

# Planning Budgeting Integration: 2010-11 Focus and Timeline

## Strategic Goals and Short-Term Objectives

The foundation of the PBI process is the District-wide Strategic Plan's five goals and the associated short-term objectives identified by the Chancellor with input from the college and district (See tab 4 of this packet).

## College Deliverables

The colleges will develop responses to the Short-Term Institutional Objectives. College Presidents will organize processes appropriate to their colleges to produce the following deliverables.

- All instructional, student services, and administrative areas at Peralta will need to look carefully at options for streamlining and focusing their programs to achieve cost savings. *Colleges and District Service Centers will be allocated budgets and must stay within these allocations.*
- The legislature indicated in the 2009-10 Budget Act that Transfer, Basic Skills, and Career-Technical Education are the areas of focus for community colleges. The State Chancellor's Office has recommended that these three areas are "an overall priority for colleges during this budget crisis...however long it lasts."

College Deliverables	Accountability	Due Date
1. College 2011-12 Annual Plans and Draft Budgets	College Presidents	November 1
2. College Program Viability, Consolidation and Prioritization Options	College Presidents	November 1
3. SLOs Assessment Status Reports		
3.A Current Status and 2010-11 Implementation steps	College Presidents	September 15
3.B Interim Progress Report on 2010-11 Implementation Steps	College Presidents	February 15
3.C Final Progress Report for 2010-11 and Action Plan for 2011-12	College Presidents	May 1

### *Deliverable 1: College Plans/Budgets*

The annual plans must be in summary form – no more than 15 pages.

Each college President is responsible for ensuring that their college plan addresses the following institutional objectives:

**A.1 Access:** Strategically focus access to programs and course offerings in the essential areas of basic skills, CTE, and transfer and manage enrollment to 19,950 FTES to stay within range of the state funded allocation. In addition, increase access to educational opportunities by leveraging contract education, fee based instruction, distance learning, and international and out-of-state enrollments.

**A.2 Success:** Identify institutional, instructional, and student support changes and develop an implementation plan to improve by 10 percentage points, student success rates and movement through basic skills/foundation course sequences by 2014-15.

**A.3 Equity:** Identify and plan for design and structural changes to reduce the fall to fall persistence gap among major ethnic groups to less than 2 percentage points by 2014-15.

**B.1 Partnerships:** Leverage, align, and expand partnerships for improved student learning and success in core educational functions.

**C.1 Implement Assessment of SLO's:** Ensure timely progress in implementing the assessment of SLO's to enable the measurement and improvement of student learning and student success.

**C.2 Extend the Use of Program Reviews:** Use program reviews in instruction and student services to identify factors for improving student success.

**C.3 Accreditation:** Respond proactively to all accreditation requests and achieve compliance with all standards.

**C.4 Create Alternatively Designed Programs:** At each college, create or expand a program exemplifying an alternative design with promise for substantially improving student success; engage the campus community to stimulate out-of-the-box thinking and action for student success.

**C.5 Leverage Technology:** Adapt and expand the use of technology as a means for improving student access, learning and success.

**D.1 District-Wide Collaboration:** Implement improvements to the Planning-Budgeting Integration Model: a) improve coordination and communication between PBI committees and between district planning and budget integration with that at the colleges; b) ensure PBI committees set and achieve key milestones; and c) maintain a strategic-level focus on improving student learning and success.

**D.2 Lower Structural Barriers to Faculty Collaboration:** Identify and implement ways to reduce structural silos to enable faculty collaboration and innovation teams.

**D.3 Use Technology in Redesign of Educational Experiences:** Enable more efficient and deeper student learning and student success through the creative use of technology.

**E.1 FTES Target:** Achieve state allocated FTES target for the district of 19,950 FTES and attain a productivity level of at least 17.5 FTES/FTEF.

**E.2 Focus Budgeting on Improving Student Success through Support for Structural Changes:** Respond to projected deficits and budget cuts by designing budgets that a) are based on program review and strategic directions; b) improve student success through support for high-impact structural changes; c) create efficiencies by sharing of positions, facilities and other resources within and across the colleges; e) consider the total cost of programs and support activities; and f) shift resources to core educational functions.

**E.3 Accreditation:** Bring into compliance with standards all aspects in the finance and budgeting area.

**E.4 Alternative Resources:** Increase alternative funding by 20% over 2009-10 through a variety of methods including gifts and grants, contract education, fee based, fundraising, international and out-of-state enrollments, and focus this funding on improving student success.

**E.5 Fiscal Stability:** Implement comprehensive improvements to the financial management systems of the district and make budget and finance information transparent and accessible to internal stakeholders.

**E.6 Balance the Budget:** Create a balanced budget and ensure that expenditures for all cost centers stay within the established budget.

***Deliverable 2: College Program Viability, Consolidation and Prioritization Options.***

Each college will address program viability, consolidation and prioritization for all areas of operations (Administrative Services, Instructional Services, Student Services).

***Deliverable 3: SLOs Assessment Status Reports***

Each college will provide a status report on the assessment of SLO's.

**College Deliverables Sources, Criteria and Organization**

The college deliverables should draw upon the following data

- Program reviews completed in Spring 2010
- College educational master plans
- Annual Unit Plans
- Equity Plan
- Matriculation Plan
- Technology Plan
- Facilities Planning
- College Budget
- Course Ranking Index
- Institutional data on the PCCD website

***Criteria for Plan and Budget Development***

- Strategically focus access to programs and course offerings in the essential areas of basic skills, CTE, and Transfer.

Criteria from 8/17/09 memo from Wise Allen on Class Schedule Reductions:

1. Regular full-time instructors may not teach beyond their regular full-time assignments more than 2 equated load or one (1) class on an extra service basis, whichever is greater, except by mutual agreement between the faculty member and the District;
2. Regular full-time instructors may not teach beyond their regular full-time assignment for the purpose of extra service credit until the full-time assignment has been accomplished.
3. The minimum class size shall be set at 20 for vocational/technical classes, and 25 for all others.
4. Exception to the minimum class size may include:
  - a. Classes needed for transfer;
  - b. Classes need for completion of a certificate;
  - c. Classes where there are a limited number of work stations;
  - d. Classes for students with disabilities;
  - e. Sequential classes;
  - f. Basic skills and remedial classes.

Please refer to Article 18.D of the PFT Contract Extension 2007-09, pgs. 29-30, for more information on the above parameters.

Also, further considerations should be given to the following factors when reducing the class schedule:

1. All things being equal, consideration of an adjunct when considering an extra-service assignment
2. Enrollment history of the course
3. Student retention
4. Enrollment at census
5. Productivity
6. Stand-alone status
7. Required for a major or certificate or graduation
8. Elective or enrichment
9. Growth of the discipline
10. Community need
11. FTES generation
12. Availability to be offered Summer or Fall
13. Learning communities and Honors Courses
14. Availability of equal course on same campus or another Peralta campus.

### *Plan / Budget Topics*

The plans will be organized into the following sections

- Education (includes Instructional Services and Student Services)
- Technology
- Facilities

### **PBI Committee Deliverables**

The PBI committees have two overall sets of deliverables:

Committee Deliverables	Accountability	Due Date
1. <u>Recommendations Based on College Deliverables</u> : Review the College deliverables listed above to recommend potential areas of collaboration across	Education Committee Chair Facilities Committee	December

the colleges and potential resolutions of any overlapping or conflicting college goals.	Chair Technology Committee Chair	
<p>2. <u>Options to Address District-wide Issues:</u> Recommend district-wide options for addressing major issues or opportunities. The Committee Chairs and Facilitator will review the list of issues and opportunities and recommend a focus for their committee (see below):</p> <ol style="list-style-type: none"> <li>1. Consolidation / Viability of services (instruction, student service, administrative)</li> <li>2. Smart classrooms</li> <li>3. Distance Education</li> <li>4. Student services</li> <li>5. Measure A Process</li> </ol>	Education Committee Chair  Facilities Committee Chair  Technology Committee Chair	TBD

### III. TIMELINE

1. Chancellor presents Annual Objectives and strategic focus	August 18
2. District Flex Day: District Wide Discipline meetings	August 18
3. College Flex Day: [recommended] Colleges begin process to prepare deliverables	August 19
4. PBI Kick-Off Retreat	August 27
5. College Presidents deliver SYNTHESIS/SUMMARY of 2010-11 Annual Plans/Budgets	November 10
6. Education, Facilities and Technology Committees work on "Options to Address District-wide Issues"	November 10
7. College Presidents deliver College Program Viability, Consolidation and Prioritization Options for Administrative Services, Instructional Services, and Student Services.	November 10
8. PBI Committee Chairs review and synthesize college deliverables for discussion at committees. Two topics are identified: (1) collaboration opportunities; and (2) overlap/conflicts.	October 22 to November 1
9. PBI committees review college materials and propose opportunities for coordination and other refinements to PBC.	November 1 - December 15

College Presidents to present to the committees	
10. PBC provides feedback to colleges on deliverables	January
11. Informational memo on Governor's proposed budget	January
12. Colleges submit draft budgets for 2011-12 (including any responses to PBI recommendations) to district	February
13. PBI Committees finish 2010-11 Deliverables and prepare for 2011-12 activities.	February - May
14. Budget development update with Academic Senate and faculty union.	March
15. PBC reviews budget proposals	April
16. Draft tentative budget presented to the Chancellor	May
17. Tentative budget presented to Board	June
18. Informational memos issued on proposed budget to constituencies based on approved state budget and information from CCC Chancellor's Office	July
19. Colleges meet with constituencies on budget priorities and submit revised priorities to Chancellor	July
20. Adopted budget available for review	August
21. Board holds public hearing on budget and approves	On/before Sep. 15