



---

## Opportunities to Engage in the Budget and Financial Planning Process

---

### **Budget Manager Program and Meetings**

Throughout the year all of the campus community has an opportunity to monitor our fiscal activities via our website <http://www.uww.edu/adminaffairs>, but for those that want a deeper engagement we recommend that you attend our monthly Budget Manager meetings. In order to strengthen our resources, we established the Budget Management Program and Meeting which includes monthly meetings that are open to all. Typically we have about 25 attendees, including, deans, assistant deans, budget managers and other roles. If you would like to receive invitations to be involved please e-mail [mil-lerh@uww.edu](mailto:mil-lerh@uww.edu)

### **Learn about Policy and Procedure**

The Fiscal Practice Directive details how UW-Whitewater will fulfill UW System Policy aligned with State and/or Federal regulations, and ensure the financial health and stability of our campus, as well as communicate an accurate fiscal condition. This Practice Directive intends to balance prudent fiscal management with adequate levels of resources to carry out the University's missions, programs, strategic goals, and objectives in an effective and efficient manner. Reviewing the Fiscal Practice Directive and Procedure is the best way to understand the budget and financial processes. <http://www.uww.edu/adminaffairs/compliance/practice-directives-and-procedures>

### **Think of a Great Idea and Submit for Funding**

In FY19 we developed a Funding Charter Program. Funding charters are a strategic way to funnel dollars to initiatives that benefit students and the campus as a whole. <http://www.uww.edu/adminaffairs/budget-information-forms>

### **Attend a Meeting or Ask for a Meeting**

There are a number of opportunities to learn more about Budget and Financial Planning:

Invite a finance/budget person to meetings – if you are planning to review new programs, new activities, etc. the eyes and ears of a finance/budget person may help not only avoid pitfalls later in the approval process, but help the idea not only serve staff and students but also be designed to improve the return on investment (ROI)

<https://www.uww.edu/university-committees/faculty-budget> if you have concerns or suggestions as a faculty member you can reach out the Faculty Budget Committee who is engaged with Administrative Affairs.

<https://www.uww.edu/adminaffairs/finance/accounting-services/campus-business-representatives-x78164> Attend a CBR meeting. Campus Business Representatives (CBRs) provide a liaison role with Financial Services to facilitate operation, training, and access to financial systems. They serve as a conduit for feedback from campus staff on financial reporting, policies and procedures. The CBRs coordinate the dissemination of information about policies to the department/college, and work with staff to understand them within the department/college operations. Campus staff can contact Financial Services or the department/college CBR with questions on financial issues. Below is a list of CBRs by department/college. For more information e-mail Todd Carothers at [carothen@uww.edu](mailto:carothen@uww.edu).

To ask for a meeting to learn more about Budget and Financial Planning contact [cricketg@uww.edu](mailto:cricketg@uww.edu).

### Additional Resources

Additionally the Chancellor's Cabinet is very involved and the leadership from governance groups attend monthly Cabinet meetings to stay informed.

At a System level you can listen in on Regents meetings, and many sessions are broadcast and materials on budget are readily available on-line <https://www.wisconsin.edu/regents/meetings/>

Engage in the Process Improvement Advisory Team (PIAT) or individual cost savings efforts – this is where you can be part of the solution and contribute to the budget and financial health of the university. [http://www.uww.edu/adminaffairs/process-improvement-advisory-team-\(piat\)](http://www.uww.edu/adminaffairs/process-improvement-advisory-team-(piat))

Recruit or retain students – reflect on what you and your area can do to help promote a student staying at UW-Whitewater or recruiting a new student. Refer students to all of the supports systems available on campus; advisors, student health, counseling, financial services, etc.

## Financial Plan—Strategic Alignment of Resources

### Financial Plan & Model—Present Broadly

<u>Date</u>	<u>Topic</u>
2/20/2019	Kick Off Retreat & Cabinet
2/22/2019	Intro To Financial Plan
3/4/2019-Present	Cabinet Meeting Updates (Monthly) - Includes Governance Members
4/03/2019-Present	PIAT—Efficiency & Cost Savings (Every two weeks)
4/10/2019-Present	Budget Manager Meeting (Monthly)
4/16/2019-Present	Academic Affairs Staff (AAS)
4/16/2019-Present	Strategic Plan Budget Committee
4/17/2019	PIAT—Efficiency & Cost Savings

## Refining (Group Work)

Core Team: Vice Chancellor Crickette, Todd Carothers, Henri Miller, Janelle Crowley, Kari Heidenreich & VC Team

<u>Date</u>	<u>Topic</u>
3/18/2019	Kickoff with CORE Team
3/12/2019-6/25/2019	CORE
3/15/2019	Allocation Discussion with Provost Office
4/17/2019-5/05/2019	Financial Planning Meetings with UW-W College Deans & Interim Provost

## Decision Making

<u>Date</u>	<u>Topic</u>
2/26/2019-Present	1:1 Chancellor (Date: Every Two Weeks)

## Other Meetings

<u>Date</u>	<u>Topic</u>
2/22/2019	Discussion of Financial Planning Process with Faculty Senate Representative
3/21/2019	Budget Training Session
4/23/2019	Faculty Budget Committee Meeting
7/17/2019	Financial Planning and Faculty Governance
8/07/2019	Administrative Affairs Town Hall Meeting
8/22/2019	Faculty Senate Officers Discussion
8/27/2019	Faculty Senate Executive Committee
9/4/2019	Hartwick Discussion
9/20/2019	Faculty Budget Committee
9/26/2019	All Faculty Listening Session
10/08/2019	Presented at Faculty Senate
10/15/2019	Fall Faculty Senate Meeting