

**Administrative Unit Name: Strategy Management & Finance Modernization**

Please complete this Word document and the accompanying Excel workbook (both of which were provided to your unit via email), and submit them to the Office of Planning & Budgeting (OPB) on or before **Friday, November 18**. Please email your materials to [Becka Johnson Poppe](#).

1. In the **“Planned Expenditures”** tab of the Excel workbook, please provide the following information for each functional area of your unit: <sup>1</sup>
  - a) A description of how the functional area **contributes to the University’s missions** (research, service and teaching) and the risks the University would face if this work were no longer funded;<sup>2</sup> and
  - b) Provide information regarding your unit’s **projected FTEs and planned expenditures for FY17 and FY18**:
    - i) Expenditure estimates should be broken down by:
      - *Fund type*: permanent ABB funds (i.e. GOF and DOF, excluding carryover) and, if applicable, funds derived from self-sustaining efforts, grants and contracts, philanthropy, and other sources.
      - *Expenditure type*: salaries and benefits, goods and services, contractual services, travel, and other.
    - ii) Please describe any assumptions you are making in your response, such as those related to the availability of state or federal funding or projections based on the first complete month of expenditures in FY17, etc. Also, please explain the “other” category, if you put expenses into that column.

For guidance, please see the example posted at the [FY18 Budget Development webpage](#).

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Please see Excel file.

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<sup>1</sup> “Functional area” is most easily described as a level of granularity that reflects your unit’s org chart and is reconcilable to your unit’s organization code structure. However, if this results in an unwieldy number of “functional areas” for your unit (i.e. more than 7 or 8), please note this in your materials and provide a more manageable level of granularity. As a general guideline, we anticipate 3-7 functional areas per unit.

<sup>2</sup> Please refer the following document for more information about the [University’s Sustainable Academic Business Plan \(SABP\) goals and top institutional risks](#).

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2. A number of variables (e.g. the outcome of the 2017 legislative session) will heavily influence the availability of funds for FY18 merit increases. Despite these unknowns, planning for compensation increases has no doubt begun already. Units should plan to receive less funding than may be necessary to implement the full average merit increases for GOF- and DOF-funded positions. **Please tell us how your unit plans to deploy existing resources, establish new revenue streams (if applicable), and/or pursue additional efficiencies to support merit increases in FY18. Please respond in 300 words or fewer.**
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**Organizational Excellence:**

OE has currently no permanent reserve to fund merit increases. We will fund merit using whatever allocation we receive from the Provost and may have to readjust our permanent budget to cover the rest.

**Planning & Management Admin, Strategy Management:**

Planning & Management Admin and Strategy Management currently do not have permanent funding on reserve to help supplement employee merit increases for GOF- and DOF-funded positions. We will fund merit using whatever allocation we receive from the Provost and may have to readjust our permanent budget to cover the rest.

**UW Sustainability:**

Based on a \$100,000 budget reduction for this biennium, we eliminated 1 FTE position (Assistant Director) and additional permanent funding from another position. UW Sustainability will allocate existing temporary funds for merit increases for FY18. In light of the decreased budget, UW Sustainability will begin fundraising for program support from external donors and funders per agreement with Advancement and UMAC. Since this is just beginning, we anticipate it will take this coming year to develop a plan and program to engage potential donors. Ultimately, fundraising activities will help offset central administration's reduced support of student internships, campus engagement (events, outreach, behavior change campaigns) and the Green Seed Fund, which was not funded for this biennium.

UWS has funding approved by the Provost Reimbursement Fund for 3 years (FY17, 18 & 19). 4% merit increases have been included in these budgets.

**Business Diversity Program:**

BDP has funding approved by the Provost Reimbursement Fund for 3 years (FY17, 18 & 19). 4% merit increases have been included in these budgets.

3. In spring 2015, Provost Baldasty initiated the **Transforming Administration Program (TAP)**, which encompasses all central administrative units and focuses on fulfilling the need for greater collaboration, clearer priorities, increased accountability, and elimination of unnecessary bureaucracy and redundancies.

Please answer the following questions:

- What are 3-5 new things that your unit is doing this fiscal year to align with the [TAP principles for central administrative units](#) and to create and enhance a culture of service? *Please respond within a 300-word bulleted list and please be specific.*
  - How can your unit collaborate with other units (academic and administrative units outside of your own) to be more effective and reduce costs? *Please respond in 200 words or fewer.*
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**Organizational Excellence (OE):**

- Adopted all TAP service standards including email response times, open calendar and email signatures
- Identified core services in preparation for the upcoming TAP Survey
- Rolled out short post project client survey to collect feedback and performance information. The results provide both quantitative and qualitative data and will be used internally for continuous improvement and eventually communicated externally as a summative evaluation
- Several OE staff are playing key roles in Solutions First Program development and implementation and planning and preparation for the TAP Survey
- The primary focus of **Organizational Excellence** is to work with Academic and Administrative units across all three campuses to find ways to help them be more effective and reduce administrative burden and costs.
- **OE's** unique cross campus view allows us to share best practices and lessons learned from other units with our clients allowing them to adopt more standardized approaches and solutions while streamlining the improvement process by eliminating the need to “reinvent the wheel”.
- Organizational Change Group (OCG), Professional and Organizational Development (POD), Lean Coffee – OE is connecting closely with OCG, POD and others who support change efforts on the campus to identify common approaches and share tools.

**UW Sustainability:**

- **Tri-campus Sustainability Reporting.** UW began the process of streamlining three campus reports on our sustainability performance efforts to one UW-wide to the Association for the Advancement of Sustainability in Higher Education (AASHE). This information is used by groups like the Princeton Review to score universities on their sustainability efforts which ultimately becomes a measure that students value when applying to universities. This project engages students, faculty, and staff across all three UW Campuses, improves process efficiency by reducing multiple reporting efforts, and delivers value for students and the university by strengthening the university's sustainability reputation.
- **Expanding Student EcoReps.** EcoReps is a program common on many campuses that provides students the opportunity to develop project management and leadership skills by identifying and implementing sustainability projects on campuses. We are collaborating with Bothell and Tacoma to expand the student engagement EcoReps model to engage students on all campuses.
- **Enhance website and communication platforms.** The UW Sustainability website ([green.uw.edu](http://green.uw.edu)) allows access to information and institutional transparency. The online sustainability dashboard provides

accountability to the UW's sustainability goals by tracking and publishing the university's progress. During this fiscal year, we are working to redesign our website to better align with UW branding, while also revamping the content for an enhanced, clear and relevant user experience. The website is leveraged to increase awareness and information thereby reducing the staff resources required to reach a diverse audience for all campuses.

- **Behavior change.** We focus on high level customer service standards for the Green Certification program that encourage and recognize sustainability in work place practices. Green Certifications support behavior change practices encouraging the campus community to learn, work and live sustainably. The Green Certification application process is online making it easy for participants to apply and receive certifications. UWS is also working with campus partners to promote a "GOOD DAWG!" outreach campaign to move the dial on many and diverse actions on campus, from energy conservation and alternative transportation to emergency preparedness and employee health and wellness.
- **Paper reduction.** The Paper Reduction Committee is comprised of cross-functional representatives from Seattle, Bothell and Tacoma and led by project leaders from Procurement Services and Creative Communications. It is responsible to implement the state mandate to reduce paper consumption by 30% and purchase only 100% PCR white bond copy paper. The UW Paper Reduction website is available here: <http://green.uw.edu/paper-reduction>. The Sustainability Dashboard (<http://green.uw.edu/dashboard/paper>) tracks metrics, which indicates a downward trend in aggregate paper purchased and per capita consumption.

**Business Diversity Program:**

- **Enhance website information.** <https://bdp.uw.edu/> The business diversity website is a resource for 3 audiences; the internal UW buying community, other governmental agencies, as well as, the external diverse business community. Creating a more robust website will allow for ease of access to important information for these audiences.
- **UWMC.** BDP is working with UWMC supply chain management to create a diverse business presence in their purchasing. UWMC Supply Chain Management will appoint a buyer within their department to act as the BDP champion and reinforce UW's commitment to inclusion & equity in their procurement practices.
- **Community Engagement.** BDP will focus more on community engagement to increase awareness about UW's commitment to equity & inclusion. The addition of a third staff member (temporarily funded through Provost Reinvestment Funds) within BDP will allow for stronger engagement and more of a presence within the diverse business community.
- **BDP & Its Champions.** BDP has worked hard to strengthen its relationships with Procurement Services, Capital Planning & Development and The Foster School of Business Consulting & Business Development Center. BDP will continue to utilize these relationships and will reinforce the collaboration over the coming years.

4. Please describe **your unit's emerging or changing personnel needs**—prompted by changes that either your unit or the institution is facing—and **what your unit will do to meet these needs without creating new FTE positions** (e.g. redeploying FTE among other functional areas). *Please respond in 300 words or fewer.*

At your unit's meeting with the Provost, **please be prepared to discuss your unit's succession planning activities.**

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**Organizational Excellence:**

Demand for Organizational Excellence services continues to be high and is growing. There are no plans to add additional FTE to meet this demand. We are working to meet increasing requests from clients by continuing to work closely with school, college, and unit leadership to ensure OE is applying resources to the highest strategic priority projects with the greatest opportunity for return.

**UW Sustainability:**

As a leading public research university, student and public interest and involvement with UW's carbon reduction and sustainability goals continue to increase requiring more support from UW Sustainability without additional FTE. We eliminated one FTE position for the biennium and prioritized staff time for essential duties. UWS partners and collaborates broadly with all units from all three campuses to maximize reach and impact. We do not have funding to add additional FTE.

**Business Diversity Program:**

The values of inclusion, equity and justice are central to the UW's mission as a public university, the continued commitment and fulfillment of those values is what the Business Diversity Program (BDP) seeks to deliver. Continued pressure to increase utilization of diverse suppliers from the small and diverse business community drives the mission and vision of BDP. In order to successfully & proactively engage a full range of business enterprises BDP must work diligently to ensure inclusion and to provide the maximum practicable opportunity. Recently, the top down support from UW leaders and the interest of utilization from the diverse business community has increased BDP's visibility on campus, and therefore, has placed more demand on the programs 2 FTE's, therefore a 3rd FTE was hired in November of 2016 and funded temporarily for 3 years by Provost Reinvestment Funds. BDP will continue to provide excellent customer service by being a resource, hosting outreach and networking events, attending external outreach events, and by providing support to all departments on campus.

5. **Please identify any significant obstacles or challenges** that your unit faces, other than resource constraints. Please plan to discuss these with the Provost. If applicable, please summarize any operational risks that, from your perspective, the UW must work to mitigate over time. *Please respond in 300 words or fewer.*
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**Organizational Excellence:**

Requests from UW units for Organizational Excellence support are increasing and cannot be always met, especially while redeploying OE staff and resources to support TAP and Solutions First initiatives, and potentially Finance Transformation. Schools/Colleges and Units need our assistance, and although OE builds capacity through knowledge transfer, most unit resources are unable to provide an equivalent level of skill internally unless they are willing to pay for outside consultants or through POD for a similar level of support.

**UW Sustainability:**

The reduction in budget presents a challenge to carry out our work to engage and track sustainability performance metrics across the university. The uncertainty of funding prevents UWS from developing long-term planning to support our Climate Action Plan goals and maintain leadership amongst higher education institutions. As a key employer in the state residing in the heart of our emerald city, UW's visibility of a green campus and sustainable university attracts the attention of our industry and government constituents, general public, business partners and future students. Decreased support to maintain the UW Sustainability program would pose a reputational risk to UW and lessen our strength as an innovative, green and sustainable campus.

**Business Diversity Program:**

As a driver of economic stability in the state of Washington, UW is in a position to be a leader and a champion of supplier diversity. Any decreased support from leadership or any decrease in budget would leave BDP, as well as, UW at risk of backlash and negative scrutiny from the very community that we are in and that we serve.

6. Please **update the carryover usage plan you submitted as part of last year’s budget development process**. To do so, please complete the **“Updated Carryover Usage Plan” tab** of the Excel workbook. Please note:

- Your worksheet is pre-populated with the carryover usage plan you submitted last year, new estimated carryover totals, and new reserve figures.<sup>3</sup>
- Please provide updated numbers under "Updated Plan" (Columns H-K).
- If you have new line items, please add rows, as needed.
- For any major updates, please provide a brief description of the change (Column L).

Please note, although cost allocations for the HR/Payroll Modernization Program won’t be available until the new system goes live, units are encouraged to incorporate the original allocations (from the HR/Payroll Cost Allocation plan) into their carryover spending plans. For units that made prepayments, all funds have been held in reserve, and will be applied to your future cost allocations.

If you would like to describe any items from the worksheet in greater detail, please use the space below. For **additional guidance**, please see the example posted at the [FY18 Budget Development webpage](#).

If your unit has a **deficit** instead of a carryover, please confirm that you have an updated deficit mitigation plan in place with OPB. If you do not, please explain why.

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Please see Excel file.

7. For FY18, the Provost will be deploying *permanent* Provost Reinvestment Funds (PRF) primarily, if not exclusively, to cover compensation increases. Thus, **units are asked to limit PRF requests to temporary funding needed to address critical compliance and/or high institutional priority needs.**<sup>4</sup>

If your unit has a PRF request that fits within these strict parameters, please describe it in the **“PRF Request” tab** of the Excel workbook. Please also indicate what you are willing to commit as a match for PRF support.

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As part of FY16 budget process, UW Sustainability and Business Diversity Program were already approved temporary funding for 3 years (starting with FY17).

No new requests.

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<sup>3</sup> As a reminder, carryover balances are calculated at the end of each biennium and can only be *estimated* mid-biennium.

<sup>4</sup> Please refer to the University’s [Sustainable Academic Business Plan](#) for more information about top institutional goals.

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## FY17 & FY18 Planned Expenditures - Administrative Units

Please use the fields below to provide information for **each functional area** of your unit. "Functional area" is most easily described as a level of granularity that reflects your unit's org chart and is reconcilable to your unit's organization code structure. However, if this results in an unwieldy number of "functional areas" for your unit (i.e. more than 7 or 8), please provide a more manageable level of granularity. As a general guideline, we anticipate 3-7 functional areas per unit.

For guidance, please see the example posted at the FY18 Budget Development webpage: <http://opb.washington.edu/fy18-unit-budget-development>

BT = Budget Type    OC = Object Code

<b>NAME OF AREA: Planning &amp; Management Admin (P&amp;M Admin)</b>						
<i>UW Planning &amp; Management (P&amp;M) is responsible for University Strategy Management, Special Projects and Finance Transformation, which manage, implement and report on selected strategic initiatives to the Board of Regents, President, Provost and senior leadership.</i>						
<i>University Strategy Management (SM) facilitates strategy development and change across the campus by managing and reporting business performance, communicating with customers, supporting development of campus staff, and leading and facilitating campus-wide projects and programs. SM Admin provides administrative and financial support to all five units under SM as well as the EVP.</i>						
<i>Special Projects provides strategic planning, oversight and analysis for major, system-wide projects at the UW.</i>						
<i>Finance Transformation assesses and tests the replacement of shadow financial systems in the effort to modernize core administrative systems at the UW.</i>						
<i>UW P&amp;M serves to lead, facilitate and implement change and development campus wide in alignment with the university's mission and core initiatives. Without its services, key initiatives, projects and programs, including the transformation of central administration, business diversity and sustainable measures at UW, would lose strong oversight, organizational development and assessment, system modernization, sponsorship and advocacy.</i>						
FISCAL YEAR 2017						
Fund Source	FTE	Projected Expenditures (in \$)				
		Salaries & Benefits (OC: 01, 07)	Goods & Services (OC: 03, 05, 06)	Contractual Services (OC: 02)	Travel (OC: 04)	Other (OC: 08-21)
GOF/DOF, excluding carryover (BT 01)	4.56	\$ 789,576	\$ 100,000			
Self-Sustaining Funds (BT 10, 11)						
Grants & Contracts (BT 05)						
Philanthropy, or Gifts & Discretionary (BT 06)						
<b>Total</b>	<b>4.56</b>	<b>\$ 789,576</b>	<b>\$ 100,000</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ -</b>
FISCAL YEAR 2018						
Fund Source	FTE	Planned Expenditures (in \$)				
		Salaries & Benefits (OC: 01, 07)	Goods & Services (OC: 03, 05, 06)	Contractual Services (OC: 02)	Travel (OC: 04)	Other (OC: 08-21)
GOF/DOF, excluding carryover (BT 01)	5.00	\$ 982,580	\$ 100,000			
Self-Sustaining Funds (BT 10, 11)						
Grants & Contracts (BT 05)						
Philanthropy, or Gifts & Discretionary (BT 06)						
<b>Total</b>	<b>5.00</b>	<b>\$ 982,580</b>	<b>\$ 100,000</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ -</b>
<i>Salaries &amp; Benefits section includes an hourly student employee who provides IT support to PMA/SM. Figure(s) include 4% merit increase.</i>						



**NAME OF AREA: Organizational Excellence (OE)**

Approximately 30% of OE's effort is focused on supporting and delivering Executive Sponsored initiatives (i.e., TAP, Culture of Service, and similar strategic efforts).

- Risk: Without OE resources, the Executive Office would be limited in rolling out key initiatives and would need to utilize outside consultants with limited knowledge of campus culture and operations

Another 30% of OE's effort is focused on supporting projects for Schools, Colleges and Central Administration through the development of strategies, assessment of organizational operations and improving effectiveness.

- Risk: Without OE resources, departments would face several alternative options: 1) pay for external consultants – accruing costs as well as potential time loss during vendor selection, onboarding, etc., 2) attempt the work with departmental resources – taking time away from core responsibilities 3) or do nothing – missing opportunities for improvement and potentially increasing risk

Additionally, approximately 25% of OE resources are focused on developing and delivering programs, training and models to build staff capacity across campus.

- Risk: Without OE resources, UW staff would have limited opportunities to connect with others to learn best practices, new models, tools and approaches, while increasing their skill sets. Alternative options would carry costs and may not be aligned with University strategy and standards.

**FISCAL YEAR 2017**

Fund Source	FTE	Projected Expenditures (in \$)				
		Salaries & Benefits (OC: 01, 07)	Goods & Services (OC: 03, 05, 06)	Contractual Services (OC: 02)	Travel (OC: 04)	Other (OC: 08-21)
GOF/DOF, excluding carryover (BT 01)	7.50	\$ 915,434	\$ 47,340	\$ 60,000	\$ 15,650	
Self-Sustaining Funds (BT 10, 11)						
Grants & Contracts (BT 05)						
Philanthropy, or Gifts & Discretionary (BT 06)						
<b>Total</b>	<b>7.50</b>	<b>\$ 915,434</b>	<b>\$ 47,340</b>	<b>\$ 60,000</b>	<b>\$ 15,650</b>	<b>\$ -</b>

**FISCAL YEAR 2018**

Fund Source	FTE	Planned Expenditures (in \$)				
		Salaries & Benefits (OC: 01, 07)	Goods & Services (OC: 03, 05, 06)	Contractual Services (OC: 02)	Travel (OC: 04)	Other (OC: 08-21)
GOF/DOF, excluding carryover (BT 01)	7.50	\$ 993,383	\$ 47,340		\$ 15,650	
Self-Sustaining Funds (BT 10, 11)						
Grants & Contracts (BT 05)						
Philanthropy, or Gifts & Discretionary (BT 06)						
<b>Total</b>	<b>7.50</b>	<b>\$ 993,383</b>	<b>\$ 47,340</b>	<b>\$ -</b>	<b>\$ 15,650</b>	<b>\$ -</b>

Salaries & Benefits section includes an hourly student employee who provides administrative support to OE. Figure(s) include 4% merit increase.

**NAME OF AREA: UW Sustainability (UWS)**

*UWS is responsible for supporting the University's Climate Action Plan (CAP) goals reported to the American College & University Presidents' Climate Commitment (signed by President Emmert in 2007 and reasserted by President Young when he arrived) and UWS supports Executive Order No. 13 and the Environmental Stewardship Committee (ESC) composed of senior leadership reporting to the President, Provost and Senior Vice President. UWS oversees the work of the Campus Sustainability Fund (student funded), the Green Seed Fund (administration funded), reporting to STARS, Sierra Club, Princeton Review and others and the ESC committees. UW increases the University's visibility and is seen as a global leader in sustainability – due to research, classes taught, the integration of operations, leadership support within the academy, and active engagement in nationwide sustainability activities including recent White House Climate Pledge. UWS engages students, faculty, staff and donors through behavior change educational campaigns, events, internships and Green certification programs.*

**FISCAL YEAR 2017**

Fund Source	FTE	Projected Expenditures (in \$)				
		Salaries & Benefits (OC: 01, 07)	Goods & Services (OC: 03, 05, 06)	Contractual Services (OC: 02)	Travel (OC: 04)	Other (OC: 08-21)
GOF/DOF, excluding carryover (BT 01)	4.25	\$ 412,660	\$ 108,022			
Self-Sustaining Funds (BT 10, 11)	0.50	\$ 51,305				
Grants & Contracts (BT 05)						
Philanthropy, or Gifts & Discretionary (BT 06)						
<b>Total</b>	<b>4.75</b>	<b>\$ 463,965</b>	<b>\$ 108,022</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ -</b>

**FISCAL YEAR 2018**

Fund Source	FTE	Planned Expenditures (in \$)				
		Salaries & Benefits (OC: 01, 07)	Goods & Services (OC: 03, 05, 06)	Contractual Services (OC: 02)	Travel (OC: 04)	Other (OC: 08-21)
GOF/DOF, excluding carryover (BT 01)	4.25	\$ 429,665	\$ 97,572			
Self-Sustaining Funds (BT 10, 11)	0.50	\$ 53,357				
Grants & Contracts (BT 05)						
Philanthropy, or Gifts & Discretionary (BT 06)						
<b>Total</b>	<b>4.75</b>	<b>\$ 483,022</b>	<b>\$ 97,572</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ -</b>

*Goods & Services section includes student hourlies. Figure(s) include 4% merit increase.*

**NAME OF AREA: Business Diversity Program (BDP)**

The values of inclusion, equity and justice are central to the UW's mission as a public university, the continued commitment and fulfillment of those values is what the Business Diversity Program (BDP) seeks to ensure. BDP proactively engages and supports a full range of business enterprises, including small, minority, and women-owned businesses to ensure inclusion and to provide the maximum practicable opportunity to participate in competition for any and all procurement and contracting by the University. BDP works closely with Procurement Services, Capital Planning & Development and the Foster School to advance in this area. Per RCW 39.19, UW is required to report spend with Washington Office of Minority and Women Business Enterprises (OMWBE) certified businesses to the State. Currently, BDP is working on tracking dollars spent with all minority and women owned businesses certified or not. The recent approval of the Statement of Business Equity Regents Policy No. 16 came from growing concerns in the business community about UW's lack of performance in business equity. BDP recently hired a third staff member (temporarily funded through Provost Reinvestment Funds) to address these issues and plan to have a stronger presence within the diverse business community.

**FISCAL YEAR 2017**

Fund Source	FTE	Projected Expenditures (in \$)				
		Salaries & Benefits (OC: 01, 07)	Goods & Services (OC: 03, 05, 06)	Contractual Services (OC: 02)	Travel (OC: 04)	Other (OC: 08-21)
GOF/DOF, excluding carryover (BT 01)	2.67	\$ 252,357	\$ 25,332			
Self-Sustaining Funds (BT 10, 11)						
Grants & Contracts (BT 05)						
Philanthropy, or Gifts & Discretionary (BT 06)						
<b>Total</b>	<b>2.67</b>	<b>\$ 252,357</b>	<b>\$ 25,332</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ -</b>

**FISCAL YEAR 2018**

Fund Source	FTE	Planned Expenditures (in \$)				
		Salaries & Benefits (OC: 01, 07)	Goods & Services (OC: 03, 05, 06)	Contractual Services (OC: 02)	Travel (OC: 04)	Other (OC: 08-21)
GOF/DOF, excluding carryover (BT 01)	3.00	\$ 288,424	\$ 49,576			
Self-Sustaining Funds (BT 10, 11)						
Grants & Contracts (BT 05)						
Philanthropy, or Gifts & Discretionary (BT 06)						
<b>Total</b>	<b>3.00</b>	<b>\$ 288,424</b>	<b>\$ 49,576</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ -</b>

Goods & Services section includes student hourlies. Figure(s) include 4% merit increase.

## Updated Carryover Usage Plan - Administrative Units

Please use this template to provide an update on the carryover usage plan you submitted last year.

**INSTRUCTIONS:** Please do not change the numbers under "Previous Plan" (Columns C-F). Instead, please provide updated numbers under "Updated Plan" (Columns H-K). If you have new line items, please add rows, as needed. For any updates, please provide a brief description of the change (Column L). See the Word template for notes regarding HR/Payroll cost allocations.

For additional guidance, please see the example posted at the FY18 Budget Development webpage: <http://opb.washington.edu/fy18-unit-budget-development>

**PLEASE NOTE:** Strategy Management used to be part of Planning & Management. The "Previous Plan" shown here was provided by Planning & Management for the FY17 budget process.

	PREVIOUS PLAN (Do Not Update)				Carryover into FY16: \$ 1,350,239	UPDATED PLAN (Please Complete)				Est. Carryover into FY17: \$ 1,217,182 *
Unit: Strategy Management	Committed Year(s)	# of Years	Annual \$ Amount	Totals	Committed Year(s)	# of Years	Annual \$ Amount	Totals	Explanation of Changes/Updates	
<b>Usage Categories and Descriptions</b>										
<b>Unit's Reserve (10% of permanent ABB budget)</b>										
	FY17	1	\$ 537,650	\$ 537,650	FY18	1	\$ -	\$ 1,099,197	Amount requires further discussion	
	<b>Total Unit's Reserve:</b>			<b>\$ 537,650</b>	<b>Total Unit's Reserve:</b>			<b>\$ 1,099,197</b>		
<b>Central Commitments</b>										
1. P&M Admin: South Campus Study (carryover from FY15)	FY16	1	\$ 200,000	\$ 200,000	e.g. FY17- FY19	e.g. 3		\$ -	Completed in FY16	
2. P&M Admin: Campus Master Plan (carryover from FY15)	FY16	1	\$ 324,402	\$ 324,402				\$ -	Completed in FY16	
3. P&M Admin: Business Diversity Program bridge funding	FY16, FY17	2	\$ 13,000	\$ 26,000				\$ -	Completed in FY16, Not needed in FY17	
				\$ -				\$ -		
<i>Add more lines as needed</i>								\$ -		
	<b>Total Central Commitments:</b>			<b>\$ 550,402</b>	<b>Total Central Commitments:</b>			<b>\$ -</b>		
<b>"Spending Plan" Permanent Costs &amp; Other Projects</b>										
<b>A. Perm expenditures funded with temp funds</b>				\$ -				\$ -		
				\$ -				\$ -		
				\$ -				\$ -		
<b>B. Possible multi-year commitments</b>				\$ -				\$ -		
				\$ -				\$ -		
				\$ -				\$ -		
<b>C. Immediate, current year use</b>										
1. P&M Admin: Fund developers to work on with IT's EDW	FY16	1	\$ 150,000	\$ 150,000				\$ -	Completed in FY16	
2. P&M Admin: Institutional overhead calculation methodology review	FY16	1	\$ 46,000	\$ 46,000				\$ -	Completed in FY16	
3. P&M Admin: Climate change action plan	FY16	1	\$ 35,000	\$ 35,000	FY17	1	\$ 35,000	\$ 35,000	On-going annual commitment	
4. P&M Admin: Space update for OE/TAP work	FY16	1	\$ 20,000	\$ 20,000				\$ -	Completed in FY16	
5. P&M Admin: Responsible Party training tool development	FY16	1	\$ 3,500	\$ 3,500				\$ -	Completed in FY16	
6. P&M Admin: Public art conservation	FY16	1	\$ 39,530	\$ 39,530				\$ -	Completed in FY16	
7. P&M Admin: IT support					FY17	1	\$ 17,685	\$ 17,685	On-going annual commitment	
7. OE: TAP Admin Unit Survey					FY17	1	\$ 60,000	\$ 60,000	Use FY16 carryover to fund TAP Central Admin Unit Survey	

7. BDP: Outreach event
<i>Add more lines as needed</i>

			\$ -

**Total Permanent Costs & Other Projects: \$ 294,030**

**PRIOR PLAN TOTAL: \$ 1,382,082**

FY17	1	\$ 5,300	\$ 5,300	Foster School Business Growth Collaborative; National Minority Development Council; MLK Day Celebration; Seattle Medium Newspaper Group
			\$ -	

**Total Permanent Costs & Other Projects: \$ 117,985**

**UPDATED PLAN TOTAL: \$ 1,217,182 \*\***

\* As a reminder, carryover balances are calculated at the end of each biennium and can only be *estimated* mid-biennium.

\*\* Because carryover balances are estimated, and many of these priorities transcend multiple years, we do not expect this total to exactly match your unit's carryover total.