

REEDLEY COLLEGE BUDGET PRINCIPLES, GUIDELINES, PRIORITIES

BUDGET principles

- B** – Broad Participation
- U** – Understanding at all levels
- D** – Developed early to incorporate strategic planning
- G** – Gain accountability
- E** – Easy to Comprehend
- T** – Transparent

Budget Guidelines

- Manage resources to fund Strategic Initiatives that directly support student success, program growth and Vision 2025.
- Align with the strategic plan of the college including Vision, Mission, and Program Review
- Achieve Strategic Goals - ensuring sufficient resources for student success, expanding services (growth) and institutional support
- Maintain a college reserve of no less than 3%
- Continuous improvement (assessment and evaluation) of process to ensure effectiveness in allocating resources
- Align categorical/restricted programs with Strategic Goals; to the degree possible, use those funds to support on-going College expenditures even if on a one-time basis. Make maximum use of “flexibility with Categorical funds” as allowed

Budget Development Process

- Revenues
 - Allocations (General Funds, Lottery, Perkins, Instructional Equipment)
 - Forecast Local Revenues
- Expenses
 - Permanent Labor Costs (including step/column/longevity)
 - Benefits (including rate adjustments)
 - Temporary Labor (Adjunct, Overload)
 - Discretionary Costs (
- Alternate Funding Sources
 - Identify eligible departmental requests and send to committee for determination of funding
 - Identify funded requests
 - Unfunded items restored to worksheet requests
- Developed Budget Assumptions

Hiring Criteria for Staffing

- Positions that are mandatory and in accordance with the RC HR Staffing Plan

Prioritization Criteria

Essential Elements

- Priority
- Link to Program Review & Strategic Plan Goals
- Justification (what, who, why)
- Description
- Dollar amount of request

Definition of Prioritization

0 = State Mandated and required by accreditation, licensing, or regulatory requirement

1 = Essential to the operation of the program

Health and Safety Resolution

2 = Important, but not essential or required

3 = Expand or enhance program (wish list)

Prioritization Process

- Compile total budget requests summarized at a high level by major object codes (91, 92, 93, etc.) to evaluate how total requests compare to 3 years history and current year total revenues. (Include Full-time and Part-time payroll costs.)
- Sort all programs (RC/MC/OC) by prioritization 0, 1, 2, & 3. Subtotal each level of prioritization to compare to remaining revenue to fund discretionary requests.
- Compare program level budget requests:
 - Compare increase/decrease of request from prior year budget
 - Compare budget request to historical spending
 - Evaluate current year spending to budget request
 - Review justifications establishing need/or question those with no justification
 - Is this a one-time funding request?
 - Can dollar request be reduced incrementally?
 - Applied same % to supply budgets for all programs
 - Look for high cost requests
 - Justification
 - Support for ongoing costs
 - Look for alternate funding sources
- Identify and make recommendations of potential funding (provide in comment column)
- Sort all programs (RC/MC/OC) alphabetically or numerically by program, sort each program by prioritization 0, 1, 2, 3 and review the detail of requests
- Summarize the total of each program level requests and compare to prior year budget requests. Identify increase/decrease (+/-) of budget request by percentage. Evaluate detail of programs requesting a high variance
- Return to contact person for program for additional information

One Time Emergency Funding Request

Purpose

- One Time Funding Requests provides for nonrecurring funding of items that are considered emergency in nature and meet the Prioritization of 0 or 1 noted below.
- Recurring funding requests or special initiative requests must be advanced throughout the annual budget development process on budget

Definition of Prioritization

0 = State Mandated and required by accreditation, licensing or regulatory requirement.

1 = Essential to the operation of the program or health and safety.

Process

1. Units will first look into their own budgets to determine if they can reprioritize existing allocated funds
If no funding available -->
2. Units will complete the "Emergency One-Time Funding Request Form" with appropriate Justification, Links, Itemized List and quotes when the cost of the request is over \$1,000.
3. Unit or Dept. Chair / Division Rep will go to Dean to look more broadly for available funds
If no funding available, get Dean comments/acknowledgement -->
4. Unit or Dept. Chair / Division Rep or Dean will go to Vice President to look more broadly for available funds
If no funding available, get VP comments/acknowledgment -->
5. Present to Budget Committee to evaluate for use of Contingency Funding
6. Budget Committee meets to review request/s to: (a.) Check for full completion of request/s; justifications, links, itemized list and quotes (b.) Suggest alternate funding such as IEO monies, when applicable. (c.) Return to requestor for additional information, or when criteria are met, (d.) Pass motion for recommendation of approval/denial to President's Cabinet for their consideration and final determination.
7. Budget Committee to forward recommendations to President's Cabinet for consideration and final determination.
8. Budget Committee communicate to requestor and approving Dean and VP, the final determination of funding request.

Strategic Initiative Planning

Purpose

- Budget monitoring allows the college to determine if previously allocated funding will become available to redirect during the course of the fiscal year
- Strategic Initiative Funding Requests provides for redirection of contingency, breakage, or unused allocated funds to be used for innovative strategic initiative projects that would not normally be funded during the course of the budget prioritization process
- Recurring funding or special initiative requests must be advanced throughout the annual budget development process on budget worksheets

Process

Reviewed by Budget Committee 11/8/2012
Evaluation & Assessment by BC 04/10/2014

Reviewed by College Council 10/16/2013
Evaluation & Assessment by BC 8/2016

1. Administrative Services will review the expenditures compared to budget and determine if funding may become available to be redirected for campus use prior to the end of the fiscal year.(Feb/Mar)
2. Strategic Initiative projects will be forwarded by President's Cabinet, PAC, College Council, or from the budget worksheets, typically priority 2 or 3
3. President's Cabinet will evaluate the possible funding to be used for integrated college strategic initiatives identified
4. Recommendation of strategic initiative projects will be listed, justified, and aligned with college program reviews and strategic plan initiatives and goals. Vision 2025 will be considered in these projects
5. President's Cabinet will present to Budget committee for review and comment
6. Budget committee will present recommendations to College Council
7. President will make final determination

Resource Allocation

2017/18 BUDGET WORKSHEET

Department: Airo
 Unit Code: 272040
 Contact Per: David Ritchey

Account	Priority	Description of Requested Expenditure	2013/14 Actuals	2014/15 Actuals	2015/16 Actuals	2016/17 Approved Budget	TOTAL 2017/18 Request	2017/18 APPROVED BUDGET	BUDGET COMMITTEE COMMENTS	Link to Program Review Substantiated Goal	Request Link to Strategic Plan Initiative Goal #	Dept. Chair Adjustments	Dept. Chair Comments	Dean Adjustments	Dean Comments	VP Adjustments	VP Comments	
1000's Temporary Labor w/Benefits 3000's Student workers, lab aides, etc. Accts excluded adjacent facility	2																	
9210 Student Employees 9210 Student Employees																		
Subtotal of Temporary Labor/Benefits																		
4000's Supplies, Food, Materials																		
94310			12,664	21,497	13,699	14,540	16,000			1	#2.2							
94310		Per Supplies					5,000			2	#2.2							
94310		Per Supplies	247	66	498	200	200			1.2								
94410		Per Supplies																
94420		Per Supplies	736	203	400	400	400			4	#2.2							
94000 Publications and Catalogs 94400 Other Supplies			220	45	218	250	250			5	#2.3							
Subtotal of Supplies			14,057	21,604	14,415	15,340	25,850											
5000's Services, travel, guest speakers, memberships/accts																		
95250 Equipment Repair & Maint 95255 Computer HW Maint & Lic 95340 Computer SW Maint & Lic 95310 Conference 95315 Message 95350 Home Items 95300 Consultant Services 95710 Advertising 95725 Postage/Printing 95720 Printing & Binding 95928 Charitable Transportation			2,363	355	969	2,250	2,000											
Subtotal of Services/Travel			7,562	1,748	2,270	3,050	2,800											
6000's Equipment (new or replacement)																		
96510			20,613	9,849	32,797	20,999	60,000											
96512			42,232	33,401	49,462	39,389	93,650											
Subtotal of Equipment			20,613	9,849	32,797	20,999	60,000											
TOTAL OF BUDGET REQUEST			42,232	33,401	49,462	39,389	93,650											

Justification for Expenditure

The Aero program has gone through a complete curriculum restructuring that will necessitate ALL students attend lab simultaneously. This will place an additional burden on the laboratory space and equipment. In order to provide the basic skills and technical education (per FAA FAR 141.17 and FAR 147.19), many activities require expensive consumable supplies such as aluminum sheet metal, composite resin and fabric, aircraft fuel, fluids, etc. (electrical components, turbine engine parts, etc.). Several, but not all, of these items are not being set up with inflation or increased enrollment.

Because all students will be attending lab simultaneously, new, non-consumable equipment needs to be purchased. (See FAA FAR 147.19) Items include pneumatic hand drills, aviation strips, wrenches, milling tools, drafting equipment, specialty tools, etc. Because all students will be attending lab simultaneously, new non-consumable equipment needs to be purchased. (See FAA FAR 147.19) Items include pneumatic hand drills, aviation strips, wrenches, milling tools, drafting equipment, specialty repair tooling, paint guns, sanding machines, safety equipment, etc.

Items such as staples, pens, dry erase markers, folders, binders, are used by instructors in completing job assignments.

Aircraft engines, which are specified fuel and lubricants to run. Operating aircraft engines is part of the curriculum. Aircraft purchase of aviation related publications in order to stay current with industry trends. Used by both students and staff.

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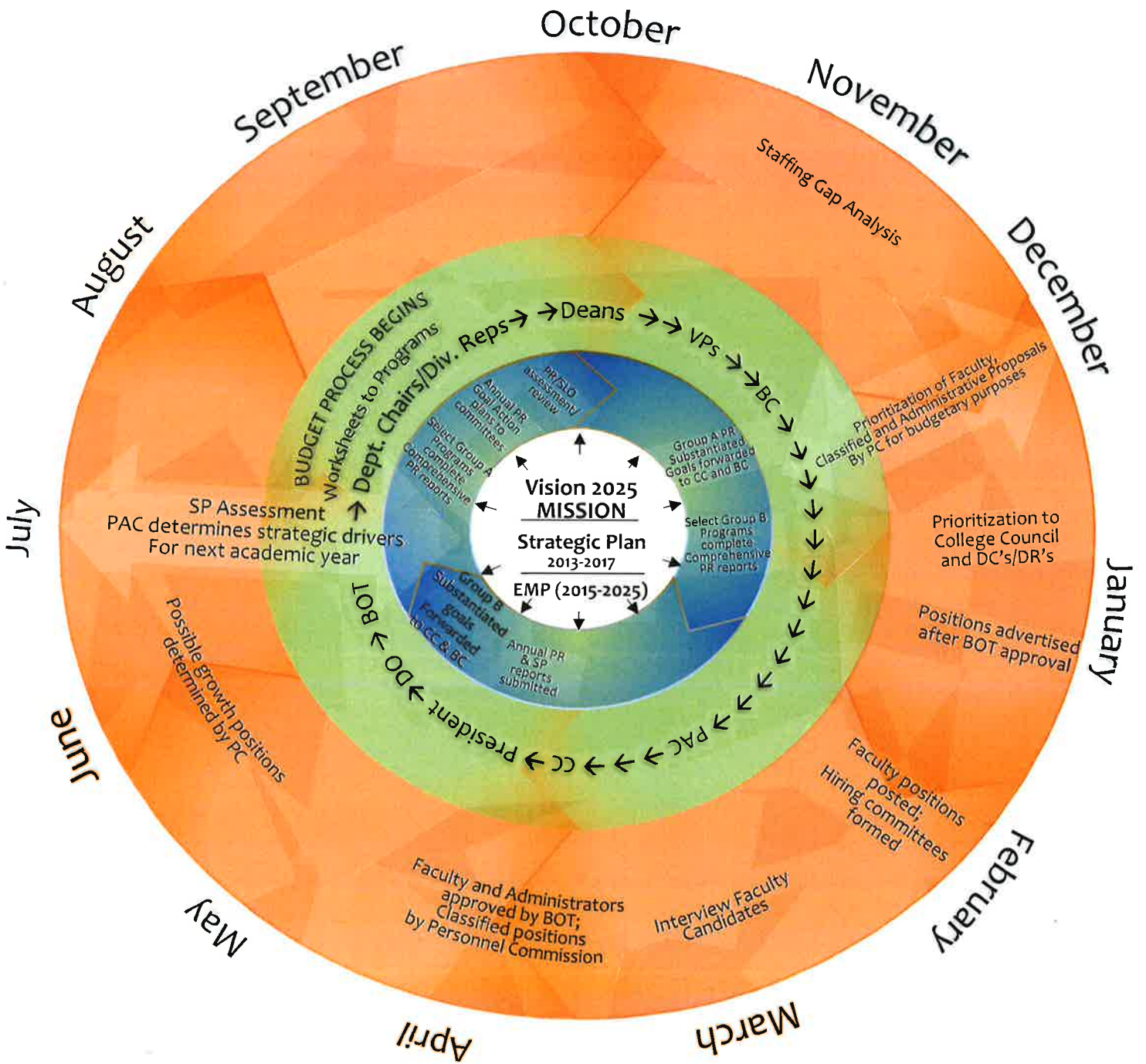
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Integrated Planning Cycle



RC Budget Development Planning Calendar

Approved by CC 4/17/14
 Approved by AS 4/16/14
 Approved by CS 3/18/14
 Presented to CC 9/18/13

SCCCD DEVELOPMENT

	<p>Submit to the departments what has been approved</p> <p>Formal review of the budget process</p>		<p>NY Tentative Budget approved by BOT</p>	<p>June</p>
SPRING	<p>Gather data for assessment and evaluation of budget process</p> <p>College Council approves Recommendation to President</p>		<p>NY Decision Packages approved by BOT</p> <p>Governor's May Revise</p>	<p>May</p>
	<p>Budget Committee complete</p> <p>Submit recommendation to College Council</p> <p>Submit recommendation to President's Advisory Cabinet</p>		<p>Submit tentative budgets to District</p>	<p>April</p>
	<p>Overall Prioritization</p>		<p>NY Decision Packages due to District</p>	<p>March</p>
	<p>Budget Committee to meet with program contact persons- VP/Dean/Dept. Chair, as required for clarifications</p>		<p>NY Budget Calendar approved BOT</p> <p>Decision Package Direction & Allocations</p> <p>NY Allocations to College</p>	<p>February</p>
	<p>Determine which Budget will fund the resource request; LTO, XXO, Perkins, etc..</p>		<p>Governors' January Budget</p>	<p>January</p>
	<p>Budget Committee meets for clarifications with VPs, Dean, & Department Chairs</p>			<p>November</p>
	<p>Budget Committee evaluates overall priorities & ranks</p>			<p>November</p>
	<p>Budget worksheets submitted for verifications & audit of linkages to Program Review, Strategic Plan & College Goals</p> <p>President's Cabinet for review of overall consolidation</p>			<p>October</p>
FALL	<p>Budget worksheets due for consolidation</p> <p>College Center Council for review of M/O consolidation</p>			<p>October</p>
	<p>Budget worksheets due: Revisions as determined by Dean & VP's, with input from Department Chairs/Division Representatives</p>			<p>October</p>
	<p>Budget worksheets due for review & input. Revisions as determined by Department Chairs/Division Representatives & Deans</p>			<p>September</p>
	<p>Budget Worksheet due; Revisions as determined</p>		<p>CY Final Budget approved by BOT</p>	<p>September</p>
	<p>Worksheets to Programs; develop requests & complete budget worksheet</p>		<p>CY Final Budget to District</p>	<p>August</p>

PERKINS COMMITTEE PROCESS

Committee Voting Members

Vice President of Instruction
Dean of Instruction Division C
Dean of Instruction Division B
Dean of Instruction Madera Center
Department Chair AGNR
Department Chair Business
Department Chair Industrial Technology
Department Chair Health Sciences and PE
Division Representative Madera Center
Division Representative Madera Center
Accountant/Auditor (Ex-Officio)

Budget Development Process

- Revenues
 - Allocation based on prior year funding. Actual funding is not distributed until late April

Prioritization Criteria

Essential Elements

- Allowable based on Perkins Guidelines
- Justification (what, who, why)
- Description
- Dollar amount of request
- Link to Program Review & Strategic Plan Goals
- Consensus Voting Model

Prioritization Process

- Compile total budget requests eligible for Perkins funding
- Perkins eligible funding requests are then submitted to the Perkins Advisory Committee by December for review
- Committee sorts all programs (RC/MC/OC) by prioritization A,B, C ect.
 - Identify required components for Perkins
 - Advisory Committees
 - Professional Development
 - Counseling/Tutorial
- Committee makes recommendation to fund required components noted above off the top

Recommendation from Perkins Committee to Budget
Approved by Budget Committee
Presented by Budget to College Council

4/23/2015
4/23/2015
5/6/2015

- Each Department Chair/Division Rep recommends for funding a programs highest priority item
 - Department Chair/Division Rep prior to meeting confirms priorities with programs
 - Committee discuss each item to ensure compliance with Perkins Guidelines
 - Justification and program need is discussed
 - Item is voted on by Committee to recommend funding or recommends alternate funding options
- Each Department Chair/Division Rep recommends next highest priority item until all available funding is exhausted
- Committee allows only items submitted through the initial budget process to be considered for funding
- All unfunded items are then sent back to Budget Committee for consideration

2015-16 Budget Committee Summary

Date	Discussion
5/10/2015	Progressive change occurred when canned comments from the Budget Committee were added into the worksheets where items weren't funded as requested.
5/14/2015	PAC submitted items as requested by Dr. Caldwell to be considered as Strategic Initiatives. Donna noted that these should have gone through the process. ---progress on this topic was made and documented in the 2/25/16, 3/10/16, 3/31/16, and 4/28/16 Budget Committee notes detailing how President's Cabinet went through the budget process in submitting Strategic Initiatives for larger scale items.
9/10/2015	<ul style="list-style-type: none"> • Progress Student Engagement monies from Special One-Time Requests • The committee imposed a 3 minute time frame for presentations to the committee aiding in the ability to move forward especially when there are working meetings that are needing to occur • Process - The committee continues to start off sorting in a way to provide anonymity to requestors, then begins working on priority levels • Aaron will be training Darin Soukup of Oakhurst • Stephanie advised that she will be conducting budget training for new faculty and may enlist the assistance of Melanie H.
9/24/2015	<ul style="list-style-type: none"> • Progress – Worksheets sent to Dept. Chairs/Div. Rep/Deans/VP 9/15/2015 o Email All notifying worksheets sent out 9/23/2015 o Training with Deans Group (Donna) 9/17/2015 o Training with SSLC (Melanie) 9/23/2015 o Training with OC (Aaron) • Aaron will be training Darin Soukup of Oakhurst • Stephanie advised that she will be conducting budget training for new faculty and may enlist the assistance of Melanie H.
10/8/2016	Establishment of 48-hour requirement for submissions of emergency one-time funding requests, prior to regular meeting.
10/22/2016	Challenges – heated discussions for emergency funding requests. The committee remained firm and neutral deferring to the appropriate source when topics that were out of their scope arose.
11/5/2016	Special One-time funding requests – The committee completed the process keeping in mind the need to be equitable across all sites Reedley College.
11/19/2016	<ul style="list-style-type: none"> • Special One-time Funding Requests – positive adjustments in how they were examined was completed. All requests for furniture were moved to a long list to then be weighed against one another. This was completed in an attempt to fund first what would most benefit students, then what was in need of replacement based on a needs assessed hierarchy. • The Budget Committee reviewed all requests attempting to fund as much as possible, finding alternate sources when a viable option. • PROGRESS – the Expenditure Approval Hierarchy was modified adding coordinators to the level of Directors, increasing dollar amounts in the hierarchy has proven to be successful. • PROGRESS – the Expenditure Approval Hierarchy was modified adding coordinators to the level of Directors, increasing dollar amounts in the hierarchy has proven to be successful.

2015-16 Budget Committee Summary

12/3/2016	<p>Discussion on the process took place:</p> <ul style="list-style-type: none"> • 91 requests with blank priorities were moved to the bottom • Those without justifications and priorities should be highlighted in some way for tracking purposes, to be able to reach out to them. • Tools to help individuals such as word wrap should be shared, this way they are not adding additional rows, etc. • Canned responses were created, making it a quicker process to cut and paste, cutting down on typing <p>Process in progress</p> <ul style="list-style-type: none"> • The budget committee found items that were eligible for Perkins although not listed as eligible • The committee began by sorting everything by priority – not sorted by location, not sorted by division, only from zeros down. • The committee added the budget committee comments column • Also added was the increase/decrease column allowing the budget committee to see if they are being equitable <p>Mini-Grant process</p> <ul style="list-style-type: none"> • Discussed was the way the process skewed from previous years where members of the Budget Committee were invited to participate in the process.
12/10/2016	<ul style="list-style-type: none"> • IEO monies were discussed. A process has been established – if monies were granted, yet not expended by a certain date – the money would go back into the pot for consideration of reallocation. • Progress in one-time emergency funding request form – change in language to include the need for an ‘itemized list’ was captured and implemented • The dates on the Budget Development Planning Calendar Flowchart were softened to alleviate needs for flexibility
1/14/2016	<p>Mini grants – the Budget Committee was firm in not allowing mini-grants that were not funded be approved automatically. At least one program had listed in their justification that their mini-grant needs would help enhance their program. The committee agreed that items that will enhance programs and ultimately cause curriculum changes should be included in worksheets.</p>
1/28/2016	<p>Effort to assist Madera Perkins was discussed. A meeting had been coordinated and was held on February 17th with CTE faculty aiding to prioritize, leading to overall prioritization once they meet again with the entire group.</p>
2/25/2016	<ul style="list-style-type: none"> • Committee was in support of Madera progressing and establishing its own Perkins and CDC subcommittees. Guidance was provided by Melanie and David Clark to Madera CTE and CDC faculty. Discussed were what was and was not allowable, they also went through all of the budget requests together. <p>**Roles of Department Chairs – Department Chairs shared the comment that they didn’t understand some of the justifications; they asked what their roles should be. Should it be the Deans who send worksheets back for clarity. The committee agreed that at no point should worksheets move forward unless there is clarity and justifications</p>
3/10/2016	<ul style="list-style-type: none"> • Suggestion to add ‘not applicable’ onto the worksheets was captured for programs that cannot tie their requests. • Budget Committee members, Marcy Davidson and Stephanie Curry offered their expertise in suggesting that they would be willing to offer training to department chairs
4/14/2016	<p>In regards to programs that do not complete their worksheets for whatever reason, to prevent negatively affecting programs, the committee will fund items that the Budget Committee knows are recurring requirements. To close the loop, the Budget Committee will send the worksheets back to the programs with the Budget Committee’s comments. Regarding the budget process, there is a need to continue educating the deans and VPs. This would help to ensure that they know what to look for and prevent unnecessary legwork by the Budget Committee.</p>

2015-16 Budget Committee Summary

4/28/2016	<ul style="list-style-type: none">• The Budget Committee, now with a defined budget process discussed how they would like to extend the process over to Categorical programs.• Target date for worksheet disbursal back to the submitting departments shall be no later than May 13, 2016. This will help to close the loop before they leave for the summer.• Conducting a survey was also discussed to try and capture comments fresh from the completion of the process.• Training department heads on budget monitoring and labor distribution reports was discussed as something that the Budget Committee needs to ensure takes place
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