

# Integrated

- ▶ Planning and Budgeting (IPB)



# ACCJC Standard III.D

Financial resources are sufficient to support and sustain student learning programs and services and improve institutional effectiveness. The distribution of resources supports the development, maintenance, allocation and reallocation, and enhancement of programs and services. The institution plans and manages its financial affairs with integrity and in a manner that ensures financial stability.

The institution clearly defines and follows its guidelines and processes for financial planning and budget development, with all constituencies having appropriate opportunities to participate in the development of institutional plans and budgets.

The institution's mission and goals are the foundation for financial planning, and financial planning is integrated with and supports all institutional planning.



- ▶ The College's Integrated Planning and Budgeting (IPB) Model is designed to provide solid and steady linkages between program and fiscal planning, budgeting and decision-making.
  
- ▶ Merritt's IPB cycle is divided into three distinct but interrelated phases:
  - Phase I - Planning (July - February)
  - Phase II - Budgeting (January - April)
  - Phase III - Budget Adjustment and Finalization (April - June)

## September

The Bi-Annual College Planning Summit launches the intensive planning phase of the College's IPB cycle.

The College launches an intensive, six-week campaign for training and completion of Program Review (every three years) or Annual Program Updates (APUs) college-wide. Through the Program Review/APU process, the College systematically assesses its institutional performance in the following areas:

- Administrative Units
- Instruction
- Student Services

# October

All Program Reviews or APUs are completed by the established deadline.

The deadline for the 2020-2021 academic year is October 26, 2020.

# November

Validation of Program Reviews/APUs are completed by the following: SLOAC\*, Curriculum Committee, IEC\*, Deans and Vice President of Instruction.



ANNUAL PROGRAM UPDATE VALIDATION FORM AND SIGNATURE PAGE

APU ELEMENTS	VALIDATION RANKINGS	MERRITT COLLEGE GOALS/PROGRAM
	Exemplary Satisfactory Developing	<ul style="list-style-type: none"> <li><b>Completion</b> – Increase number of degrees and certificates by 20% over the next 5 years.</li> <li><b>Transfer</b> – Increase transfers to CSU and UC by 6% annually. (Reach approx. 35% in 5 years).</li> <li><b>Time to Completion</b> – Reduce the number of excess units earned by students.</li> <li><b>Employment</b> – Maintain at least 82% of students attaining employment in the field of study.</li> <li><b>Equity</b> – Reduce the achievement gaps for African-American, multiethnic, and male students.</li> </ul>
	<b>Validation Ranking</b>	<b>Program Progress</b>
Program Overview		
Assessment*		
Curriculum**		
IEC***		
Facilities		
Program Data Analysis		
Use of Prior Awarded funds		
<b>Overall Ranking by Dean</b>		

Discipline, Discipline, Department or Program \_\_\_\_\_

Assessment Chair\* Signature/Date \_\_\_\_\_

Curriculum Chair\*\* Signature/Date \_\_\_\_\_

IEC Co-Chair Signature\*\*\*/Date \_\_\_\_\_

Dean Signature/Date \_\_\_\_\_

Vice President of Instruction/Date \_\_\_\_\_

Cost center managers summarize and prioritize resource request generated by the Program Review or APU process using a specified rubric.

Program Resource Request Rubric

ADMIN. ASSESSMENT CRITERIA	1. SLO/SAO Assessment Completed (New Program(s) Exempted) 2. Curriculum is recently developed or revised 3. Aligned with: a) PCCD/College Goals b) Ed. Master Plan
HIGH-LEVEL (HL)	Resource <b>directly</b> and <b>significantly</b> supports assessed student learning, service unit or institutional learning outcomes, curriculum is up to date and program goals are <b>aligned</b> with PCCD/College Goals and/or EMP.
MID-LEVEL (ML)	Resource supports #1 or #2, <u>and</u> 3. a or b
LOW-LEVEL (LL)	Resource supported by only one criterion: #1, #2, 3. a or b
Additional Rankings	N/A: Not Applicable – Does not meet criteria O/F: Other Funding

SLOAC - Student Learning Outcomes and Assessment Committee  
IEC - Institutional Effectiveness Committee



## December

A prioritized summary of resource needs categorized into the following areas; Equipment, Facilities, Resources, Technology is then forwarded through the colleges participatory governance review committees which include:

- ▶ College Facilities Committee (CFC) - December 1, 2020
  - ▶ Council of Department Chairs and Program Directors (CDCPD) - December 2, 2020
  - ▶ Merritt Technology Committee (MTC) - December 10, 2020
  - ▶ Institutional Effectiveness Committee (IEC) - December 9, 2020
  - ▶ College Budget Committee (CBC) - December 16, 2020
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## January

College Budget Committee (CBC) and the College Council will hold a joint meeting on **January 27, 2021** to review and recommend the prioritized resource list which is then sent to the President for final review and approval.



## February

- ▶ The College finalizes the list of proposed faculty and classified hires, based on replacement vacancies and the faculty and classified prioritization lists prepared by Merritt's Academic and Classified Senates. The President synthesizes and summarizes the College recommendations, and then submits these and all other final prioritized resource requests to the District by February 28.
- ▶ College provides the Budget Template and Staffing Worksheets to all cost center managers along with the prioritized list from the Program Reviews/APUs.

## March

- ▶ Cost center managers present their proposed budget templates/worksheets to the CBC.
- ▶ Budget requests are summarized and presented to the appropriate review committees and ultimately to the College Council **March 24, 2021** for review and recommendation.
- ▶ The College Council's recommendation of the budget is forwarded to the College President for final approval.

*April*

- ▶ Merritt's President submits the final approved budget templates/worksheets to the District Finance Office.

## MAY

- ▶ The revised College budget is ultimately approved through the District budgeting process as outlined in the District's Planning and Budgeting Integration Model (PBIM).
- ▶ The approved budget, which is developed directly out of the integrated planning and budgeting process, provides the foundation for the College's programs and operations for the next fiscal year, beginning in July.
- ▶ At the end of the IPB cycle the College holds its final IPB activity for the fiscal year, the President's Year-End Planning Summit. At this event, faculty, staff, administrators, and student representatives engage in institutional assessment, discuss any challenges faced by the College in reaching its strategic goals for the year, and celebrate the institution's achievements. The insights and priorities that emanate from this event inform the following year's IPB activities in an ongoing cycle of institutional assessment and improvement.