|  |  |
| --- | --- |
| **Finance Member Profile** | |
| **Name** |  |
| **Campus Unit** |  |
| [**Divisional Finance Leader (DFL)**](http://cfo.berkeley.edu/divisional-finance-leaders#dfl) |  |
| **Budget Buddy *(e.g. mentor, peer, manager)*** |  |
| **Who develops and manages your unit’s budget process?** |  |
| **What is your role in your unit’s budget process?** |  |
| **What is your CalPlanning role?** | **Planner** |
| **CalRptg & HCPRptg** |
| **CalRptg Only** |

|  |  |
| --- | --- |
| [**My Entity Structure**](http://www.bai.berkeley.edu/BFS/BudgetGL/treeReports/UCBDTREE.HTM) **Start at your Org Level of responsibility and work up & down the tree** | |
| **Org Level** | **Entities** |
| **L2, Org** |  |
| **L3, Division** |  |
| **L4, Department** |  |
| **L5, Discussion Group** |  |
| **L6, SubUnit** |  |
| **L7, DeptID** |  |

|  |  |
| --- | --- |
| **Unit Profile** | |
| **Top 3 Unit Strategies or Goals** | 1. |
| 2. |
| 3. |

|  |  |
| --- | --- |
| **Key Accounts for your unit** | |
| **Top Revenue Sources** |  |
| **Top Expense Types** |  |

|  |  |
| --- | --- |
| **Key Funds Types *(any particular fund restrictions or fund flavors that you typically work with)*** |  |

|  |  |  |
| --- | --- | --- |
| **Unit Complexity** | | |
| **Components** | **Yes/No** | **If yes, describe** |
| **Capital Projects** | **Y / N** |  |
| **Centers & Programs** | **Y / N** |  |
| **Contracts & Grants** | **Y / N** |  |
| **Faculty** | **Y / N** |  |
| **Pooled Positions**  **(e.g. GSI/GSR, Lecturers)** | **Y / N** |  |
| **Recharge** | **Y / N** |  |
| **Represented Staff** | **Y / N** |  |