



Date: December 8, 2022

To: UW-Madison Deans

From: Karl Scholz, Provost and Vice Chancellor for Academic Affairs

Rob Cramer, Vice Chancellor for Finance and Administration

Re: FY24 School, College, and Divisional Budget Meetings

We are beginning to prepare for the FY24 budget meetings with leadership. These will take place during January, February and March 2023. To inform and guide decisions regarding budget allocations in FY24 and after, each school, college and division is being asked to provide a narrative in advance of unit meetings. For this year, we would like you to address these broad areas in your write-up (as applicable):

- Teaching and Learning (Undergraduate and Graduate)
 - Please comment on changes in credit hours and degree home in your school/college.
 - Do you have opportunities to launch or further develop large-scale 131 or VISP programs?
 - What are key opportunities and challenges on the academic side of your school/college?
 - What are the key metrics or qualitative information you monitor to assess the overall health of the school/college's teaching and learning efforts?
- Research
 - What strategies are you pursuing to increase external funding (federal and non-federal grants)?
 - What institutional investments, including capital needs, are critical in support of your strategy, recognizing that we remain in a resource-constrained environment?
 - What are key opportunities and challenges for your school/college within the research enterprise? What are the key metrics or qualitative information you monitor to assess the overall health of the school/college's research efforts?
- Financials
 - What are your plans for your accumulated balances (spendable gift funds at WFAA and at UW-Madison in funds 101, 128, 131, 136, and 150) in FY23 (current year), FY24, and FY25? By fund, what balance amount are you managing towards and what is the financial and program basis for that target?
 - Are there opportunities for shared services of other (substantial) efficiency-enhancing administrative changes in your unit?

- Employees
 - How did you approach the 2022-23 compensation exercise and what priorities informed allocations of available funds (both centrally provided and those you allocated)?
 - What are your priorities in FY24 and FY25 for additional compensation of faculty, staff, and others (such as graduate students, post-docs, etc.)?

As you know, FY24 and FY25 will be years of transition as we prepare for and go live (July 1, 2024) with new administrative tools for finance and HR through the system-wide Administrative Transformation Program. For schools and colleges, we are holding reserves to support evolving resource needs and investing in the Administrative Innovation and Planning (AIP) effort to identify and support appropriate operating models for UW-Madison.

If you wish to provide commentary on other key areas in your school or college (e.g., public service) please feel free to include them in your narratives. We will consider proposals for one-time or base additions to your budget but as we plan on limited enrollment growth over the next several years, funding is limited and largely being prioritized for strategic initiatives to further support the teaching and research mission of the university.

Finally, to further enhance our discussions, the Madison Budget Office will soon be sending out a PowerPoint presentation to your school or college containing information on key metrics including fungible balances, FTE trends, philanthropic activity, and teaching and research trends. They will then be following up with your team to answer any questions on the information. We will begin budget meetings with this presentation. To provide ample time to review your narratives, please submit them to the Madison Budget Office no later than one week prior to your meeting. Thank you for your assistance in the process. Please reach out to David Murphy or Andrew Johnson if you have any questions.