



UNIVERSITY of WASHINGTON

FY2022 Annual Review Narrative Survey

Unit: Office of Planning & Budgeting

Section 1: Programmatic & Academic Vitality Narratives

- 1) Have you made any changes to your unit's strategic plan and/or budget process in the past year? If yes, what are 3-5 key elements of your unit's new/revised strategic plan and/or budget process? If no, please comment on the progress you've made in 3-5 key areas of your strategic plan.

The OPB strategic plan integrates new elements, and continues previous priorities. Both are detailed below:

New initiatives:

- **Improve intentional engagement with Diversity Blueprint goals, and view our work through a diversity, equity and inclusion lens.**
 - Modified our mission, vision, values and principles
 - Completed a curriculum provided by Professor Eric Davis
 - Established individual, measurable goals for all staff, responsive to the Diversity Blueprint
 - Continuing to identify opportunities to align Diversity Blueprint and DEI goals into templates for funding requests and fee increases and ensure that alignment is centered in decision-making.

Continuing & Streamlined Initiatives:

- **Engage and plan for Finance Transformation**
 - Continue to participate in various levels of program governance
 - Lead Plan and Manage the Business end to end process design. Begin to shift budget development (before go-live) to align with anticipated changes
 - All teams review, evaluate and provide feedback to OPB FT conduits to ensure basic business needs will be met and efficiency improved post go-live.
 - Ensure alignment and integration with the state's finance transformation (OneWa).
- **Enhance FY22 Budget Development cycle by integrating new components**
 - Distribute peer benchmarking dashboards and analyses to deans and department chairs
 - Build out multi-year instructional cost benchmarking using Delaware Cost Study submission dataset
 - Integrate instructional cost benchmarking into unit level long-term planning questions and discussions with deans
 - Build on the Phase I implementation of the Admissions Selection database and tool by fully integrating yield models to inform cohort building and differential admissions for FY22
 - Scope and plan for long-term strategic admissions to completion pipeline using components of the Admissions Selection tool and process by integrating demand, capacity, retention, and outcomes data with new admissions yield models
 - Continue to improve modeling efforts around tuition, enrollment and financial aid strategy (IDA) and integrate into FY22 budget development work by roll out of process to campus in November and delivery of information to President and Provost in February for decisions to be made by May
- **Further improve ABB**
 - Carry out the processes necessary to ensure a comprehensive catalog of institutional tax or recharge structures is completed by December 2020
 - Deliver ABB Tuition and ICR dashboards to campus users
 - Revamp ABB webpages, providing "ABB Profiles" and "Personas" for more guided support and navigation of the tuition model
 - Identify appropriate scope for Taxation review and potential overhaul by the end of Fall 2020
 - Facilitate an inventorying of taxation to be considered as part of the Taxation review
 - Lead efforts to examine campus-wide taxation models and make recommendations to improve business process
- **Collaborate in data and policy governance improvements**
 - OPB to serve on data governance committees



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- Improve fee processes and compliance to benefit students:
 - Continue to find ways to improve E.O. 44 and align student fee processes.
 - Work to ensure compliance with E.O. 44 and waiver/exemption policies (course fees, Tuition Exemption Program, UPASS).
 - Implement student fee revenue template (IDA and PPSO) and ensure SAF guidelines are in compliance.