



UNIVERSITY of WASHINGTON

FY2025 Operating Budget Development Narrative Prompts

Complete Question List (Online/Offline) for Departmental Use – Do Not Submit This File

Consistent with previous budget development cycles, you will be asked to provide information that will support your unit's/campus's FY2025 Operating Budget Development review meeting with the Executive Office, which will be scheduled between April 1-12, 2024.

What to Submit	When to Submit (Deadline)	How to Submit	Required For
Tuition Rate Recommendations, Fee-based Program Recommendations, Tuition and Fee-based Rate Narratives and Consultation & Enrollment Forecasts	February 1, 2024	Upload to the Tuition Rate Recommendation and Enrollment Forecast Portal*	UWS Academic Units, UWB and UWT
FY25 Operating Budget Proposals	March 4, 2024	Complete in Workday Adaptive Planning	All Academy Units/Campuses
FY25 Operating Budget Narrative Responses		Upload to the Operating Budget Narrative Response Submission Portal*	All Academy Units/Campuses

* Available on OPB's [FY25 Operating Budget Development materials website](#)

Between March 4th and the date of your budget review meeting with the Executive Office, the Office of Planning and Budgeting (OPB) may reach out with follow-up questions.



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TUITION AND FEE-BASED RATE RECOMMENDATION NARRATIVE PROMPTS DUE 2/1/2024

Tuition-based Program Rate Recommendations - Narrative Section

*Text submitted within this section **will** be published to OPB's Annual Budget Development website*

-- If applicable to your unit --

Responses to the questions below are required for each tuition category that your unit/campus recommends adjusting (as submitted to OPB by 2/1/24). **Please note question #4 is required for any programs for which no tuition increase is requested.** If you are recommending changes for multiple tuition categories, please differentiate your responses within each question.

- 1) Please explain how the proposed rate increase will enhance student experience and promote student success?
Word Limit: 500
- 2) Tuition and fee increases have a disproportionate impact on low-income students. Please comment on how each fee change will affect student debt loads, and specifically how the program will offset this impact. *Word Limit: 550*
- 3) Please discuss your unit/campus's overall tuition strategy for the next 3-5 years. Describe if you expect the proposed change to result in changes to enrollment (including changes to resident/nonresident composition) or the volume of tuition waivers awarded. *Word Limit: 250*
- 4) If you are not planning to increase tuition for any program, please respond to the following: Generally, small, inflationary increases (1-2% annually) are preferred over no increase or large increases every few years. Please answer the following questions for each program where no increase is requested. *Word Limit: 250*
 - a) Please explain why this program's rate does not warrant an increase by describing the program's financial position, structure, peer comparisons, or other relevant information.
 - b) What do you currently anticipate annual rate change requests will be for the next two years?
- 5) Enrolled students affected by rate increases must be consulted on proposed increases before proposals are finalized. Please describe when and how students were consulted and summarize the feedback they provided regarding EACH of your tuition rate recommendations. *Word Limit: 500*



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Fee-Based Program Rate Recommendations - Narrative Section

*This section and accompanying Excel file for fee-based rate recommendations are replacing the previous process for annual fee-based program rate approval. Please reach out to Jed Bradley (jedbrad@uw.edu) with any questions. Text submitted within this section **will not** be published to OPB's Annual Budget Development website. However, responses and rate requests will be reviewed by the Faculty Senate Committee on Planning & Budgeting (SCPB) and approved by the Provost.*

-- If applicable to your unit. If not applicable, simply leave this section blank --

Responses to the questions below are required for **each** fee-based program that your unit/campus recommends adjusting. If you are recommending changes for multiple fee-based programs, please differentiate your responses by requests "Under 5%" and "5% and Above." **Please note question #4 is required for any programs for which no fee increase is requested.**

- 1) Please explain how the proposed rate increase will enhance student experience and promote student success?
Word Limit: 500
- 2) Fee increases have a disproportionate impact on low-income students. Please comment on how each fee change will affect student debt loads, and specifically how the program will offset this impact. *Word Limit: 550*
- 3) Please discuss your unit/campus's overall fee-based rate strategy for the next 3-5 years. Describe if you expect the proposed change to result in changes to enrollment (including changes to resident/nonresident composition). *Word Limit: 250*
- 4) If you are not planning to increase fee-based rates for any program, please respond to the following: Generally, small, inflationary increases (1-2% annually) are preferred over no increase or large increases every few years. Please answer the following questions for each program where no increase is requested. *Word Limit: 250*
 - a) Please explain why this program's rate does not warrant an increase by describing the program's financial position, structure, peer comparisons, or other relevant information.
 - b) What do you currently anticipate annual rate change requests will be for the next two years?
- 5) Enrolled students affected by rate increases must be consulted on proposed increases before proposals are finalized. Please describe when and how students were consulted and summarize the feedback they provided regarding EACH of your fee-based program rate recommendations. *Word Limit: 500*



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OPERATING BUDGET PROPOSAL NARRATIVE PROMPTS DUE 3/4/2024

Programmatic & Academic Vitality Narrative

*Text submitted within this section **will** be published to OPB's Annual Budget Development website*

Where possible, you are encouraged to leverage published materials already created

- 1) Please provide a web link to your campus/unit strategic framework and provide three to five bullet points outlining the relationship between your resource plan and your strategic framework. *Word Limit: 750*
- 2) Please discuss your campus/unit's planned utilization of resources, as identified in your Adaptive entries (institutional initiative = UW Diversity Blueprint), in support of the [2022-2026 UW Diversity Blueprint](#) themes and goals. *Word Limit: 750*

Operating Budget & Fiscal Health Narrative

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- 1) How has the overall financial health of your unit/campus changed in the last year? *Word Limit: 500*
- 2) Please describe the material changes to your unit or campus net position since FY2024 plans were submitted to the Office of the Provost. *Word Limit: 500*
- 3) Are you forecasting an increase or decrease to net position within core academic operating funds (GOF & DOF) by more than 30% by the end of FY2024 or FY2025 (as measured against carryover available at the end of FY2023)? If so, please summarize the primary drivers of the change. *Word Limit: 500*
- 4) Please summarize your net position strategy, including major investments (net use) or contributions (net gains) as well as how the strategy aligns with the institutions' values, and your unit's strategic plans. *Word Limit: 500*

Faculty and Staff Position Budget Plan Narrative; Faculty Hiring Plan Alignment

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- 1) Please consider the **Staff** position budget plans you have entered in Adaptive Planning and provide a summary as to how your position plans support and enhance the student experience, reduce risk, and alleviate administrative burden. *Word Limit: 500*
- 2) Consider the **Faculty** position budget plans you have entered in Adaptive Planning and review the following resources:
 - Your campus/unit student credit hours divided by tenured/tenure-track and teaching track faculty.
 - Your campus/unit student FTE divided by tenured/tenure-track FTE

Note: both resources are available on the [FY25 Budget Development Materials webpage](#), under support item #8 "Multidimensional Planning Tools & Resources".

2a) Please confirm that the Faculty position budget plans you have entered in Adaptive Planning is in alignment with the campus/unit hiring plan for 2024-25 that you are preparing and reflective of student demand. *Indicate "confirmed" or provide a brief rationale for deviation, if not explained in question 2b, below.*

2b) If your Faculty position budget plans and forthcoming campus/unit hiring plans for 2024-25 are reflective of hiring needs that may not directly relate to student demand, please comment on these needs (primary drivers, strategies, opportunities, etc.). *Word Limit: 500*



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Required Budget Development Consultative Process Summary – Faculty, Staff and Students

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-- If specific questions are not applicable to your unit, simply indicate n/a --

Consultation with your elected faculty councils, student councils and unit/campus staff, regarding your unit's/campus's budget proposal materials, including your proposed FY25 operating budget, narrative responses, tuition rate recommendations and fee-based rate recommendations are an important and necessary component of the UW's budget development process. Your responses to the questions below will be documented and included as part of the FY25 operating budget development review materials provided to Executive Leadership of the UW.

PLAN NOW to ensure that all unit/campus review and consultative processes are completed by the March 4, 2024 due date.

- 1) Please indicate the date that FACULTY leadership within your unit/campus was consulted and provided the opportunity to provide input as part of this budget planning exercise
- 2) Please list a point of contact for your FACULTY leadership (name and UW email address).
- 3) Please indicate the date that STUDENT leadership within your unit/campus was consulted and provided the opportunity to provide input as part of this budget planning exercise.
- 4) Please list a point of contact for your STUDENT leadership (name and UW email address).
- 5) Please discuss how you involved campus or unit staff in the consultative process.
- 6) Since submission of your tuition and/or fee-based rate recommendations on February 1, 2024, has your campus or unit received any additional feedback from students? If so, please summarize here.