



WISCONSIN
UNIVERSITY OF WISCONSIN-MADISON

MEMORANDUM

Date: December 22, 2021

To: Division Directors

From: Karl Scholz, Provost and Vice Chancellor for Academic Affairs
Rob Cramer, interim Vice Chancellor for Finance and Administration

Re: 2022 Annual budget meetings

We are beginning to prepare for the annual divisional budget meetings with leadership which will take place during the months of February and March 2022. Once again, we are asking you to submit a narrative to help guide these discussions. Specifically, we would like you to address these broad areas in your write-up:

- **Mission**

- As you work through the prompts below, please *briefly* describe the organizational accomplishments and challenges (as they contribute to the overall mission of the university) in your unit over the past year.

- **Financial and Organizational**

- What are your plans for using your accumulated 101 balances? (if applicable) Are there operational risks that you are mitigating by having all or a portion of these balances?
- What are your plans for using any other accumulated 128 and 136 balances? (if applicable) Are there operational risks that you are mitigating by having all or a portion of these balances?
- What is driving FTE increases in your unit? (if applicable)
- Are there services which you provide to campus that are duplicated in schools and colleges or other campus units, resulting in higher costs and inefficiencies for the University as a whole?
- What pressures are on any segregated rates (or other rates) that your unit charges? What increases or decreases do you anticipate in the next several years?
- What ideas do you have in place or ready to launch to generate more revenue and/or reduce administrative spending? (if applicable)
- What do you consider the largest threats to successfully implementing these plans?

- **Employees**

- What are priorities for retaining employees in your organization?
- What, if any, challenges are you seeing in retention or recruitment of employees?
- What are training and development priorities in your organization?

If you wish to provide commentary on other key areas in your unit (e.g., public service) please feel free to include them in your narrative. We will consider proposals for one-time or base additions to your budget but as we emerge from the pandemic, funding is limited and largely being prioritized for our teaching and research mission, capital renewal projects, strategic compensation programs, and the growth of the online undergraduate degree program.

Finally, to further enhance our discussions, the Budget Office will soon be sending out a PowerPoint presentation to your unit containing information on key metrics including fungible balances, FTE trends, and recent spending activity. They will then be following up with your team to answer any questions on the data. We will begin each meeting by reviewing this presentation.

To give us ample time to review your narrative, please submit them to the Budget Office no later than one week before your meeting. Thank you for your cooperation in this important exercise and please reach out to David Murphy or Jennifer Klippel if you have questions on the process.