

Budget, Planning and Analysis

Mission, Vision and Values

Mission: The Office of Budget, Planning and Analysis guides UW-Stout's financial and facilities planning processes, develops the operational and capital budgets, manages institutional studies and statistical information, facilitates organizational assessment and improvement, coordinates university policies and procedures, assists faculty and students with their research, and performs scanning of evaluations and tests.

Vision: The Office will advocate effective and efficient use of university resources through planning, analysis, research, alignment of resources to plans and accountability of use. This advocacy will promote discussion and understanding of critical budget, planning and research issues and will encourage informed decision-making.

Values:

The Office of Budget, Planning and Analysis values:

- *Active campus involvement* throughout the budgeting and planning processes;
- *Collaborative relationships* with each of the divisions, colleges, units, faculty, staff and students in the development and implementation of surveys and studies;
- *Innovative budgeting ideas* that diversify and broaden revenue sources and /or reduce operating expenses while still providing a high-quality learning and living environment for students and a high-quality work environment for faculty and staff;
- *Open communication* and easy access to information on campus;
- *Independent and objective data* distributed in a timely manner.

Goals and Specific Responsibilities

- Create a budget process which clearly identifies issues, incorporates planning, establishes accountability factors and provides follow-up reporting.
- Provide research and analysis of budget issues.
- Explore new accountability processes such as responsibility center budgeting.
- Facilitate an in-depth review of existing budget allocations (i.e., non-instructional unit review).
- Identify effective communication mediums (i.e., newsletter, WWW, personal contacts).
- Explore appropriate benchmark and assessment criteria for the university as a whole and for individual functions.
- Provide information and analysis to support institutional planning and decision-making.
- Facilitate the development of an analytic data warehouse.
- Create a participatory and effective capital planning and budget process.

Specific Responsibilities

Administer the Annual and Biennial Operating Processes

- Communicate with administrative and governance groups on the budget process and budget issues.
- Perform budget analyses.
- Develop assumptions and constraints for the upcoming budget cycle.
- Process requests and make recommendations on segregated, room, board and other auxiliary fee increases.
- Assist the Stout Student Association with segregated fee planning and revenue budgeting.
- Develop the tuition revenue budget.
- Review and process rate requests.
- Prepare the university's current and long range budget plans.
- Prepare the auxiliary's current and long range budget plans.
- Provide training and support to departments, colleges, and divisions throughout the budget development cycle.
- Coordinate the laboratory/classroom modernization and general computer access programs.
- Propose distribution of resources.
- Coordinate UW System information needs for the biennial budget process.

Administer the Planning and Capital Budget Process

- Coordinate and facilitate UW-Stout's capital (facilities) planning activities through dialogue and discussion.
- Coordinate and facilitate submission of UW-Stout's biennial capital budget and capital budget project requests.
- Assist in the implementation of the biennial capital budget.
- Assist with communication related to Planning and the Capital Budget with UW System, the Campus, City officials, and the community.
- Respond to ad hoc requests for reports to UW System.

Perform Fiscal Analyses and Support Fiscal Policy Development

- Prepare short-term fiscal analyses and long-term fiscal projections.
- Prepare a university year-end budget review.
- Prepare the auxiliary reserve management plan and year-end reserve accountability report.
- Prepare and analyze sub-activity code data.
- Conduct special financial studies.
- Support the development of fiscal policy.

Support Institutional Planning

- Support the institution's planning processes including academic, strategic and capital.
- Develop linkage of the institutional planning processes to the annual operating budget process.
- Develop budget planning to implement institutional planning outcomes.

Perform Institutional Research

- Design and prepare research studies, forecasts and analyses to support institutional planning and decision-making.
- Examine future trends and the impact to the university.
- Prepare and coordinate the reporting of institutional research information for external agencies and internal offices.
- Coordinate the design, implementation and analysis of major institutional surveys.
- Support enrollment management.
- Develop an analytic database to support the use of data in decision-making (i.e., an executive information system/data warehouse.)
- Serve as UW-Stout's CDR (Central Data Request) liaison.
- Consult with university personnel to assist their research on university related issues.
- Assist faculty, staff and students with their research.
- Perform scanning of evaluations and tests.

Annual Reports

- [2008-2009](#)
- [2007-2008](#)
- [2006-2007](#)
- [2005-2006](#)
- [2004-2005](#)

Action Plans

- [2009-2010](#)
- [2008-2009](#)
- [2007-2008](#)