

June 8, 2021

Gregg Goldman
Vice Chancellor and Chief Financial Officer

Re: Council on Planning and Budget's Budget Model Working Group Assessment Report and Proposed Dashboards

Dear VC/CFO Goldman,

I am delighted to share two complementary reports by the Council on Planning and Budget (CPB) concerning the Bruin Budget Model (BBM), which were endorsed by the UCLA Academic Senate's Executive Board at its meeting on June 3, 2021. The Reports, written by CPB's *ad hoc* subcommittee, the Budget Model Working Group (BMWG), are titled *Bruin Budget Model Assessment Key Metrics* and *Recommendations for the Bruin Budget Model Oversight and Assessment Plan*. Please visit the CPB Reports web page to review these important new analyses, as well as CPB's previous reports on the BBM.

The *Bruin Budget Model Assessment Key Metrics* identifies a dozen key metrics thought to be particularly useful in monitoring the impact of the BBM. The *Recommendations for the Bruin Budget Model Oversight and Assessment Plan* uses these and other metrics to make recommendations for the construction of a broader set of dashboards to measure growth in revenue from non-traditional areas, use of the Provost's Central Investment Fund, the change from internal recharge Programs to central services, global and national rankings for UCLA, undergraduate education, graduate education, and research and creative activities.

As a model of shared governance, we thank you and your colleagues for your engagement and collegiality in this ongoing initiative to improve the efficacy, transparency, and assessment of the BBM. As part of this iterative process, we share the expectation that over time the dashboards described in the *Recommendations for the Bruin Budget Model Oversight and Assessment Plan* would move from only being accessed by people with a UCLA logon to become public-facing dashboards. It is expected that the Council on Planning and Budget (CPB) will prepare an annual report based on the dashboards. We strongly support administration's commitment to a robust annual evaluation.

Sincerely,



Shane White
Chair
UCLA Academic Senate

Cc: Michael Beck, Administrative Vice Chancellor
Gene Block, Chancellor
Emily Carter, Executive Vice Chancellor/Provost
April de Stefano, Executive Director, UCLA Academic Senate
Aimée Dorr, Budget Model Working Group Chair, UCLA Academic Senate
Elizabeth Feller, Principal Policy Analyst, UCLA Academic Senate
Yolanda Gorman, Senior Advisor to the Chancellor and Chief of Staff
Tim Groeling, Council on Planning and Budget Chair, UCLA Academic Senate
Jody Kreiman, Vice Chair/Chair Elect, UCLA Academic Senate
Michael Levine, Vice Chancellor, Academic Personnel
Michael Meranze, Immediate Past Chair, UCLA Academic Senate
Emily Rose, Assistant Provost and Chief of Staff
Jeff Roth, Associate Vice Chancellor, Academic Planning and Budget