



UNIVERSITY of WASHINGTON

FY2025 Operating Budget Development Narrative Prompts

UW Finance

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*

Finance, Planning & Budgeting (FPB) emerged in January 2024 through the integration of the Office of Planning & Budgeting and central Finance. In February 2024, the new group completed a leadership retreat and established:

- Shared understanding of our vision for high performance.
- Shared understanding of desired culture as a group.
- Alignment surrounding goals and values to inform mission statement and purpose.
- Insights on ways to better support the Academy and each other.
- Preliminary work planning in key areas.

A new strategic roadmap is in the works, with a long-term focus to leverage FPB's integration for efficient processes, standardized policies, and seamless customer experience. In the next 6-12 months, FPB will focus on stabilizing systems impacted by FT changes by:

- Stabilize core accounting.
- Stabilize sponsored programs finance Workday impacts and SAGE integration pain points.
- Stabilize procurement and accounts payable.
- Land legislative session, support our institutional analysis, state operations, and budget strategy teams as they pull together the first enterprise-wide budget in Adaptive.
- Land internal controls in our new environment, produce an audit plan that represents our best effort to produce an accurate and timely audit.
- Foster conditions for developing a new shared culture and mission.
- Foster an org-wide DEIA committee and continue to center our work in equity and belonging.
- Develop and complete our Phase II integration.



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- 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*

Finance, Planning & Budgeting (FPB) actively contributes to advancing the UW Diversity Blueprint by focusing on staff development and training. A placeholder of \$20,000 has been allocated for Diversity, Equity, and Inclusion (DEI) training. Additionally, FPB is committed to the following strategic initiatives:

Cultivate an Accessible, Inclusive and Equitable Climate

- DEI training and opportunities to engage for all FPB staff.
- Creating a new FPB-wide DEI committee.
- Develop individual, measurable goals for all FPB staff, responsive to Diversity Blueprint 2.0 goals.

Attract, Retain, and Graduate a Diverse and Excellent Student Body

- Prior to go-live, SFS' Experience Survey was positive (FY20: 60% FY21: 68% FY22: 72.7 FY23: 70%), Orientations were provided for 17,212 students for FY2023, and 99% of emails answered under 6 hours.
- Lean coaching support to UW Bothell Disability Services Office (to reduce time from notice of a need to accommodation made) and with UW Bothell Diversity & Inclusion Office (to reduce time from student reporting to meeting with dept for resolution and to provide additional data for the Diversity Office for identifying trends, etc.).

Attract and Retain Diverse Academic Personnel

- University Housing Assistance Program provided and stewarded at Provost's direction.

Attract and Retain Diverse Staff

- Mentoring program in development.
- Working to integrate OPB's DEIA committee with Finance, and provide monthly updates from the committee, in addition to localized teams-based resources, articles, and opportunities to connect.
- New language in position descriptions and job postings encouraging all to apply, even those without the skills noted, and encouraging those without "documented or traditional skillset" to develop those skills with FPB.
- Modified educational requirements for position postings as a best practice for equity and diversity in hiring process.

Develop Place-Based Education and Engagement to Advance Access, Equity, and Inclusion

- Enhancing engagement with community members and process clarity to engage with community members across the University in setting internal and state capital and operating budget priorities.

Improve Accountability and Transparency at All Levels

- Organizational Health goals for every team aimed to develop a diverse, innovative team where every employee is respected and sees a path for growth and belonging.



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- Ongoing work to integrate equity analysis into funding request templates (internal budget requests, state agency requests, etc.), policy analysis (internal policy development, bill analysis, etc.) and decision making in collaboration with University community members.
- Integrated prompts regarding DEI unit-level plans and FDM values into FY24+ annual budget development process.

Do Not Submit This File



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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 --

(not applicable)

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.