fiscal Year <i>(short text)</i> ★
Faculty recruitment/retention challenges	★	Grad. Student FTE Growth or Contraction, by tuition group & fiscal year <i>(numeric)</i> ★
Confirmation of Communication with Stakeholders	★	New Tuition Category Requests <i>(short text)</i> ★
		Existing Tuition Category Rate Change Recommendations <i>(checkbox)</i> ★
		Modifications to Central Planning Assumptions <i>(checkbox & short text)</i>

* Completed in Word template & uploaded to online submission portal

** Completed as part of your annual review online submission

★ Required for campuses & academic units, or, where applicable, administrative units with faculty



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Questions?

