# Rewriting the University Budget Committee (UBC) Charge

## What is the desired outcome of this priority?

A revised charge for UBC that reflects a more deliberative and engaged body of campus stakeholders and an inclusive membership.

## Current State

Charge focuses primarily on membership and required meetings. Charge names UBC as an advisory committee but does not provide guidance on how to best perform that role.

## Metrics

- Inclusiveness of input and participation in rewriting the charge;
- Timeliness of rewriting the charge;
- Ratification of charge by UBC;
- President’s approval of rewritten charge.

## Desired State

A charge that expands guidance on the UBC can be more engaged and deliberative in role as an advisory committee to the President for budget issues. A charge that optimizes the inclusiveness of the UBC’s membership.

## Who will be the executive sponsor(s) for this priority?

Vice President and Provost Jennifer Summit (co-chair of the UBC)

## Who else will lead the effort for this priority?

[Add subcommittee names here.]

## What are next steps for this priority?

- Convene subcommittee of existing UBC members to work on this priority.
- Draft rewritten charge.
- Circulate draft for review and comment by UBC members.
- Gain consensus among UBC members for the revised charge.
- Forward charge to President Mahoney for approval.

## How will we monitor the progress on this priority?

- Milestones by date.
- Final approval by President (target - June 1, 2020)
# Budget Literacy

## What is the desired outcome of this priority?

A UBC membership that has a working knowledge of CSU/SFSU budget language, the budget cycle, and budget decision-making processes; expanded budget literacy across the campus.

## Current State

The complexity of the CSU/SFSU budget process is further complicated by inconsistent terminology; concepts are presented out of context making it difficult for the UBC to fulfill its advisory role; communication is not consistent.

## Metrics

UBC: improved understanding of the budget language, cycle, and decision-making processes; A&F: published budget resources (glossary, decision-making processes, real-time updates); expanded budget literacy across campus - outreach to constituent groups (student groups, faculty groups, administrator and staff groups).

## Desired State

Consistent resources for budget language, a well-understood budget cycle, and transparent budget decision-making processes; expanded budget literacy across the campus; UBC members equipped to fulfill their advisory role.

## Who will be the executive sponsor(s) for this priority?

Vice President and CFO Jeff Wilson (co-chair of the UBC)

## Who else will lead the effort for this priority?

[Add subcommittee names here.]

## What are next steps for this priority?

- Convene subcommittee of existing UBC members to work on this priority.
- Outreach to campus constituent groups to identify literacy gaps.
- Present resources to UBC; gain consensus around resources.
- Undertake broad outreach efforts to share resources with campus community.

## How will we monitor the progress on this priority?

Milestones: convene subcommittee; outreach; publication and presentation of resources

Calendared outreach efforts
## Budget and Fiscal Policy

**What is the desired outcome of this priority?**

To have a set of budget and fiscal policies that inform campus decision-making around financial and budget matters. Policies will reflect collaborative design and implementation, technical compliance, and optimal control and flexibility.

<table>
<thead>
<tr>
<th>Current State</th>
<th>Metrics</th>
<th>Desired State</th>
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<tbody>
<tr>
<td>Very few campus policies exist around financial and budget decision making. Policies are created as they are needed - usually centrally without collaborative consultation.</td>
<td>Inclusiveness of policy design and implementation; adherence to compliance requirements; quality of policies to inform decision making; quality of policies to provide optimal centralized control and cross-unit flexibility.</td>
<td>A library of policies and resources that inform the campus of our approach for budget and fiscal decision making as agreed upon through an inclusive policy design and implementation process; marked levels of improved trust between central administration and units around budget and fiscal decision-making.</td>
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**Who will be the executive sponsor(s) for this priority?**

Vice President and CFO Jeff Wilson (co-chair of the UBC)

**Who else will lead the effort for this priority?**

[Add subcommittee names here.]  
[Add technical working group names here.]

**What are next steps for this priority?**

- Reconvene subcommittee to address this priority.
- Identify budget and fiscal areas that need policies in the short-term.
- Convene technical working group to draft policies.
- Gain consensus from subcommittee for draft policies.
- Present draft policies to UBC for consensus approval.

**How will we monitor the progress on this priority?**

- Milestones: reconvene subcommittee; convene technical working group; ID policy priorities.
- Present draft policies to UBC for consensus approval.
### UBC Communication and Outreach

#### What is the desired outcome of this priority?

The UBC will define, coordinate, and publicize communication and outreach to the campus community for budget-related matters. The campus community members will be informed in a timely, engaged manner.

#### Current State

- **A&F/University Budget Office** provides most communication and outreach efforts around the budget process. The communication is defined and presented by A&F. The communication and outreach are historical.

#### Metrics

**A & F**

#### Desired State

- **UBC** defines communication and outreach efforts (what, when, how, where). Campus engages with communication and outreach. Expanded budget literacy across campus.

#### What are next steps for this priority?

- Convene subcommittee to address this priority.
- Subcommittee identify communications and outreach priorities.
- Convene technical/support working group to prepare communications/outreach resources.
- Gain consensus from subcommittee to go forward with communications/outreach resources.
- Publish/Schedule/Deliver communications and outreach priorities.

#### How will we monitor the progress on this priority?

**Milestones:**
- Convene subcommittee; convene technical/support working group; ID C/O priorities
- Publish/Schedule/Deliver communications and outreach priorities.