





WILLIAM & MARY

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OFFICE OF THE PROVOST

MEMORANDUM

TO: Virginia M. Ambler, Vice President for Student Affairs
Henry R. Broaddus, Vice Provost for Strategic Initiatives & Public Affairs
Carrie L. Cooper, Dean, University Libraries
Maria Donoghue Velleca, Dean, Faculty of Arts & Sciences
Stephen E. Hanson, Vice Provost for International Affairs and Director, Reves Center for International Studies
Dennis M. Manos, Vice Provost for Research and Graduate/Professional Studies
Robert C. Knoeppel, Dean, School of Education
Lawrence B. Pulley, Dean, Mason School of Business
A. Benjamin Spencer, Dean, William & Mary Law School
Ann Marie Stock, Vice Provost for Academic and Faculty Affairs
John T. Wells, Dean, School of Marine Science and Director, Virginia Institute of Marine Science

FROM: Peggy Agouris, Provost 
Amy Sebring, Chief Operating Officer 

DATE: December 2, 2020

SUBJECT: Invitation to the Budget Advisory Workgroup

Building on the budget planning work completed for FY21 through the Mission Critical Budget process, we would like to initiate and invite you to an ongoing budget advisory workgroup of the key resource decision makers on the instructional and research side of the university.

This group will be advisory to us in our roles as provost and chief operating officer as we take a deeper look at the strategies, priorities and recommendations related to the FY22 budget and how best to position ourselves programmatically and financially for the near future. For example, this group will be involved in discussions related to:

- Budget reduction strategy for FY22;
- Alignment of resources with the initial work underway on the provost's key planning areas for FY22 in sustainable curriculum, research activity, online/remote instruction, and inter-/multi-disciplinary framework;
- Current and prospective student interests and workforce needs compared with our ability to respond;

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- New revenue opportunity areas; and
- Development of an annual budget planning process at the university level

We anticipate there may be instances where you will want to engage members of your team directly in these discussions. However, your direct participation in this process is important, so we ask that you not designate this responsibility to someone else on your team.

The work of this group, along with the provost's planning areas for FY22, will feed into the university's strategic planning process when it resumes. The early work of this group will also be shared with the various assemblies for their review and input as the planning progresses. Operational areas will be added to the process as specific areas are discussed.

Members of this workgroup will be expected to participate with both a program specific perspective as well as a broader university perspective. They will also be expected to have a process within their own units to help inform and gather strategic information to bring to these discussions. Finally, there will be an expectation that the advisory recommendations and subsequent decisions of this workgroup will be evidence-based with relevant data.

A kickoff of this effort will be scheduled in December with regular meetings to resume shortly after since the FY22 budget planning timeframe is rapidly approaching. The initial meeting will be to provide an in-depth overview of the current state of the university's budget, including a breakdown by major budget units, as well as the dynamics that impact the availability of resources. In addition, the Board of Visitors has signaled that they will likely approve tuition and fees for all programs at the February Board meeting, so we will need to engage quickly in a discussion of how to incorporate that work into the work of this group as well.

In advance, we greatly appreciate your willingness to participate in this important effort. Please look for an invitation from Christy Fiedler for our first meeting in December.

PA/AS/cef

c: Jacob S. Long, Assistant Vice President for Budget & Financial Planning
Martha Wescoat-Andes, Senior Associate Provost for Planning & New Ventures