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Date: June 26, 1987

To: Presidents

From: W. Ann Reynolds
Chancellor

W Ann Reynolds

Subject: Campus Budget Advisory Committee

In July 1986, the Board of Trustees adopted several priority topics for review during the year. One of the items involved "Student Representation on Campus Budget Committees". Concern had been expressed by the student leadership about the actual functioning of Campus Budget Advisory Committees (CBAC's) that are required by Board of Trustee policy.

As background to this issue, three specific events occurred:

- In September of 1984 the Board of Trustees established new student fee policies which incorporated several principles including:
 - a. Students should be active participants in the consideration of program and budget related issues.
 - b. Committees, which include students, faculty and any other appropriate constituency, shall exist at each of the campuses and at the system level to offer advice on budget policy, planning and resource allocation.
- In September of 1985 the Board of Trustees approved the statement of Collegiality with the CSU which "... recognizes the value of participation by the faculty in budgetary matters, particularly those directly affecting the areas for which the faculty has primary responsibility".
- In January of 1986 the Trustees received a report on structure and operation of CBAC's. The report showed that a wide variety of structure existed, but that all campuses appeared to be in compliance with the policy.

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Chair, Statewide Academic Senate
Chair, CSSA

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The work plan for addressing this issue stated that it would be referred to the System Budget Advisory Committee (SBAC) for review and recommendation. The SBAC, working with the Executive Council, Statewide Academic Senate and CSSA, developed the principles included in Attachment A entitled "The Role of Faculty and Students in Budgetary Matters".

By this memorandum, I am endorsing the attached principles for implementation on all campuses. Information on the functioning of CBAC's shall be maintained by each campus so that future reports to the Board of Trustees may be readily compiled as necessary. The information maintained shall include dates and agendas for meetings, attendees and a record of committee recommendations.

If there are any questions about these principles, please contact John Richards of Budget Planning and Administration, (ATSS) 8-635-5725.

WAR: tmm

Attachment

ROLE OF FACULTY AND STUDENTS IN BUDGETARY MATTERS

Principles

1. Access to Information

- a. Faculty, student, and other members of the University community are entitled to information which provides a meaningful summary of the institution's budgetary status and financial condition.
- b. Persons serving in a formal consultative role should have early access to relevant information regarding the public funds available to the institution and their use.
- c. The campus policies and procedures employed in the development of the campus budget should be clearly described and understood by those engaged in formal consultative roles.
- d. The campus policies and procedures employed in the allocation of campus resources should be clearly described and understood by those engaged in formal consultative roles.
- e. The groups engaged in formal consultation, and the procedures employed in the consultative process should be clearly described and understood by those engaged in the process.

2. Formal Consultation Process

- a. There will be a committee, or committees, advisory to the President, or designee(s) of the President. The committee(s) will include faculty and students selected through established campus governance procedures. The President or designee, may appoint additional members because of their special expertise or value to the committee.
- b. The role of the committee(s) in budget matters, including special considerations such as lottery funds, will be made known clearly through a written charge to the committee.
- c. Regular committee processes normally should be followed, including the preparation of timely agendas, advance distribution of discussion material, and maintenance of a written record of the committee's recommendations. Actions regarding recommendations will be communicated to the participants.
- d. The desirability of membership continuity in budget deliberations should be recognized by appropriate terms of service.