

Administrative & Student Services Workshop
August 2012
IRPO

Performance Budgeting 2014

Philosophy

The guiding principles :

- Be focused on outcomes
- Provide simple, accessible information
- Be understood and used by all
- Be flexible and responsive to the customer
- Support interdepartmental efforts
- Measure achievement
- Encourage continuous improvement
- Assist with strategic planning and demand management

What it Does

- States desired core outcome to be achieved
- Measures the success in achieving results
- Helps focus on the high-level outcomes desired
- Makes the budget more understandable and relevant to the community
- Empowers staff with flexibility
- Shows success more comprehensively and clearly (Measures overall service effectiveness)
- Better alignment:
 - organizational structure, processes, student/stakeholder, performance appraisal, training

Points

- Linking planning, assessment & resource allocation
 - Planning
 - Strategic Plan
 - Long term financial plan
 - Student learning outcomes (Institutional, program & course)
 - Integrated educational master plan
 - Annual Budget (as planning document)
 - Assessment
 - Program assessment
 - Program review
 - Program prioritization
 - Resource allocation
 - Long term and annual financial projections
 - Annual Budget (as resource allocation document)
- Enables holding departments/offices/campuses/college accountable
- Provides monitoring and reporting framework

Note on terminology

- The college uses the FSM BPS (Budget Preparation System)
- FSM BPS
 - Mission = Mission (at appropriate level college-program-office)
 - Objective = Outcome/objective (SMARTer format)
 - Strategy/activity = Strategies/action steps (SMARTer format)
 - Output (term used by FSM to quantify 3 trainings, 10 courses, 60,000 credit hours, etc.)

Instructional

- Central role of program learning outcomes (PLOs) in budget development 2014
- PLOs are the basis for allocation of budget
- One program review type outcome/objective (retention, graduation, program enrollment, etc.) may also be used if desired
- Integrated Educational Master plan provides the basis for strategy/activities
- Program assessment, program review and program prioritization provide input for overall resource allocation
- PLOs baseline and/or improvement targets vital
- Not all PLOs need to be targeted for improvement – some may be maintained at existing levels

Administrative & Student Services

Following are simple frameworks for constructing administrative and student services objectives.

<u>Name of Unit</u> will	Provide Improve Decrease Increase Provide quality etc. (see Bloom's taxonomy)	Name of Current Service
<u>Client</u>	... will be satisfied with	Name of Current Service
<u>Students attending</u>	<u>AES Services</u> Tutoring Academic Advising Workshops Counseling Services Etc.	<u>Verb+ objective</u> Improve Increase Understand Etc.

Budget categories

- What budget categories can be linked to PLOs?
 - Personnel
 - Travel
 - Supplies
 - Contracts
 - Equipment
 - Others

Recommendations Instructional

- Develop budget based on courses
 - Use the program matrix that links courses to PLOs
 - Course costs such as supplies may be estimated and spread over all courses that the division offers
 - Laboratory, vocational and other similar courses likely need a differential
- Divisions may also link costs to General Education Outcomes

Recommendations Administrative & Student Services

- Review the IAP handbook
- Make sure your department and office missions are aligned with the college mission
- Review the EMP
- Look at the ILOs for linkages
 - **COM-FSM graduates will demonstrate that they can:**
 - a. communicate effectively
 - b. employ critical thinking & problem solving
 - c. possess specific knowledge and skills in a major discipline or professional program of study.
 - d. take responsibility and develop skills for learning
 - e. interact responsibly with people, cultures, and their environment.

Timeline

Date	Action
July 30-August 3, 2012	Structure of the BPS Budget established and communicated to SBOC
2 nd Week of August 10 –August 24, 2012	Training by IRPO faculty, ICs, VPs on the worksheets for the performance budgeting and line item budget.
August 1 - September 28, 2012	Revenue Projections for the 2014 Budget Based cost should be established for each year - TCO
October 1-19, 2012	Determine resource allocations based on program assessment –reviewing revenue projections and program needs, integrated educational master plan and institutional priorities
October 15 - October 26, 2012	Resource allocations be reviewed by PRC and Finance Committee
October 29-November 9, 2012	Budget Worksheets are completed by the units
November 12-16, 2012	Compilation of the 2014 budget
November 19 – January 11, 2012	Input College budget into FSM PBS system
1 st Week of December 2012	2014 College Budget presented to BOR
January 15, 2012	College 2014 presented to FSM President

Issues

- Core costs will be developed by administrative services and provide a base for budget development:
 - Total costs of ownership (utilities, maintenance, etc.)
 - Full budgeting for personnel included in the budget

Forms & Questions

- Form review
- Questions?

Exercise:

- Review your 2012 assessment worksheets – what do they tell you?
- What are your needs for FY 2014? What evidence/data do you have to support that need?