

## **Discernment Guide for Mission-Driven Budget Management**

*The budget is a concrete expression of our mission. Budget managers face difficult decisions, maintaining a sustainable fiscal policy and balancing multiple goods during times of reallocation. This discernment guide is designed to help all employees, especially those directly responsible for budget management, to make and evaluate decisions in accordance with our Jesuit values. This tool is a starting point for generating honest conversations, transparent decisions, and inclusive evaluation of the budget. Members of the University Council for Jesuit Mission are available to facilitate this process for your team.*

### **Context: Naming the Reality**

- What are the financial realities we face as a university? As a department?
- How does the context of higher education shape our financial realities?
- How does the context of our San Francisco location shape these realities?
- Who can I ask for more information? Who are the stakeholders involved in my decisions around the budget?
- What are the short-term and long-term consequences of this budgeting decision? Are there any implications for mission?

### **Experience: Finding Freedom**

- What external factors limit my freedom?
- What are my hopes associated with the budget?
- What are my fears associated with the budget?
- What are the fears of my colleagues? How do they impact my decision?
- Am I willing to acknowledge difficult aspects of my decision, including tough tradeoffs and uncomfortable truths?
- Where have I experienced desolation (isolation, imbalance, disconnect) around the budget?
- Where have I experienced consolation (inner peace, alignment with my community, a sense of purpose) around the budget?

### **Reflection: Identifying Guiding Values**

- To whom am I accountable in my decision?
- Who is most vulnerable in the context of our financial realities?
- How can I express solidarity with the vulnerable in my decision?
- Can I imagine a reality in which the budget supported the flourishing of everyone in the community? What does that flourishing look like?
- When I reflect on the Jesuit mission of the university, what values emerge to guide my decision?
- How do these values challenge me? Console me?

- Are there competing goods to consider in this decision?
- What is the greatest good I can imagine? How might I align my will with the greatest good? What do I have to let go of? What do I have to hold onto?

**Action & Evaluation: Communicating & Listening to Colleagues**

- How will I communicate my decision to those who will be impacted by it?
- Have I communicated, at many points, to those most impacted by the decision so that it is not experienced as a sudden and distressing decision?
- With whom can I share my fears and hopes around the budget?
- What would indicate to me that I made a good decision?