

MEMO

To: Resources & Revenue Committee

From: Integrated Planning & Budget (IP&B)

Cc: Academic Senate

Date: Jan. 17, 2019

Re: Annual Budget Request Form Recommendation Response

NOTE: IP&B's responses are highlighted in orange.

The R&R Committee approves the proposed "Annual Budget Request Form," believing this template will facilitate the existing 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 Budget Request Form," committee members would like IP&B to reflect on the following recommendations:

- Respond in document form to feedback from both Academic Senate and the R&R Committee—indicating whether each item was addressed (and rationale if not addressed);
- Indicate (or at least recommend) what the next steps would be once form is completed;
 - **The Annual Update template will be sent to the appropriate governance committees for review and approval. Pending approval, the template will be launched campus wide and each program will complete and submit the Annual Update form.**
- Identify timeline for the budget request form (included at top of document);
 - **IP&B has drafted an Annual Update Budget Planning Timeline. This timeline will be sent to R&R to be finalized.**
- Determine whether requests for reassign/release time should be included on the form (committee members could not locate on draft);
 - **Reassign/release time and non-instructional stipends are included on the revised template.**
- Provide a direct web link to the college strategic plan for easy reference;
 - **A direct web link to the college strategic plan is included on the revised template.**
- Change prompt in the "Professional Development Request" section from "Identify how you will measure success if this activity is funded" to "Identify how you will measure the impact if this activity is funded" (for alignment with "Identify how you will measure impact if this travel is funded" as stated in the prompt that follows).
 - **Changes for the "Professional Development Request" prompt is included on the revised template.**

- Identify a contact person for each resource request category (e.g. lottery—contact Bret Watson; Strong Workforce/Perkins—contact Teresa Ong, etc.) so that programs who might support the program’s questions; and
 - **Contact person(s) is included on the revised template.**
- Guidance regarding what the process will be after the budget forms are completed and what specific elements should be included on the resource request rubric (e.g. a study group?).
 - **IP&B will propose a process for resource request prioritization and the Annual Update Budget Form will be sent to the appropriate governance committees for review and prioritization.**

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