Today’s Meeting

- **Preview of content**
  - Foundation for budget decisions
  - Opportunities and challenges
  - Updates on actions to address the budget
    - Success depends on involvement from all

- **Next steps and closing comments**

- **Q & A – Open discussion**
  - budget-questions@uwm.edu
Foundation for Budget Decisions

- Priorities provide framework for decisions
  - **R-1 designation**: commitment to retain
  - **Student success**: enroll, retain, and graduate
  - Carnegie Classification in **community engagement**
## Opportunities and Challenges

- **R1 Standing**
- **Sustainability**
  - Student success
  - Accreditation
  - Budget challenges
    - Ongoing cuts
    - Tuition freezes
    - Schools/Colleges created without fiscal support
  - Competitive marketplace in higher education
  - Compensation increases for faculty and staff
Tactics to Address Opportunities and Challenges

- How to address R1 Standing and Sustainability?
  - Cuts already taken
  - Reduce administration
  - Strategic position control
  - School/college alignment
  - Workload policy
  - Course alignment
  - Budget model planning
  - Accelerate integrated shared services
  - Space utilization policy and plan
Administrative position reductions

- Reduce senior campus administration (VC/AVC)
- Shrink limited appointees
- Student services administration consolidation
  - Senior Student Affairs Officer
  - Appoint current leader as CEMAT co-chair
Strategic Position Control

- Significant tool to address priorities and future
- Discussing and reviewing governance input
  - Process
  - Reviewing body
  - Priorities
School/College alignment

- Campus feedback and Chancellor charge
- Reviewing financial details and strategic options

Process and initial steps
- Involve deans and governance
- Timeline
- All decisions guided by R1 and student success
Workload policy

- **Existing policy: faculty document #2027**
  - https://www4.uwm.edu/secu/facdocs/2587.pdf

- **Purpose of policy**
  - Equity and fairness in work distribution
  - Support research

- **Implement policy consistently by fall 2016**
  - Requested data from deans
  - UC discussion
Course alignment

- Work with governance, including APBC, and S/C to develop process
- Phase in approach
Continue budget model planning

- UWM will look different
- Not optimal to implement now
  - Organization structure shifts
  - Continued budget cuts
- Chancellor decision: implement in spring 2017
  - First effective in 2019 budget
- Continued efforts
  - Build incentive for research/R1 into model
  - Respond to inquiries regarding subvention pool
  - Allow reaction to SPC, academic alignment, ISS
  - Continue to update and work with governance groups
Accelerate integrated shared services

- **Project underway for some time:**
  - http://uwm.edu/issp-integrated-support-services/

- **4 functional areas with work teams**
  - Budget
  - IT
  - Human Resources
  - Procurement

- **Assessment phase**
  - Focus groups underway
  - Survey of user groups: next week

- **Huron to assist ISS teams to achieve acceleration**
  - Assess “as is” information
  - Help with future state recommendations
  - Help teams with implementation plan
Space utilization policy and plan

- **Goal of policy/plan**
  - Incentivize space productivity
  - Enhance R1 status and research revenues, and contain/reduce costs

- **Initial stages of these efforts**

- **Requested that Space Planning Committee appoint a subcommittee**
Upholding Strategic Priorities

- Tactics to address opportunities and challenges will support strategic priorities

1. R1 Standing
2. Student Success
3. Community Engagement
Future

- We will re-position ourselves to be successful
- We will make progress by working together
  - Schools/Colleges/Divisions
  - Governance
  - Central administration
- Choices will poise UWM for the future
  - R1 standing sustained
  - Students enrolled, retained, and graduated
  - Continue to showcase research and students in community
  - Compensation increases
Next Steps

- **Today’s presentation posted:** uwm.edu/budget

- **Things underway and t/b immediately undertaken**
  - Administrative re-structuring
  - Integrated shared services
  - Development of strategic position control process
  - Planning & consultation with deans, governance groups and others:
    - Academic alignment
    - School/college alignment
    - Workload policy
    - Space utilization policy and plan

- **Next campus budget meeting:** May 10, 10-11 a.m., Location TBD
Questions & Answers
Open Discussion

budget-questions@uwm.edu
Any slides following spacer are on hold or for background only
**Budget Planning Task Force**

**Recommended Distribution of FY16 Base Cut:**

<table>
<thead>
<tr>
<th>Unit</th>
<th>Recommended Base Cut</th>
<th>* % of Available Budget</th>
<th>% of Cut</th>
</tr>
</thead>
<tbody>
<tr>
<td>General Education Administration</td>
<td>$576,903</td>
<td>3.1%</td>
<td>3.7%</td>
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<tr>
<td>Student Affairs</td>
<td>$4,000,000</td>
<td>19.5%</td>
<td>25.5%</td>
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<tr>
<td>Finance &amp; Administrative Affairs</td>
<td>$3,125,558</td>
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<td>Unit -wide (Campus)</td>
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<td>Administrative Units</td>
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<td>60.5%</td>
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<tr>
<td>Academic Affairs (including all Schools and Colleges)</td>
<td>$6,200,000</td>
<td>64.4%</td>
<td>39.5%</td>
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<tr>
<td><strong>Total Base Cut for FY 2017</strong></td>
<td><strong>$15,700,000</strong></td>
<td></td>
<td></td>
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<tr>
<td><strong>Carry Forward Funding from FY 2016</strong></td>
<td>- $12,217,100</td>
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<tr>
<td><strong>Amount Needed for FY 2017</strong></td>
<td><strong>$3,482,900</strong></td>
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</tbody>
</table>

*If the Auxiliary Budget were fully removed from “Available Budget,” Administrative Units hold 22% of the budget, and Academic Affairs holds 78%*
### Recommended Distribution of FY17 Base Cut:

<table>
<thead>
<tr>
<th></th>
<th>Recommended Base Cut</th>
<th>% of Available Budget</th>
<th>% of Cut</th>
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<tbody>
<tr>
<td>General Education Administration</td>
<td>$605,000</td>
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<td>Unit-wide (Campus)</td>
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<td>Administrative Units</td>
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<td>Academic Affairs (including all Schools and Colleges)</td>
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<td>64.4%</td>
<td>60.8%</td>
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Total Base Cut for FY 2017: $14,542,200

Carry Forward Funding from FY 2016: + $3,482,900

Amount Needed for FY 2017: $18,042,200

*If the Auxiliary Budget were fully removed from “Available Budget,” Administrative Units hold 22% of the budget, and Academic Affairs holds 78%