So good morning. I'm so happy to see so many faces that could join us today for part three of the budget, 101 series. Hopefully some of you were able to attend part one, which happened back in February with Jake Julia. And then last March, we had our very own Lori Gordon presenting on us. If you are unable to attend any of those sessions, we actually have them all recorded. We also have them transcribed and translated. So you can go back and view any that you didn't-- that you weren't able to see, or you can also go revisit any of the contact. So I will drop the link right now into the chat for you all to have for future reference. Our hope is kind of we structured these that the series works as a little bit of a building block, if you will. So the first when we had Jake come and speak, we were looking kind of for a big picture of higher-Ed budgeting and also a little bit of context around Northwestern specifically. And then with Lori, we were looking for kind of a drill down of terminology and collectively what our student affairs budget looked like. And then today we are bringing Julie in to talk a little bit about stewardship. She'll talk a little bit about what does that mean? So we throw that term around quite a bit, but what does it actually mean? And how can we all work together towards our budgeting and how that aligns with our priorities. She'll also talk a little bit about transparency and accountability and what that looks like from a budget perspective. You might hear a little bit from our budget and finance team. So we have Lori here today and David. So we might ask them to chime in in terms of support or kind of any specifics that we might need clarity on. And also know that we will have a Q and A at the end of this session.

So it's an open forum. It's a dialogue. But throughout the space, we've built in plenty of time for you all to ask questions in the moment. So as we're on a topic, if something crosses your mind, feel free to raise your hand or chat. We really want it to be as interactive as possible so you can ask those questions throughout the presentation. And then, as I said, we will have a time allocated at the conclusion as well. So that's all I have for you. I'm going to turn it over to Julie right now who will walk us through kind of a land acknowledgement and then she will get going on the content. So thanks again for joining us.

Right. And thanks, Regan. And thanks to Norris Tech again for always being so phenomenal behind the scenes and helping us advance things. So [inaudible] if you want to advance the land acknowledgement slide, that would be great. Perfect. So as we do and as we should as a place minded organization and in line with our commitment to social justice, we will start with a land acknowledgement. A land acknowledgement is a formal statement that recognizes and respects the indigenous peoples as traditional stewards of this land and the enduring relationship that exists between indigenous peoples and their traditional territories. And so in the spirit of healing and owning our history, we recognize that Northwestern is hosted on the traditional homelands of the people of the council of the three fires, the Ojibwe, the Potawatomi and the Odawa as well as the Menominee, Miami and Ho-Chunk nations. And it was the site of trade and travel for significant numbers of other tribal nations in the area and continues to this day. I think it's also important to note that as we start talking about stewardship, stewardship is a fundamental component of the culture of Native American and indigenous peoples in a number of different ways. And so on some level, by grounding ourselves in a land acknowledgement, we are honoring being taught about stewardship in an important and an intentional and a place minded manner. So I offer that up to you as we begin our time together today. So, Anthony, if you could advance it.
So as you heard Regan talk about today, we're here to talk about stewardship. You've got the nuts and bolts. You have the big picture about the university [inaudible] of higher-Ed budgeting. You got some really great information from Lori Gordon about the division's budget and all the different buckets that we have and the funding sources and some of the pressures. But now we want to talk about how do we actually build this thing from a frame of stewardship. We've got to root ourselves, though, in what stewardship is. We need to talk about priorities and processes. We also need to own our role in it. Because stewardship doesn't just sit with the vice president. It doesn't just sit with the student affairs leadership team. Everybody in the division has a role when it comes to stewardship. And then while we have some space at the end for questions and discussion, as Regan said, we can certainly move in and out of questions and I'll take pauses along the way. The other thing that I'll offer up is that I will be asking for engagement via the chat. And so anybody that has been in a presentation with me before knows I really like the back and forth a little bit here. Because I think we all can learn a lot from each other in the process and I can learn a lot from you. So if you could advance. Thank you.

So let's start here. Again, you heard Regan say we throw the term stewardship around a lot. We say it like we know what it means. It may have different meanings to us based on our backgrounds, based on our histories, our cultures, the work that we do. But what I'd love to do is to-- first moment of engagement for the group, pop up a chat and take a minute and give me a word that you think best describes stewardship to you or what you think it means. Taking care of something. Okay. Care, responsibility, duty of care, responsibility, alignment of responsibility to values. Okay. Safe keeping. [inaudible], that's interesting, safekeeping, yeah. Gratitude, accountability. Okay. Care for someone or something. Ownership and aligning decisions with the values and priorities. Yeah, I see a lot of responsibility. I see a lot of care. I see a lot of ownership. Julie, thanks for offering, caring for something that's not your own, right? And so I'll offer up the three following-- oh, guidance. Jill, that's interesting. Thank you. So Anthony, if we can advance that'd be great.

Here's three pieces that sort of create kind of a framework for stewardship, right? And you heard others caring for something, not your own. Julie, your statement there is connecting with me. Because when I look at the general definition of stewardship, effective management and safeguarding of another's resources. And you can see what we mean by resources there, right? Time, money, technology, people, property, sometimes people put information in there that really if there's a level of responsibility and care that has to go into not just managing, planning, allocating, safeguarding resources. If we drill down to financial pieces, well, then you have all of those things connected to money. Right? So the financial allocations that we get. The dollars that our students entrust us with in our auxiliary or self supporting areas. The dollars that our donors trust us with when they make gifts to us to put programs and events and resources and services together on behalf of our students. So there's a huge level. And Michael, you just put it in the chat of trust that's involved with stewardship. And so I think it's important that we hear these value words linked to something that is so important.

And then I also want to point out we have a divisional value of stewardship in the way that we've defined it for ourselves is that we strive to be thoughtful and responsible with natural and institutional resources, facilities and spaces. And so all of these things come together when I think of stewardship. And I hear throughout at themes that you all are naming in the chat here, planning, responsibility. And so if we can advance the slide. There are five principles that are connected to stewardship. And
Here's some more themes you'll see that you all have named in the chat. So it's rooted in priorities and values. You cannot effectively steward something, whether it be money, whether it be human resources, whether it be environmental resources, if you aren't facing that in our priorities and values of an organization or you even as an individual. We often will say when it comes to finances, budgets are moral documents. Well, when you think about a moral document, what's it rooted in? Values and priorities, right? So, oh, great question, Heather. [inaudible] capture that one. Heather's asking, how do you balance previous donor wishes restrictions with the evolving nature of our priorities, values and needs?

So I'm going to pin that one, we'll stick it over in the list. And Heather, when I get to the end of this section, we'll answer that one for you, okay? And the quick answer to that is it's complicated. But we do have some techniques that we can use. The second piece here is stewardship is comprehensive and it's also based on the best available information while acknowledging future uncertainties. So you can't lock yourself into a process, right? Or to an approach because we know things continue to move and evolve around us, look at Heather's question, it's rooted in that principle. We're making decisions based on the best available information that we have. It's a positive intent, right? When we're rooting it in our values and our priorities. But we have to acknowledge that things may need to shift. So building flexibility into our approach has to happen for us to be effective at stewardship. Planning and decision making are transparent and responsive to input. So if we're going to acknowledge future uncertainties and make decisions based on the best available information, we have to have input. We have to hear the folks that we are serving. We have to hear the folks that are part of our organization. We have to understand the things outside of our organization, change and flux. And that we need to have mechanisms in place to hear what those are, right? So whether that be meeting regularly with student leaders, whether that be utilizing our existing connections to whether it's meetings that we have or town halls that we have or sessions like this or other training and professional development approaches or surveys and feedback that we get from our staff and our students. Those are all elements of input. The transparency is how do we do this? How are we reporting back to folks on how we're making these decisions?

Planning our principles of stewardship. It has to incorporate monitoring and continuous learning, and it has to be, again, adapted to new information. Monitoring and continuous learning when it comes to fiscal stewardship is critically important. So you think about-- I'll get you some examples in a minute, but what does reporting look like? What does accountability look like? Right? And then you see number five, using accountability for outcomes. So if we know we want to do this and we know the dollars are going to go to this, how do we know the dollars are being spent to do that work to get to that outcome? So let's break this down for a second. The first piece here, I think this speaks a little bit to Heather's question. If we could advance. Really we'll focus on priorities and values. So it's advance again. And when you look at our student affairs vision and mission statement, these are the big picture pieces of our priorities and values, right? We want to be full partners in the student learning experience, there's student front and center. There's partnership front and center. Our mission when we educate students, engage the community, enrich our Northwestern experience. Those are really big picture components of our priorities and values. If you could advance again, please. The division values here, and I know this is a little small, but you all know these. We've reviewed them many times. You can see that we have integrity, social justice, innovation, collaboration and stewardship. There's that stewardship value that we talked about earlier. But when we think about our decision making, we need to go back to our values here. Are the
decisions that we're making— are the plans that we're putting in place for our finances aligned by these values? Are we rooting those decisions and integrity? Are we keeping social justice front of mind as our framework? Are we looking to innovation?

So are we just continually funding the same things over and over again? Are we trying to find ways that we're doing things differently or maybe more in alignment with what's happening and what the needs of our students may be? Are we collaborative? Are we funding things in multiple departments throughout the division that are redundant, or are we really looking at ways to connect those dots when it comes to looking at that value collaboration and even beyond the division? Right? In partnership with our donors, in partnership with other units, are there things that we're doing that let us utilize and steward those resources more effectively? And then there's stewardship. We need to think about stewardship as we steward the budget. I realize that sounds redundant, but in my head it makes a little bit of sense. And so, Heather, I'm going to go back over to your question, because we were talking about values, priorities here. How do you balance previous donor wishes and restrictions with the evolving nature of our priorities, values and needs? So there are a few things that we do, particularly more recently. Donors may have ideas about what it is that we need, right? And we tend to get donor interest in a number of different ways. Sometimes donors come to us and say, "I think this is a cool idea and I'd really like to see it happen." In that moment, if it is not maybe in alignment with our values and priorities or the needs of our students, we take the moment to meet with the donor and educate them in a respectful and curious way, "Talk to me about why it is that you feel this is important." For example, I will have a meeting with the donor coming up who really is interested in—and Garrett knows all about this, by the way. Our executive director Katz really is interested in funding something that allows Northwestern to benchmark our mental health services with other universities across the nation so that we can come up with best practices.

Now, we know we have professional associations who already do that. The donor doesn't know that. So we need to sit down and walk through that and then talk about, "Okay, what was your hope, the outcome of this?" Because that's really when we can get to something maybe that better aligns or maybe is something that is anticipating a need for our students. And we're aligning the donor ask or the donor dollars with something that we truly need. Previous donors sometimes have interesting things written into their agreements. And so we have a great partnership with alumni relations and development. And that's another level of stewardship, by the way, staying connected to donors during the process so they know what we're doing is a way for us to educate them. And sometimes we sit down and we have sort of a reset conversation with donors to say, "We know the original intent of the gift was this. Here's what we are seeing." And so we've had a lot of success in helping pivot a donor request to better meet a student need. Because at the end of the day, our donors to the Division of student affairs want to help our students. And if we can start from there, we can really evolve some things.

I'll pause for a second, too. And I don't know if either Leslie Ann or Lori might want to offer some things as well. And if not, that's okay. No pressure.

Leslie Ann

I don't have anything to add. Hi, everyone.

Lori Gordon

Yeah. I was just waiting the five seconds or so because sometimes I know with me it takes a while to unmute. Okay.
No. Everything is really well defined.

Okay. Thanks, Lori. Thanks, Leslie. So the other thing Heather, that we often do is we make sure that our priorities are aligned with the university priorities. Because then the donors and our trustees and folks are hearing things that are truly aligned and they can see how student affairs is bringing to life the priorities of the university. So if we could advance the slide. This is a-- backup. There you go. This is a priority's crosswalk. And so on the left you see the university priorities that really more tightly align to student affairs. And those are priorities that both were this year and the previous year. Because it's not just a one year and done. Priorities carry through. As you can see, things about maintaining the health and safety of our community, supporting the student experience, our university commitment to social justice, restoring support for infrastructure, and then strengthening the faculty and staff compensation pool. And undergirding that really is just bolstering support for our faculty and staff, right? And in the middle you can see the division priorities that we've been basing our decisions on, really from FY19 through this current fiscal year, which is why now we're rolling into FY22. And it really does overlap a little with this upcoming fiscal year because there's never a hard stop and a hard start. There's all these overlapping pieces. This is an older slide, by the way. So I'm not sure what happened here, but I'll walk you through it. On the right hand it had populated all the strategic themes. And so you know from our division, we have strategic themes. And so for the first box, what is populated is student wellness. And you can see how that aligns with the priority and back over to health and safety of our community. We also had in their social justice, student learning and enriching our Northwestern community. Because when you think about to your live on requirement, everything that's involved in student wellness, you can see how these mesh together.

The second one in that strategic theme box had organizational health, our strategic theme of org health, social justice, enriching our community and student learning again. And so you can see our social justice collectively impacting the campus climate ties back to social justice, commitments for the university and so on through that section. The third one for restoring support and basic infrastructure that relates to our priority about this comprehensive seven year strategy for facilities and spaces. And we think that connects nicely to student wellness and enriching the community. And then the last one in that final box had org health and student wellness connected to organizational health. Because we know, yes, when we pay attention and really focus in on our staff and their experiences, it benefits the staff. It also benefits our students in really tangible ways. And so those aren't all the themes, but that's a lot of the themes that we put together. And so we want to make sure that any planning we do and any resource allocation is aligning in this way. It lets us tell the story about what we do in a much more effective way.

So if we can advance the slide. Great. So one of the other principles you saw was around transparency and there are a number of ways that the division holds ourselves to account with transparency. And so if we could advance. So we have monthly reporting of our budgets for leaders in Tableau. And so SALT leaders get a roll every month where their expenses are and where the revenue lines are so that they can really track and monitor, along with their financial administration teams and their leadership teams in different units where we are with monthly reporting. And in Lori's presentation, you saw some of those screen shots that are really high level. Know that those get drilled down and then those are also interactive so that if there's a line item that a leader sees, they can hover over it and click on it and they can really get the breakdown behind it. It's far more powerful than the reports that were coming out of
In alignment with that, we do monthly budget reporting, roll ups for review for the VP. We've been doing these 101 series with you. And then just to process outline an overview Lori went through with you some of it. If we could advance the slide. I'll go through it with you as well. So the fiscal planning cycle here, you can see this is the big picture cycle. So there's a strategy prep and meeting. There's resource planning. You see the arrow, we are here. And so things are happening behind the scenes. I'll give you more detail in just a moment. Then we roll into performance, excellence and compensation, which is really sort of happening hand in glove with budget prep for the next fiscal year. Then we go into our current fiscal year and close and then we roll into the new budget and then we start it all over again, right? That strategy prep is what's rooted in our priorities and values, right? And that's where-- here in just a moment I'll show you where we gather input from the division. So if we could advance, that'd be great. So here's the budget prep part. And you can see how it aligns up with all those principles we talked about. So in November, the division is sent a letter from the provost, the senior VP of administration and finance. So they both co-sign a letter to all leaders in the university. They also include our budget lead. So Lori would have gotten this as well. And it's posted on the website. So from a transparency perspective, there it is. And you can see here's what the process starts. Here's kicking it off. Here are the priorities you look at and here's what we expect is a deliverable from you.

So for student affairs in December and January, we then take that and based on those priorities, which I just went through with you, we build out a strategy document. Everything in that document is tied back to the strategic plan, which you all know, which is open and transparent and available. The little purple stars that you see at the end of some of these lines. This is also where we pull in student affairs leadership team who in turn often pulls in their direct reports to help think through what are some of the things that we know we need to make sure we're paying attention to in the next two to three years. And it's important to note that window has changed every year. And I'll get into that more a little later when we start talking about caveats in context. So late January, early February, we're developing this. And oftentimes in late January, early February, that's when I go into-- well, this time a zoom room with the president, the VPs, the provost, other key leaders. And we walk through what that strategy looks like, right? Over the next two to three years. And then in March and April is when we start doing resource planning with units. So based on that strategy, we're working with SALT leads and coming up with what are the things you think you need to make this happen, right? And so the student affairs business and finance team is meeting with SALT leads to make sure, "Okay, what is it you need?" They then pull that together behind the scenes. And in early May, we get-- hopefully in early May. Right Lori. We will get our preliminary management budget from the Budget Office. So based on the things that we know, based on the strategy that we have, based on some of the big picture things that we need, the Budget Office says we think this is the budget you need to accomplish all of that. We then go back-- there's also a lot of back and forth that happens during this time. So that's a whole other flowchart in and of itself.
We then go back, folks are meeting with Sheila and David and Lori and others to really go through the departmental budget meeting so that we can figure things out. If there's been realignment within the department or in this most recent case within the division, we're doing some reallocations to make sure that those units are in the right homes and that they are appropriately resourced based on what we've been granted. And then in July, we take all of that after it's been reviewed and vetted and all the things and we put that into NU plans. Which is a fun system that thank God no one gives me access to because I would probably freak out. But Lori and Sheila and David know how to make it sing. And so all of our information goes into NU plans. And so in mid to late August, though, that information is reviewed and questions are asked and there's more back and forth. And then is when you're able to view that. Folks that have access to NU financials can see what those budgets have been set up for. So how much do you have for certain things? Right? And then September one is when our next fiscal year officially goes live. So on a lot of campuses, that's when it starts. Right. So yep, your live this is it. On our campus though we have a little bit of time, that if we've seen things once it goes live that aren't right, we have a chance to go back a [inaudible] budget office to correct those. So that is a high level overview. Lori, I do not know if there's anything that you want to add to that or David in the space.

Lori Gordon

Thanks, Julie. No, I think this is a nice overview. One common question when we do go live in the new fiscal year is often the different departments ask about the status of their carry forward balances. So it takes central through the better part of early October to actually close to previous fiscal year. Then they generally rule those. Remember the carry forward balances or what we speak of as our reserves. They generally rule them over. So they might not really be seen on GR reports until period two or maybe even period three. So that's something that lags behind the process a little bit, but it's controlled by central administration.

Julie Payne Kirchmeier

That's a great point. Lori, thank you. Thanks for offering that in. All right. So we've got a question and it sort of marries with a question we've received before the presentation started. And it really talks about connected to transparency. How have we been looking at financial resources and allocating them to wellness areas outside of CAPS over the past one to two years? And how that aligns with our divisional and university priorities. So I think that's a really important question. There was another question that talked about staffing needs in that area. Same piece. The shorter answer to that is in any strategy document that we've put together, we continue to reinforce that wellness is not just a CAPS issue. In fact, what we need to be doing is expanding and growing the resources around those other areas so that everything isn't just resting on the shoulder of CAPS. So, for example, we do have an overall fundraising strategy that connects over to this. And so oftentimes we are fundraising for some of these needs. And so there are gifts dollars that are allocated to those spaces. We look to areas like-- let me get this right in my head, Accessible NU. I know that we have been trying to expand the support in those areas, too, because there's an element-- not exclusively, but an element of wellness associated with the work that Accessible NU does. We've also been doing everything we can to protect those lines so that in times of fiscal constraint, we're not having to go back in and tap them. And then we just continue to advocate in a number of areas.

And as we come out of this COVID environment, our hope is that by taking the staffing dollars-- because what we did this year, in case you don't know, is we did roll up staffing centrally so that it's not embedded in unit budgets just for this year. Because we knew we were going to have to do a lot of pivoting and we didn't know what was happening really until it happened. You all know how COVID has evolved
over time and how we've been responding in that space. So I think by doing that and by getting it back down into the areas, there's a little more flexibility that some different departmental division leads will have. I do share, though, that one of the things we know we need to do is as we look at that overall foster student wellness strategic theme, how are we in this next iteration of the strategic plan, really looking at wellness holistically? And really thinking about what's called a public health model for folks who may not know, is that Angela and her team do a great job around the eight dimensions of wellness. Well, CAPS doesn't just deal with the eight dimensions of wellness, right? We've got a whole host of things that are in those spaces. And a lot of that really helps our students not have to rely so heavily on more reactive or crisis services. And CAPS does do different things other than those spaces. But right now, if you're short staffed and there's a high level of demand, oftentimes we end up defaulting to crisis spaces. So those are some of the ways. I think that I'd be more than happy to engage individually with folks offline if there are specific questions. So hopefully that helps them. But just know that that's a constant advocacy piece on my part in key areas. And I think you heard Jake even say that in the first presentation if you were able to attend that.

So if we can shift—advance the slide for me, please. We're going to move to accountability. So transparency is one piece and accountability is another. And so with accountability, this is something that I think our division does really well. In that we have taken this seriously. Our student affairs business and finance team has really built some infrastructure so that we are able to monitor things effectively and make sure that we are accountable for stewarding the resources that we are entrusted with. So if we could advance. So accountability goes anywhere from how are we describing what we expect from a stewardship perspective, particularly around finances in job descriptions. How are these showing up in performance excellence processes? Right? So if you have primary or secondary responsibility for financial resources, we want to know if you have a goal associated with that, did you meet that goal? Are there challenges that you're facing? Right? Again, the monthly reporting for leaders in Tableau, the monthly roll up reporting for the vice president. There are regular meetings that are set with SALT leads and different members of business and finance so that those teams can ask questions of each other and the leaders can maybe make some adjustments or changes based on the evolving needs that they're seeing happen in the moment. And it also gives another good measure. So if you see something out of alignment, you've got a colleague that has more of an expertise in this area from business and finance really connected to you and helping you navigate some things.

We also do a quarterly roll up of the full division budgets. And that aligns with some projections and reporting that we have to do for central budgeting. So the student affairs business and finance team is doing quarterly projections, which I think Lori talked about a little bit on in her last session. And so that way we know and the university knows that we're utilizing our resources appropriately. And then we make sure that those connections with priorities are done during budget allocation. So all of those things roll up into an accountability space. Wondering if anybody from business and finance would like to offer up a different option there or something to that space. So open the floor.

Lori Gordon

No, Julie, I think, again, this is a nice overview. I did want to take an opportunity to just give a shout out to all of the financial administrators. Because it really starts with a lot of the hard work that they do day to day with transactions and getting them into the system. Big shout out to the reservices team as well. Holly Adler, David, Dan, Gigi,
they work a lot behind the scenes on food service, as well as just the general purchasing for reservices, which is really substantial. There is a lot of goods and services that they’re purchasing to keep the systems in the buildings safe for students. So it’s really-- everyone has been, as Julie said, great stewards and has been accountable. I think the challenge this year really has been, again, trying to manage the compensation budgets. There’s still a lot of questions around those. But I think there’ll be some improvement with that going into FY22.

**Julie Payne Kirchmeier**

S2 33:12

That is the advocacy point. Thank you, Lori. And thanks for naming those folks. I will say this. There’s two things. One, everyone Lori just named, the financial administrators team, the leaders of the different departments, right? It’s not all one person again. But I’m also going to name in this moment, Lori, you and your leadership, you’ve helped build an infrastructure and these different accountability measures and these workflows and other things into a comprehensive approach that really has set us up beautifully long term. And I know that many of you on this call saw the announcement. And were so excited and proud of you, Lori, for your next thing with Duke University. And we also know that because of the work that you’ve done, we’re going to be okay. And so thank you for your leadership and just the work that you have done, not just with your teams, but across the division so that we are better stewards as a unit and not just relying on one or two people. So thank you. And it’s weird I’m saying this, and I can’t see her [laughter].

**Lori Gordon**

S4 34:25

Oh, thank you, Julie. And thank you. Everyone has been just wonderful to work with. Everyone over the past four and a half years.

**Julie Payne Kirchmeier**

S2 34:33

There she is. Hey, Lori [laughter]. So the next section I want to roll into really quickly is there are challenges, obviously, to stewardship. And I think we know a lot of them. But before we move forward, would love to engage again. And I also want to pause for a minute. All of the love in the chat, Lori. I hope you're scrolling through that and seeing it. Because it’s really important that you know. But let's move over to the chat again really quickly. And when you think about what are some of the-- oh, go back. Thank you. What are some of the challenges that you see associated with being effective stewards? So anything that you want to put into that space. Things that could complicate us or make it complicated for us to be effective stewards. Competing priorities. Hi, Keith. Yep. Competing priorities is a really difficult one. Because their priorities for a reason, right? Other things that you think are challenges. Unforeseen problems, a sense of urgency. But just not allowed to carry over. Sam, that's a really good point. Yep. A pandemic, yes [laughter]. A pandemic will mess with your stewardship capabilities significantly. That is true. Hierarchy, yep. Budgetary constraints, unforeseen revenue impacts, constraints related to compliance, yeah. Constrains at a number of different ways, one of which we often hear of called unfunded mandates like, "You will do this, but we’re not going to give you dollars to do it." It's like, "Okay. That will be fun." Not enough to go around, unexpected tender costs. Yep. Kelly, that is fair. White supremacy, yep. And there's never enough-- required programming compliance, yep.

S2 36:26

So there are a lot of-- your naming a lot of the things that we navigate. If we want to advance that’d be great. Here are some of the things at a divisional level that we often see that complicate things. And they roll up to some of the themes that you’re identifying here. So Anthony if you can advance the slide. There we go. So one of the things that I think somebody mentioned, I can’t remember who it was, it talked about this constant sense of urgency. Maybe, Brent, it was you. About thinking only short or long term. But then if you go look at number seven, conflating priority, urgency,
emergency and crisis, right? If we're only thinking short term and we don't have a clear understanding of what a priority is versus something that's a crisis, a pandemic let's say, we really can get lost in how we are stewarding dollars because everything becomes a priority. Lack of direction or process. So someone mentioned the communication or clarification, [inaudible] but we'll just put loss of informed staff without replacements. They know what's going on. And so you end up having to catch somebody else up. And if you can't replace them right away because of constraints, then you end up lagging. And it complicates effective stewardship. I think Keith Garcia came right out of the gate with priorities and or values that come in conflict with one another or tensions or he said, competing priorities. I think we could sit here all day and name what those might be, right? So if we need to be effective stewards, but we also are really focusing in on our racial equity and social justice components then--and we don't have enough money to go around. Well, now how are we navigating all those spaces together? I see some questions about lack of promotion from within leading to over usage of funds for onboarding. Yeah, there's a reason why we talk about retention being really important. And about how we need to balance recruitment and promotion, right?

So it actually is combining, Christine, I think some of what you say with some of what Jeff is saying, right? We can't always hire from outside because we will lose some of that knowledge base and that expertise. But we also can't consistently promote from inside or we lose some of the innovation components or the new things that could come in or other experts that could come and help us think differently. So that balance is really challenging to strike. And it can be incredibly frustrating. So I will say it right now, very frustrating. I think someone else also mentioned that things change and we have priorities and needs that shift once resources have been allocated. And so here we have this plan moving forward and we think we've got everything allocated in the right spot. And then a major issue hits. Or again, I'm just going to--the pandemic that hits. Or we have a loss of a number of staff members in one area because they've gone on to bigger and greater things in their own career. They've made different life choices for themselves. And so all of those things can upend the best laid plans. And it makes it challenging to steward those. Changing leadership at key senior levels at the university and even internal to the division, I think always connects there. Oh, Sam, that's a really good one. Priority is not always informed by best practices or we often hear proven practices, right? We're going to use the assessment accountability language. So here's what we think the priorities should be. But maybe they're not. Maybe we're just not coming at it from an informed space. And so are we really being effective stewards in that moment? So thanks for sharing that in the chat here. I must scroll back up through and see if we missed anything. Expectations versus capacity. Yeah. Particularly when we're down staff members and when the sense of urgency is high, right?

The required programming compliance came out again from a few people here. The hierarchy all connected to white supremacy. I'll connect that to the culture at Northwestern of not just excellence, but this expectation of perfection, right? How can you be an effective steward if you are facing in a system of punishments and rewards a lot of punishments for not doing it right? Right? Daphne, procurement, not understanding purchasing needs for the department. It makes our job challenging. I'm going to bet there are a number of people in this session who have had to have a conversation with procurement about why something is important. We can talk about Grubhub gift cards at the time of the pandemic connected to student programming all the time as a major one of those, right? It lets us educate, but at the same time, it makes it really cumbersome for us to be effective stewards. Keith's put in innovation
is often accompanied by failures, lessons learned. There's little room for that. Right. That's the whole concept of, I never lose, I either win or I learn, right? They forget to learn part [laughter]. And so how do we then--? If we look at the areas that we can control, how do we help create a culture internally that allows for that type of innovation to happen? Right? And that we don't really just hammer people with you failed on that and this whole shaming and punishment approach, right? Yep, Irene. Favoritism equals less equity across the board, yep. That makes it incredibly difficult to be effective stewards and not just the financial resources in that space.

So if we move to the caveats and context. So here's some of the pieces that I think are important to know, that as we're trying to be effective stewards have happened over the past few years. And some folks who are newer here may not know this. I think we all know that we've experienced budget reductions starting back with the sort of midyear adjustments we had to do in FY18 and then to 19 and 20 and then COVID. So, I mean, it has been a really tumultuous. It's been incredibly difficult in how we've managed that. And it's directly impacted our ability to be effective stewards and to make our priorities come to life, right? We had a situation for a couple of years in that time period too where our merit increase had to be covered by student affairs. So in the I think it was 19, Lori, I'll get it wrong. It was either 18, 19 or 19, 20 in planning. We had folks lean-- we said, "Okay, as a university, we're going to go ahead and put forward a certain percentage of a merit pool," right? So that if we wanted to adjust folks compensation based on merit, we could. In years before that, the university has supplemented that and said, "Okay, if you have a 2% merit pool, here's your 2% from Central to make that work." For two years, we had to really cover that on our own. The third one and Leslie Anne's making a comment about it-- thank you, Lori for the 19 and 20. The third thing is that we've had inconsistent processes year over year. I've been here since 2012, and every year the process has changed. One of the things that Leslie Anne talked to is about these late notices regarding budget reduction, part of a process where you think you can rely on, okay, we've gone through the process, the resource planning, we've met with different folks, we put it in any plans based on the management budget gets blown out of the water when someone says, "Oh, yeah. And by the way, now you have to reduce your non-competition budget by 8% plus an additional million dollars."

Sends us scrambling to try and come up with ways to make sure our priorities are being met. And Daphne, I think-- I don't know if this is for Lori or that this-- I think that this must be for Leslie Anne [laughter]. Yeah. Christina, remember all the end of the world movies that came out in 2012? "Yes, I do. And I don't watch them anymore." The fourth one is changing leadership, right? These processes have changed because so many people have come in and they have a different idea about how we need to do this work and how we need to align our priorities and what the university priorities would be. So from a former senior VP, Jean Sunshine to Nim Chinniah to Craig Johnson. And then if we go to the Budget Office and look at changing leadership there and the provost area and changing leadership there, these priorities keep shifting, right? And it makes it really challenging to come up with a consistent and a transparent process. COVID-19, I think we say enough said with that one. I will also say, though, and add racial equity and social justice in the priority that has always been there, but the sense of urgency and the dedication and commitment that we have made, not just as a university, but as a division is part of all-- is now a huge priority and we need to make sure that we are looking at everything we're doing through that lens. So for caveats in context. I think it's important that you know all of this and that these are the things that we've been navigating both with you and also advocating for you behind the scenes so that we can make all of this work. So I think--
we got a question behind the scenes. Thanks for the person who asked it. If I feel comfortable answering, which, of course I'll answer, can we speak to how fraternity and sorority housing and the evolving nature of that impacts the budget?

So our fraternity sorority housing process here is interesting. We've got different lease arrangements. Some more directly impact the in part university housing budget than others. All of them are tied over, though, to how we help fund the fraternity and sorority life team and campus life in some way. So when numbers go down for that organization in housing, that's less resources for the housing groups to come together and both put into the facilities what they need, which can impact housing and residence life. Because at the end of the day, if a fraternity or a sorority moves out, those buildings go back over to housing a residence life, right? If the housing occupancy numbers go down, it can impact in one of the lease arrangements how many dollars are paid over to reservices and or fraternities and sorority life. So as that membership fluctuates, it's on us to really figure out how we continue to support in particular that unit and then the units that also work to help support fraternity and sorority housing. I can say that with these changes, there's a group of folks that I know, Travis and Keith and Jasmine and Brent and Kelly and Carlos and Jeremy, a whole host of folks are really thinking through what the impact of Abolish Greek Life is having, not just on the student experience part of a fraternity and sorority life, but also on all of these other components that are connected to that. So, Heather, it's a little high level. If you want to get into more specifics I'm happy to have a conversation with you and share with you what I can.

So with that, I also just want to name that-- obviously, at the beginning, stewardship is your role. So if we could advance. I want to just-- and we'll just do the first scenario here. Scenario one. We just thought we'd do a quick scenario with you all. Like if you're the director of student affairs unit, your department's facing a budget cut that mid-year due to some overruns in key areas. Could be for whatever reason. You're looking at ways to try and recover that. And you've asked the leadership team to identify ways that you can preserve those resources. After you vet it, you're still stuck. And so one of your team members says, "Hey, why don't we cut back on food at events just with staff?" The second person says, "Nope, that's too important for organizational health." A third team member pointed out that removing refreshments at meetings instead of full meet meals and food could be a way to preserve resources, but not make it go away. And you need to make a decision. So the question to you is, what do you do? And if we advance the slide, I have choices for you that you can populate in the chat. So if you're the director, what do you do? Do you keep the food? You'll find something else to cut. Do you eliminate it because you think the staff can sacrifice so that the students are the focus? Do you try and find an alternative? Do you use your reserves or fund balance or make a request to cover that? Do you throw up your hands and shake your fist at the sky or do you none of the above? And so if you want to put your letter answer in the chat, just so folks can see. And this is me not knowing how to use polling, by the way, but I have a goal to learn how to use that [laughter].

All the empty shelves in the stores. Yes, Leslie Anne. So what would you do? C. B and C, okay [laughter]. Brianna, that's great [laughter]. Yeah. I see a lot of C or B if maybe the C has already happened like you tried. First is C. B and C. Okay. C and F. Okay. Christine, I think that's interesting. Maybe there's something that's not even on this list. B, B and C. So I think what we're demonstrating here-- is that an alternative to food? Interesting, Frank. So I think what we're seeing here is we're all embracing values, both of integrity, because we know we need to make a decision on
stewardship, but also being a little bit innovative. And maybe we’re going off book. Which I think is great. It lets you explore things. We’re also, I think, embracing, kind of pushing back against one of those challenges to stewardship, which is all or nothing thinking, right? You have to do A or B when oftentimes something can happen in the middle there, which might yield a different or better result if you give yourself the space and grace to explore it. And that’s hard to do in spaces when we move really quickly. Yeah. Travis, I like that letter C is really widening the options, right? Brianna, though, I am going to acknowledge your moment. I put E in there for a reason because there have been many moments I sit in this office and something comes across that we have to do. And I do throw my hands up and shake my fists guy for a minute, then breathe and then get into how do we find the solution. Yes [laughter]. Sometimes you just need to honor that rage. Yes. Yes, you do. I agree.

Because this is frustrating sometimes. Because again, everything that we put into these budgets, everything that we do and we sit here and we align our financial and our human resources, I don’t think there’s anything we have outlined in our documents that’s not reasonable. That’s not a priority for us. We know what our students need. We know what our staff needs. But again, one of those challenges of nowhere near enough to go around. So you end up having to prioritize the priorities and then you get external factors coming in and it just becomes a constant process. So with that, I know we’re at 10. We’ve been taking questions along the way, which is great. So if we want to close the presentation, we can maybe take one or two in this space and then we’ll end with some announcements. So thank you. Well, you can remove me from the spotlight, Hue [laughter]. Questions folks may have. And Daphne, I see your answer in there, too. Another creative solution, right? How do we just reduce it? It’s great. All right. I’m not seeing a lot of questions here, and that’s okay. Again, I will offer up that we are absolutely-- I’m open to questions offline. If folks want to have that kind of conversation or shoot me some questions via email. Oh, somebody did populate a question. What has been the most challenging part of budgeting during COVID? The complete uncertainty and inability to truly plan on what is coming. We just didn’t know. Yep. Lori, great change in direction from university leadership. Pivot to pivot, to pivot, to pivot. I just can’t get Ross from friends out of my head and that couch, because that’s really what it feels like we’ve been doing.

Yeah, Christina, the significant compensation be available, this performance, excellent cycle. Think of the conversations from the president. What the commitment has been is a 3% merit pool. And so that’s what we will end up working with. We keep hearing that it should be funded centrally, but of course, we don’t know until we actually get it. As you see, Lori, kind of we don’t know. So. Yeah, Sam, that’s a really great question. Do most units have budgets that include organizational health? I think it may show up in some ways. But I don’t know that it’s here’s a line item dedicated to organizational health. I think what we also have is there are things in professional development, staff development that go toward organizational health, staff engagement. We try and make sure that we have funding available to do those types of things so that staff can be a community with each other. They can continue to invest in their own development. Lori put in the chat divisionally as well as departmentally, so. Okay. So with that, just we’ll close out with some announcements here. But thanks again for spending time with us today. Again, the president-- Deborah, you’d ask the question, will it be emailed? And Regan’s answered, we’ll post it along with the recording. So if there are any slides we didn’t get to, you can see those for sure. We’ll also translate this into Spanish and transcribe it so that we have access in the spaces. Don’t forget that next week we have our spring gathering. So make sure that you’re signed up for that. We do have the optimal mix and mingle,
Plan for promotions from the ground up versus the top down. I think we are talking about-- we're hiring in a director of HR. And we will certainly work with them to help create a strategy around that. We know that's a blind spot for us, that we don't really have a formalized approach to that and one that is transparent. So know that that's one of the priorities we'll be working on. And then finally, lunch with the VP. We have one for May 26th, I believe at 11:00. So if folks would like to attend that, please make sure to RSVP for that. And then just again, thanking Anthony and the Norris team behind the scenes for all of your support here. Thanks to all of our folks in student affairs business and finance. Lori, named them all so beautifully earlier for all the work that you do and continue to do in helping us navigate these spaces. I also want to thank Leslie Anne and Regan for a lot of the work. And then I want to name specifically Ronnie Toker. Ronnie, continually helps me show up as my best self. This is administrative professionals and I will say slash partners. Day and I am forever grateful for Ronnie in helping me really be prepared, keeps me grounded, keeps me levelheaded, and he does keep me laughing as well. So, Ronnie, thank you so much for all of that. Thanks so much to all of our administrative professionals and partners on this call today. And thank you all for your engagement. And have a phenomenal rest of your week.