UCI Division of Finance and Administration

Ronald S. Cortez
Chief Financial Officer and Vice Chancellor
Division of Finance and Administration
454 Aldrich Hall, Irvine, CA 92697-1025

March 18, 2019

BUDGET OFFICE STAFF

RE: Post-Financial Meeting Procedure

Based on our collective discussions, I am sharing my expectation for the process that will follow the Financial Meetings with Organization Unit, Schools, or Departments.

Within three business days of the meeting, Portfolio Managers will send the documents listed in the next paragraph to all of the following:

- Ron Cortez
- Brian Fahnestock
- Jim Pavelko
- Katherine Gallardo
- Nancy Im
- Romain Fravien
- Jonathan Saucedo

The documents, which should be in pdf format, can be emailed and must include:

1. A brief recap of Unit's strengths, weaknesses, red flags, and key issues that leadership may be interested in. Spend approximately 15-30 minutes to prepare this.
2. Unit Presentation slides: These are the presentations provided during our weekly meeting. Romain can assist you if you have questions.
3. Data Package: This is the data packet of information provided from the Budget Office to the Unit.
4. Unit's Budget Letter: The Unit's response to EVC/Provost Call Letter
5. Notes from the Q&A section of the Financial Budget meetings, including any information you have regarding expansion requests.

Thank you for your cooperation.

Sincerely,

Ronald S. Cortez, JD, MA
Chief Financial Officer and Vice Chancellor