Merritt College
Integrated Planning and Budgeting (IPB) Model
Overview of Annual IPB Cycle

Start

Phase I: Planning

July
- Align approved tentative budget from previous IPB cycle
- Pre-planning for upcoming IPB

August
- District Planning Summit
- District and College Flex Days (professional development)

September
Annual College Planning Summit (align with Mission and Educational Master Plan milestones, assess progress and set strategic goals)

November
- Cost Center Managers summarize resource request priorities
- Prioritize staffing positions, including faculty hire replacements

December
Participatory governance reviews resource requests

PROGRAM REVIEW (every 3 years) or APUs (other years)

September
Launch Program Review/Annual Program Updates (APUs)

October
Finalize Program Review/APUs

November
Validate Program Review/APUs

Phase II: Budgeting

January
College Council recommends resource requests to College President

February
- President communicates all approved resource requests
- Finalize all staffing positions including new faculty hires

February-March
Review Budget Template and Staffing Worksheets and submit to the participatory governance groups and College Council. Forward to College President for approval

April
- College President approves and submits preliminary budget to District
- "Closing the Loop": evaluation of College governance and key institutional processes

Phase III: Budget Adjustment & Finalization

May
District informs College of budget revisions based on Governor's budget revision

May-June
- College's Year-End Planning Summit
- District finalizes budget

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