

MAKING BUDGET DECISIONS: ALIGNING RESOURCES WITH PRIORITIES

In light of the current budget situation, we are all exploring creative ways to sustain our excellence during a time of declining resources. Following is a list of questions you might use to engage faculty and staff in discussions to identify cost reduction strategies. The order of the questions is deliberate, starting with principles and priorities to lay a foundation for strategic decisions.

To make this exercise as useful as possible, clarify who will make the final decisions. Clarify for those involved in the discussions whether they are providing input and feedback to the leader or a governance committee or whether the group is making the decisions.

Questions to Consider for Budget Discussions:

1. Identify principles that will guide the budget deliberations. (e.g. sustain quality, ensure ability to invest in our priorities, etc.)
2. Identify functions, programs, services or units most essential to protect.
 - To what extent is the function, program, service or unit a priority in the campus strategic plan? (See <http://www.chancellor.wisc.edu/strategicplan/>) In our own strategic plan?
 - How critical is the function, program, service, or unit to our overall mission or purpose? Why?
 - What do we know about the quality of the function, program, service or unit as measured by those served?
 - To what extent does the function, program, service or unit generate resources, such as research funding?
3. Discuss how these essential programs and services could be done more efficiently, or with fewer resources.
 - How could streamlining or technology make them more efficient?
 - Are there best practices to learn from others?
 - Consider potential benefits of partnering, restructuring, or consolidation.
4. What are ways we might generate additional revenues? Are there ways we might shift funding sources?
5. Identify functions, programs, services or units that could possibly be reduced, restructured, or eliminated. Consider the following criteria in deciding which to do:
 - Potential savings: time, cost, results. Short term. Long term.
 - Impact on services. On whom?
 - External perceptions. Political implications.
 - Quality/effectiveness sustained or improved.
 - Complexity – how hard is it to do?
 - Unintended negative effects on climate, costs, etc.Note: These criteria can also be helpful in #3.