

## Peralta Community College District

# PLANNING AND BUDGETING INTEGRATION (PBI)

DRAFT CONCEPT February 2, 2009

This draft document provides an overview of a potential Planning and Budgeting Integration Process for the Peralta Community College District (PCCD PBI). The following draft elements are being put forward as necessary components of effective planning and budgeting integration that the Chancellor and the Planning and Budgeting Council must ensure are enacted within the policies and procedures

### Purpose and Need

- The draft PBI implements the Strategic Plan mission. It is intended to promote the highest levels of success for students by providing a supportive framework for college planning.
- The draft Planning and Budgeting Integration process (PBI) is being developed to implement a structured advisory process leading to decision-making. The PBI is consistent with AB 1725 in which the Chancellor has final authority for making administrative decisions and for making recommendations for Board action.
- The PBI provides consistent planning templates, activities and data to ensure transparent and predictable advisory process leading to decision-making. These common parameters are needed to promote coordination and collaboration within a district of four comprehensive colleges within a small geographic area.
- The PBI provides processes to resolve conflicts between the colleges in the case of duplicative programs or unproductive competition.

### Organization

- Working in partnership with the district office, the colleges have the primary responsibility for developing educational and resource plans to meet the needs of students. The PCCD PBI provides a supportive framework for college planning by providing consistent planning templates and data and ensuring transparent and predictable advisory process leading to decision-making.
- PCCD relies upon its strategic planning processes as the foundation for integrating planning and budgeting. Strategic planning includes the Peralta Strategic Plan, educational master planning, facilities master planning, information technology planning, and fiscal planning.
- PCCD clearly defines and follows its guidelines and processes for planning and budget integration

### Accountability

- PCCD must have in place a system that has appropriate accountability mechanisms to ensure the integrity and credibility of planning and budgeting integration.
- College plans and budgets must be approved through the colleges' shared governance before being addressed in the PCCD PBI. supportive framework for college planning by providing consistent planning templates and data and ensuring transparent and predictable advisory process leading to decision-making.

### Support for Effectiveness

- The district is recommended to provide adequate support for the PBI. This includes providing appropriate technical support (e.g., research, policy) and logistics and minutes.
- The goal is to have fewer, more highly supported action meetings at key decision making milestones, rather than more frequent discussion-oriented sessions.

### PROCESS OVERVIEW

The PBI is proposed as shown on the organization chart below and described below.

### Decision-Making Milestones

There will be a firm calendar for each step in the advisory process leading to decision-making (see PBI graphic and narrative).

### College Planning

College planning is the foundation of the PBI as the colleges are closest to the educational needs of students. As the first element of the PBI, the colleges conduct periodic program reviews, prepare annual unit plans, and develop annual educational and resource plan priorities. The colleges integrate the results of their "subject-matter" committees into college planning, e.g., technology committees, curriculum committees, facilities committees, etc.

During periodic master planning and during annual institutional planning, the colleges develop plans addressing: instructional and student services programs; staffing priorities; fiscal priorities; IT and equipment; facilities; marketing.

### District Subject-Matter Committees: Education, Information Technology, Facilities

The role of the three proposed district subject matter committees is to support the colleges in coordinating their efforts and resolving conflicts. The committees also provide subject matter expertise in their respective areas by including college representatives with relevant knowledge, responsibility, and experience. The committees would be responsible for communicating with their counter-part committees at the colleges (including possible cross-membership). The committees are recommended to have cross-membership with the PBC.

**Role in the Advisory Process:** The subject matter committees make the official recommendation to the Planning and Budgeting Council in their respective areas. The committees will indicate the status of recommendations:

- *Consensus:* The committees will indicate which recommendations have achieved committee consensus. These decisions are considered to reflect a consensus across the colleges and are not expected to be revisited substantively by the PBC. Rather the PBC evaluates proposed priorities as a set and recommends ways to integrate, prioritize and fund them.
- *Unresolved Conflicts (aka "Tough Decisions"):* The committees will indicate where there outstanding issues requiring PBC action.

### Planning and Budgeting Council

The PBC recommends integrated educational and resource priorities to the Chancellor. The PBC also provides feedback on Board policies and policies and decisions initiated by the Chancellor. For unresolved conflicts, the PBC recommends resolutions where colleges propose conflicting plans and cannot reach agreement.

For consensus items, the PBC performs the following functions: (1) Affirms consistency with strategic and educational plans; (2) recommends a coordinated planning approach across education, facilities, IT, fiscal, etc., and across colleges and initiatives; (3) recommends a prioritization of plans across subject areas and colleges; (4) identifies funding approaches to support the priorities.

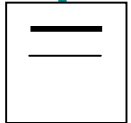
Other PBC roles include: Strategic Plan implementation oversight. The PBC also ensures accountability for follow-through on recommendations: 1) recommendation implemented including any modifications 2) recommendation not implemented and the reasons for it not being implemented; and Accountability and for follow-through on process steps: Did constituencies, colleges, district service centers, committees, etc., perform the agreed upon steps in the process.

**DRAFT (2/2/09)**

This proposal – if adopted – would be implemented in July 2009.

**Board of Trustees**

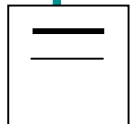
**Chancellor**



**Integrated Planning and Budget Priorities**

**District Planning and Budgeting Council**

<p><b>Charge</b></p> <ul style="list-style-type: none"><li>Recommend integrated educational and resource priorities to the chancellor</li><li>Provide feedback on policies and decisions initiated by the Chancellor.</li></ul>	<p><b>Recommendation Accountability</b></p> <p>Chancellor to provide feedback 1) recommendation implemented including any modifications 2) recommendation not implemented and the reasons for it not being implemented</p>	<p><b>Process Accountability</b></p> <p>PBC to follow up on agreements: Did constituencies, colleges, district service centers, committees, etc., perform the agreed upon steps: 1) reporting back to constituencies/obtaining responses; 2) using the agreed-upon planning methods and parameters.</p>
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**Integrated Education Priorities**



**Integrated Information Technology Priorities**



**Integrated Facilities Priorities**

**District Education Committee**

Responsibilities:

- Educational planning
- Program planning
- Staffing priorities
- Academic calendar
- Catalog
- Etc.

**District Information Technology Committee**

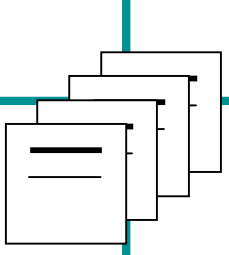
Responsibilities:

- Web site
- PROMPT
- Passport
- Smart classroom (technology aspects)
- Catalog (technology aspect)
- Etc.

**District Facilities Committee**

Facilities:

- New, modernization, rehab of facilities
- Infrastructure
- Maintenance
- Facilities master planning
- Etc.



**College Education & Resource Priorities**

- Instruction / Service Goals
- Staffing Priorities
  - Fiscal Priorities
  - IT and Equipment
  - Facilities

**Berkeley City College**

**College of Alameda**

**Laney College**

**Merritt College**