

A Budget is a Moral Document

[0:00] Thank you so much for listening. If you've been enjoying this podcast, will you do me a solid and leave me a review? Reviews are some of the best ways for the algorithm to know how to make this show visible to more folks. So whatever app you use to listen to podcasts, take a moment, would you? Open the app, head to the show page for the uplift, and scroll down to the review section.

Leaving a review will not only help more women to find the show, it will also help me know what you like and what you want more of. Thanks so much. A budget is a moral document. I've seen this quote attributed both to Brittany Packett Cunningham and MLK Jr. Honestly, I have no idea where the phrase originated, although the idea that how we spend reflects what we value is an idea I've heard my whole life.

In today's episode, I explore what this phrase means and what our lives could look like if we embrace this concept not just with our financial budgets, but with other aspects of our lives.

[1:06] Welcome to episode 33 of The Uplift. Hello, my name is Carol Chabries and I am obsessed with all things related to women leading in higher ed. We've all been through it, told we're too vocal or too mousy, too compassionate or too bossy. We all have had to find our way as we lead within a system that historically gives its accolades and promotions to straight white men. Meanwhile, women from all backgrounds are doing exceptional work, teaching, mentoring, facilitating, guiding and leading. And increasingly, we're finding and sharing ways to lead that allow us to integrate the demands of our rich varied lives so that we and those we love and those we lead can thrive. Women are leading higher ed at all levels with big hearts and big brains. I'm here to share our stories as well as practical advice for deepening and extending your own leadership practice. I'm so glad you're here listening to The Uplift.

[2:28] Okay, so is a budget a moral document? And what the heck does that mean? Anyway, I really don't know where this quote comes from originally, but it's an idea I've heard for most of my life in many different contexts. I think I probably first heard the concept as a kid in Sunday school, when I heard the story of Jesus throwing the money changers out of the temple. I certainly practiced the concept as a little girl when on Sundays I put 10% of my babysitting money into a small envelope and handed it to the bishop of our ward in the form of tithing. And as an adult and executive, I have heard CFOs express the same idea as they talk about institutional priorities and hard choices. I was once talking one-on-one with a CFO who pointed out, he said very explicitly, that our organizational budget revealed our institutional priorities. And then later, I shared his words with a provost, not his provost, a different. And she seemed unsettled by it. She disagreed. She pointed out that a budget can't possibly reflect institutional priorities because so much gets left out and so much is unfunded. So sitting around the president's table, the cabinet has to hash out its priorities and make compromises. And just because something doesn't show up in a budget doesn't mean it's not a priority. Yeah, so she's not wrong. And certainly anybody who has fought for a budget increase and certainly if they've lost it, knows what she's talking about. But I also think her disagreement

actually makes the point. Colleges and universities often profess to have priorities that they're actually not designed to support financially. The gap, I think, may not be in our priorities and our budgeting, as much as it's between what we feel we need to say we prioritize and what we actually do value.

[4:16] And I think it's not uncommon for individuals, especially in academic and student affairs, to feel like what they actually value is not appropriately reflected in an institutional budget. And this gap between what we value and what shows up in a budget, I think, is kind of always present for folks who have limited voice in budgetary decisions. But that in itself is a value too, right? Deciding who gets to speak up and even have the opportunity to have their values recognized in the process of choosing what we value by funding it, what we demonstrate we care about. If not, all voices are at that table, then there is no way all voices can be represented in the budgeting process and therefore it's not likely that our values can all be fully represented in the budget. So yeah, budgets are moral documents, both in what they reveal about our spending and our investments, and in what they reveal about who gets a say in resource development and allocation. So this idea is all around us, and even though I'm not sure where the.

[5:24] Actual phrase originated, I do know the moment I first encountered those particular words, not just the idea but those words. A budget is a moral document. Last summer, my son decided that his new puppy Bacon needed to see more of the world. Specifically, Bacon needed to see the place my son considers home. So we took a spur of the moment trip to the Twin Cities and stayed in a funky little boho-ish Airbnb in the Powderhorn neighborhood in Minneapolis. Powderhorn is a super walkable demographically diverse, community-focused neighborhood that's kind of historically full of lefties and liberals. It's a residential neighborhood with lots of little local shops. You can grab a cup of hand-brewed coffee at Duck Duck Coffee. You can play board games over burgers and beers at the Chatterbox Pub. And you can shop for bikes or vintage musical instruments or groceries or Scandinavian gifts all within blocks of each other. The neighborhood is named after Powderhorn Park, which is a sweet little park with rolling hills surrounding a smallish city lake. Shannon and I first went to Powderhorn years ago to watch a local cyclocross race, and then last summer our little three-month-old puppy made friends with all the kiddos shooting hoops and climbing on playground equipment. Powderhorn is a really great neighborhood. Also the neighborhood where George Floyd was murdered.

[6:51] This summer, we spent some time at George Floyd Square, which covers two blocks on Chicago Avenue, including the intersection where Whole Foods is located, and the whole area is dedicated to Floyd's memory. The streets are painted with names of black people killed by police throughout the country, and the main intersections now have public art installations, these massive black power fists that both inspire and require drivers to slow down as they drive past. They're not quite roundabouts, but you can't drive through the intersection fast. You have to kind of slow down and respect the fist in the middle of the street.

Now the neighborhood has always had an eclectic feel, both artsy and revolutionary. And that feeling persists now with an even stronger and more visible bend toward social justice, and anti-racism. This is reflected everywhere you look – art in people's front yards, posters hanging in windows, and public art, including murals on the exterior of buildings. One mural in particular caught my eye. It was a painting of people at work with what looked like a bike wheel portioned off in those pie pieces that kind of made it look like a Trivial Pursuit game piece, except that the pieces weren't all the same size. Instead, they were uneven representations of budget allocations and the phrase, a budget is a moral document, was painted in large letters off to the side. So, you know, I'm surrounded in this context and I come across that mural. I can't really describe what I felt when I saw it except that it made my breath catch and my heart race. And then later I couldn't get the phrase out of my head. I thought about it while walking around George Floyd square, standing in the square taking in the raw power of the fact that these two city blocks were a visual reminder that the people of Minneapolis forced the city to recognize the value of George Floyd's life and the dangers of the police. I thought about the efforts in Minneapolis to defund the police, what that says about moral choices and values.

[8:58] And I thought about the response from the University of Minnesota's president after George Floyd was murdered. When George Floyd was killed, the president of the campus where I worked was silent. She's not alone. Many presidents across the country were silent. In contrast, however, the president of the University of Minnesota immediately changed her institution's relationship to the Minneapolis Police Department. In a statement she wrote, describing her personal outrage at Floyd's murder and her decisions about the state of of Public Safety on the campus she was responsible for, she wrote these words, We have a responsibility to uphold our values and a duty to honor them. And that's it right there. We have a responsibility to uphold our values and a duty to honor them. A budget is a moral document.

How we spend our money, how we allocate our resources is a reflection of the values we hold most dear. We can pretend this isn't true, of course, and if you've been through an institutional budget cycle you've probably seen some of that pretending. But I also think we can be brave enough not to pretend. If we can get brave enough to look at our budgets through this lens and ask ourselves. What does this budget show that we care about, we can start to think really differently about where we put our money. So I can tell you personally, I carried this concept into my own business planning for 2023, and lots in my business changed as a result. I've changed the ultimate impact I want to make with the work I do. My daughter and I have decided to start a scholarship. She's going to design it and I've invited her to be a young board member. Right now she's thinking that the college scholarship will be available to students in Milwaukee Public Schools. I've also decided to build a second organization with express purpose of providing financial support to women and folks who identify as women when.

[10:52] They're pursuing leadership development. Because you know what? Leadership development around the country is expensive and it's often elite. So let's equalize that. All of these new thoughts.

Are really powerful to me and they have totally energized me with what feels like deep and meaningful purpose in my work. But the concept of budget as a moral document doesn't apply only to money. If we think about a budget as a way of divvying up limited resources, then we immediately see that money is not the only thing we budget. What are those other resources? We budget our time, our energy, our attention, even possibly our love. So let's set aside the idea of a monetary budget for a moment and think more broadly about the idea of what we budget in our lives.

Your accomplishments, your achievements, and your legacy are all evidence of how you budget and distribute your energy, your attention. Your kindness, your curiosity, your compassion, where you are now, wherever you are in your life's path, is the culmination of what you've spent your time doing so far. The topics you've studied, the expertise you've honed, the programs and initiatives you've designed and launched, the talents you've developed, the relationships you've nurtured, all come together to show the world who you are and what you value. When I think about my life that way it all feels so, oh my god, so big. Like everything is so deep and interconnected and I see areas I want to improve on and I don't even really know where to start and it can be really overwhelming. But there is a very easy, tangible place to start and that's your time. Your calendar is a visual representation of how you're budgeting your time, which is a way of seeing where you put your energy and attention because you value it. So what would happen if you looked at your calendar through this lens? What would your current calendar tell you about your values? And if you look at it that way, do you see ways you could adjust it to better reflect the morals and values that guide your life?

[12:59] I've spent a lot of time thinking about this, definitely since the pandemic, but honestly, even before. I have long felt the tension of living at the five-point intersection of, accomplished professional, people pleaser, high achiever, primary breadwinner, and emotional laborer. I have had more than one come-to-Jesus moment when I knew living in that intersection was probably killing me. And I know if you're a woman working in hybrid, you are familiar with that intersection. We all live there. And sometimes, honestly, I have loved living in that intersection. It helped me grow as a person. It helped me advance my career. It helped me build a network that grounds me and supports me. Yeah, that intersection has been dangerous, but it's also been beautiful. So if you're living in that intersection. And you want to stay there, but you also want to thrive, I want to help. And that's actually the whole purpose behind my entire business and the podcast. My ultimate goal is to elevate and amplify and support the voices of women who are doing amazing things in higher ed. So in the spirit of helping you think about where you put your time and energy and also in the spirit of amplifying other women's voices, I have a recommendation for you. I'd.

[14:12] Like to suggest you follow Loleen Berdahl over on Substack. Her newsletter is called Academia Made Easier and you can search it on Google and find it, but I'll also drop to the show notes and early in 2023 she reminded her readers of a new way to set goals. So you've heard of SMART goals, you've heard other methods, I really like her variation on the theme. So Bernal calls this the EASY method, E-A-S-Y, and that's an acronym. E stands for Energized, A for

Agency, S for Small, and Y for Yours. Easy goals are goals that you choose, you feel are possible, and that give you agency and autonomy. So if you're thinking about setting goals for the new year, and you're interested in setting goals that reflect your values, I highly recommend this quick read, her early 2023 newsletter, and even following her in general, I really like reading her newsletters. So I know we're kind of getting into 2023. You may have already set goals. For the year, but if you're still thinking about goals for the year, or if you have any interest in revisiting and refining your goals, I want to encourage you to think deeply about not just what you want to accomplish this year, but where you're going with your life. I know it's a cliché, but how you spend your minutes is how you spend your days and how you spend your days is how you spend your years and how you spend your years is how you spend your life. Think about that and look at the minutes on your calendar. Does your calendar reflect who you are, what you value.

[15:46] What you love, and where you want your life to take you? I hope it does and if so, yay, yay, amazing. And also if so, please start sharing your secrets with as many people as you possibly began. But if not, if you're not there yet, and if you're interested in making changes in the ways your calendar reflects your values and priorities, I've created an easy resource just for you. It's called the Grounded Academic Leader, and it's a short step-by-step guide. To using your heart's desires to organize your time and energy and, yes, your calendar. It even includes the checklist I use when reviewing my calendar at the beginning of every month and also every quarter, which gives me a chance to reflect on how things are going and to be intentional about the changes I make. I've dropped a link to this resource in the show notes and it's also available on the website. Just point your browser to www.theclariogroup.com forward slash resources.

And I know that sounds a little bit like a sales pitch, but honestly, I believe you deserve to live your days practicing and celebrating your values. And I want to help you do that. I want to help you transform your calendar to be the moral document you deserve to live by. Thanks for listening. I'll see you next week.

[17:13] One of the cornerstones of the professional development I've offered for years is leadership workshops for academics. I started delivering individual short workshops more than 25 years ago. Back in 2012, those evolved into the new Chair Leadership Seminar, which was designed specifically for department chairs and program directors, and which nearly 200 chairs and directors have. Participated in. In the last year, I've turned that into a leadership workshop specifically for women leaders. And it's called Leading with Clarity. Leading with Clarity is the only leadership course designed specifically to teach women in higher ed how to lead by connecting the dots between your personal priorities, your planning, and the ways you lead your people. Leading with Clarity is an online course designed like a group coaching experience. It includes core modules that teach you three frameworks. One for establishing priorities that align with your values, another for planning projects of any size and scope so that you're always working on impact instead of running around being busy with activities, and a third for leading

people through building trusting relationships grounded in inclusion and psychological safety. But in leading with clarity, you'll do more than simply learn theory and frameworks. The course also includes time for you to develop customized plans that are specific to your institutional context, as well as time for you to implement your plans, reflect on your progress, and get feedback on your growth. When you enroll in Leading with Clarity, you'll be joining a community of like-minded women in higher ed who lead with their hearts as well as their heads. And once you've enrolled, you'll have lifetime access to the course and all its materials so you can easily return to sections, guides, and tutorials as you need them in the future.

Leading with Clarity is starting in just a few weeks and doors to enroll will open soon. You can learn more at www.theclariogroup.com forward slash leading with clarity.

I really hope to see you there.

[19:30] Meanwhile, thank you so much for joining me for this week's episode of The Uplift, the podcast dedicated to elevating and amplifying women's leadership in higher education. Take a moment to follow, you can find me over on Apple Podcasts, Overcast, or Spotify, wherever you listen to your favorite podcasts. You can also find all previous episodes with transcripts, show notes, and links at my website, www.theclareogroup.com. And hey, I see you with your phone open. Come connect with me on social. You can follow the Clareo group on LinkedIn or Facebook. You can also just follow me and you'll see all the Clareo group content. And once you've followed, please drop me a DM to say hi. I'd like to know you're there. Alright, that's it. I will see you next week. Same time, same place, for the next episode of The Uplift.

Bye for now!