UWM Biennial Budget Planning Task Force
Overview & Charge
March 4, 2015

Executive Sponsor: Chancellor Mark Mone

Task Force Members: Provost and Vice Chancellor for Academic Affairs Johannes Britz (Co-Chair)
Vice Chancellor for Finance & Administrative Affairs Robin Van Harpen (Co-Chair)
Academic Planning and Budget Committee Chair Rebecca Klaper
University Committee Chair Mark Schwartz
Academic Staff Committee Chair Sarah Morgan
Classified Staff Advisory Council Chair Stan Yasaitis
Student Association President Ryan Sorenson
Vice Chancellor Michael Laliberte
Interim Associate Provost for Research Mark Harris
Dean Rodney Swain, L&S
Dean Sally Lundeen, College of Nursing

Ex-Officio Task Force Members: Vice Chancellor for University Relations & Communications Tom Luljak (liaison to the Budget Communications Task Force)
Associate Vice Chancellor for Business & Finance Jerry Tarrer (Co-Chair of Budget Planning Support Team)
Dean Tim Smunt, Lubar School of Business (Co-Chair of the Budget Planning Support Team)

Task Force Support Team: Associate Vice Chancellor for Business & Finance Jerry Tarrer (Co-Chair)
Dean Tim Smunt, Lubar School of Business (Co-Chair)
Dean Bob Greenstreet, School of Architecture and Urban Planning
Unit Business Representative Autumn Anfang, Student Affairs
Unit Business Representative Margie Anunson, SOE, CHS, HBSSW
Unit Business Representative Kathy Heath, FAA
Unit Business Representative Pat Kissinger, L&S
Unit Business Representative Paul Klajbor, CEAS
Desired Outcome:

Manage the 15-17 Budget Cut and achieve net positive operating income for UWM within a defined number of years, with sustainable growth thereafter, in support of the mission of UWM (“Survival to Thrive”).

Principles:

1. Protect our core mission and values: students, research, engagement, culture/climate, and brand/visibility/image.

2. Operate strategically and consider our essential strengths: most critical programs, services, departments, and centers—and the talent to move us ahead and forward in this time.

3. Look internally in ways that we have not considered before: consolidations, mergers, reductions in non-essential services, ways to serve students and other key audiences in more efficient ways, and new sources of revenue.

4. Consider items that must be or can be put on hold for now—triaging for the needed hands-on priorities.

5. Identify content and venues for communicating, sharing information and also identifying ways in which interested community members (internal and external to UWM) can promote our value and advocate on our behalf.

6. Recognize that the campus operations and critical education and research activities must go on. While the proposed budget cut is massive and will be difficult, the larger enterprise goes on and requires even better decision-making and clear leadership.

7. Move forward together, boldly, as a campus united around the same goals.

Charge of the Task Force:

The Task Force is charged with developing and prioritizing first short-term, then medium-term, and finally long-term strategies for accomplishing the desired outcome.
While the specific steps may evolve through Task Force discussions, loosely, the Task Force will work on the following schedule:

1. February 15 to May 1: Short-Term Strategies

   Develop a range of potential short-term strategies for “paying for” the budget cut in FY 16. Evaluate and prioritize strategies. Develop recommendations, to be presented by the Chairs of the Task Force to the Chancellor.

2. May 1 to July 1: Medium-Term Strategies

   Develop a range of potential medium-term strategies for achieving campus-wide or intra-unit savings, to allow allocation of all or part of the budget cut to units in FY 2017. Evaluate and prioritize strategies. Develop recommendations, to be presented by the Chairs of the Task Force to the Chancellor.

3. July 1, 2015 to July 1, 2016: Long-term Strategies

   Develop a range of potential long-term strategies for achieving campus-wide or intra-unit savings and increased revenues, over a five year period. Evaluate and prioritize strategies. Develop recommendations, to be presented by the Chairs of the Task Force to the Chancellor.

The Budget Planning Task Force will meet every other week until the frequency may be diminished. Meetings are for members only (no substitutes).

Role of the Support Team:

The Chairs of the Support Team will attend Task Force meetings. The Chairs will relay to the Support Team assignments from the Budget Planning Task Force to research potential strategies, including the process for adopting strategies, logistics, and the potential savings and other impact of those strategies. In addition, the Support Team may, on its own initiative, recommend strategies for consideration by the Task Force.

The Support Team will meet as often as necessary to accomplish the responsibilities of the team. The Support Team may invite other individuals as necessary to complete the assignments.