

University President's Budgeting & Resource Allocation Checklist

Decision Lens: Ask Before Approving Any Allocation

Does this decision advance:

- ☐ Mission Alignment
- ☐ Institutional Sustainability
- ☐ Student Success
- ☐ Have we weighed both short-term pressures and long-term impacts?

Does this decision reflect the legal and ethical fiduciary duties of:

- ☐ Care
- ☐ Loyalty
- ☐ Obedience

Principles & Process

- ☐ Stakeholders with expertise were consulted appropriately (advisory vs. decision-making roles clarified).
- ☐ Budget is reviewed regularly and adjusted for enrollment/revenue shifts.

Decisions are:

- ☐ Data-driven, not perception-based.

Criteria and rationale are:

- ☐ Defined
- ☐ Shared
- ☐ Documented

Fairness & Fiduciary Responsibility

- ☐ Allocation is fair, not equal (mission priorities  across-the-board cuts).
- ☐ Resources directed to programs with strongest impact (recruitment, retention, reputation).
- ☐ “Loss leaders” supported only if mission-critical.
- ☐ Departmental wants balanced against institutional needs.

People & Communication

- ☐ Student programs and services are protected first.
- ☐ Faculty/staff disappointment is managed with empathy and honesty.
- ☐ Financial context is communicated early and often.
- ☐ Feedback opportunities were provided before decisions were finalized.
- ☐ Conflict was acknowledged and channeled constructively, not suppressed.

Leadership Through Complexity

- ☐ I am prepared to explain why this decision is fair and necessary.
- ☐ I have anticipated likely criticisms and prepared honest responses.
- ☐ I have modeled candor, courage, and resilience in this process.
- ☐ The decision reinforces the institution’s future.

 **Pro Tip for Presidents: Keep this checklist visible during budget meetings. Checking these boxes ensures that allocation decisions are not only fiscally sound but also mission-centered, transparent, and principled.**