

MEMO

To: Integrated Planning & Budget (IP&B)

Cc: Academic Senate

Date: Jan. 30, 2019

Re: Annual Update Budget Request Form Timeline Feedback

The R&R Committee approves the proposed “Annual Update Budget Request Timeline,” believing this proposed timeline will facilitate the annual resource request process. The committee does have feedback for IP&B’s consideration and its members look forward to IP&B’s responses to the items listed below.

Feedback

While the R&R Committee agrees with the general framework of the “Annual Update Budget Request Timeline,” committee members would like IP&B to reflect on the following recommendations:

- While R&R is supportive of the proposed March 22, 2019 deadline, the committee proposes this date as a soft deadline, with the hard deadline of April 8, 2019.
RATIONALE: March 22 is the end of the quarter (right before finals week) and the review process would most likely occur in spring quarter, R&R recommends the flexibility of setting the firm deadline at the beginning of spring quarter (April 8). R&R recommends prioritizing the review of budget requests that are submitted by March 22 and any requests that are submitted past April 8 would only be prioritized if there were funds remaining.
- R&R recommends one additional training session between February 13, 2019 and when the Annual Update Budget Request Form is due (March 22, 2019). If additional training sessions are not feasible, support for those with questions should be clearly communicated (e.g. office hours, etc.).
RATIONALE: As this is the first time this form is being completed, individuals may have questions outside of the two proposed training sessions. It is currently less clear who/where individuals would direct their concerns.
- R&R recommends consistency in language—whether the process/form is called the “Budget Request Form” or the “Annual Update” or “Annual Update Budget Request Form.”
RATIONALE: There was some confusion among R&R members regarding terminology and the committee expressed concern that the college will be unsure as well, especially as this is a new process.
- R&R requests IP&B propose suggestions for rubric criteria to be used in resource request prioritization.

RATIONALE: R&R is looking for suggestions for the criteria used in the prioritization process because the committee wants to ensure there is alignment between IP&B's goals regarding the form and R&R's goals.

- R&R requests that IP&B invite Classified Senate into the review of "Budget Request Form" and its proposed timeline (similar to Academic Senate), provided it does not slow down the proposed timeline.

RATIONALE: As Classified Senate members will also be participating in this new process, R&R believes this constituency group would appreciate the courtesy of being included in any review process.

Next Steps:

- R&R recommends the following process after all resource requests are submitted:
 - Formation of an R&R sub-group that would appoint people whose positions are budgeteers for the various funding streams. This sub-group does include all existing R&R members;
 - R&R suggests that Deans review the forms before sending them to R&R as first review (should there be requests that could be removed, etc.);
 - R&R will develop a rubric to review and prioritize resource requests;
 - The sub-group will hold a retreat (one day or multiple days) where all forms are reviewed; and
 - The proposed timeline would aim to collect all forms by first week of April, hold the retreat and review forms by end of May, forward recommendations in June.