## Unit Goals: Budget Office

<table>
<thead>
<tr>
<th>Goal</th>
<th>Key Metrics/Milestones</th>
<th>Goal Drivers</th>
<th>Status</th>
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</table>
| **Goal 1:** Achieve financial stability by resolving the campus structural deficit. *(FY24 – FY27)* | • Financials in the black, central reserves within target range and not in jeopardy of decreasing below healthy levels (3 months of operating).  
• Specific targets defined and approved by campus leadership.  
• Additional space/lease savings by FY25-$3M.  
• Development of new rates and implementation plan. | • Core revenue growth is less than expense growth. | [ ] [ ] [ ] [ ] [ ] |
| P4 – DFA-D | **Goal 2:** Develop a new budget model for the campus to improve alignment of resources with strategic goals, and improve clarity, predictability, and transparency. *(FY24 – FY27)* | • Outreach to other higher education institutions.  
• Model funding stream alternatives based on various metrics.  
• Budget model and phase-in plan for academic units.  
• Budget model and phase-in plan for support units. | • Need for improved planning. | [ ] [ ] [ ] [ ] [ ] |
| P4 – DFA-D | **Goal 3:** Develop a new central budget office commitment tracking tool to improve accuracy for reporting, tracking of available funding, and forecasting models of central obligations. *(FY24 – FY24)* | • Reduce time to request, approve, and document a supplemental commitment.  
• Improve communication, transparency and customer service experience.  
• Improve access and accuracy of current data and reports.  
• Improve accuracy and time required copying over to the next year’s budget plan. | • Set the stage for improved reserve management. High reserves are a risk to the campus. | [ ] [ ] [ ] [ ] [ ] |
| P4 – DFA-D | **Goal 4:** Create a common fund to make the budget allocation and financial management processes less cumbersome and reduce the number of funds and accounts being used. *(FY24 – FY25)* | • Reduce number of funds used for core budget allocations.  
• Reduce processing time, increased accuracy and accessibility. | • Operational efficiency for campus financial managers. | [ ] [ ] [ ] [ ] [ ] |
| P4 – DFA-D | **Goal 5:** Improve budget office processes related to communications, documentation, and training. *(FY24 – FY24)* | • One new communication enhancement implemented by mid-winter in FY24. Functional areas and glossary by 1/31/24; best practice updates (e.g., budget process, final budget) by 3/31/24.  
• Conduct a customer satisfaction survey after roll-out of the budget model. | • Increase transparency. | [ ] [ ] [ ] [ ] [ ] |
## Unit Goals: Budget Office (cont.)

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| **Goal 6:** Develop improved financial reports using reporting tools to automate existing download and manual update processes. *(FY24 – FY24)* | • Reduce time to run reports (data) and roll forward (formatting) the new FY.  
• Replace internal report by 12/31/23. Publish report for campus use by 3/31/24.  
• Publish year-end forecast reports to org/units. | • Better reports, more informed recommendations and decisions. | ![Progress](#) |
| **Goal 7:** Coordinate with Academic Planning, Graduate Division, and Academic Senate to improve processes related to new program review. *(FY24 – FY25)* | • Improve contribution of academic enterprise.  
• Track programs that don’t make it to approval in addition to ones that do.  
• Measure error rates in forecast. | • Improve guidance and consistency of information. | ![Progress](#) |
| **Goal 8:** Improve Budget Office transactional processes. *(FY24 – FY28)* | • Increased automation for processes related to budget upload via LLCP document, staffing, intercampus transfer of funds. | • Reduce time on transactions so we can spend on value added analysis. | ![Progress](#) |
| **Goal 9:** Ensure that all student fee processes are completed on time, appropriate review and consultation is completed on rate proposals, and guidance and materials are consistent with UC policies. *(FY24 – FY28)* | • Included in scope are Professional Degree Supplemental Tuition (PDST), Self-Supporting Graduate Professional Degree Program (SSGPDP), Course Material & Services Fees (CMSF), Student Service Fee (SSF), referenda, student intent to register (SIR), and miscellaneous fees as well as oversight of student fee advisory committee. | • Ensuring smooth transition after turnover. | ![Progress](#) |
| **Goal 10:** Pursue a long-term budget solution that will support campus and unit planning. *(FY24 – FY28)* | • Complete research and identify a recommended tool by 6/30/2027.  
• Develop implementation plan consistent with resource availability. | • A new budget system would be best practice. | ![Not started](#) |

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