| Do we meet the standard? | No: Ineffective |
|---|---|
| Comment: | Once again, this is too broad of a question and covers multiple areas. I believe that we do a good job with some, but not all of the areas listed. It would be easier to answer this questions if you separated the areas listed. |

**Q5: 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.**

| Do we meet the standard? | No: Somewhat effective |
|---|---|
| Comment: | I think we do this well to a certain extent. We appear to be able to request and receive funds for instructional supplies and equipment, but there are some other areas that are not adequately supported or funded. An example would be student services and campus support services (IT, grounds, maintenance, etc...). While most services are available during the day, many if not most of these services are not provided during the evening. We have a lot of evening classes and the students and faculty in those classes have zero support in certain areas because the support departments only maintain morning hours. It almost seems as though the evening population is ignored. They do not receive access to the same services and support that the day students receive. |

**Q6: The institution's mission and goals are the foundation for financial planning, and financial planning is integrated with and supports all institutional planning. The institution has policies and procedures to ensure sound financial practices and financial stability. Appropriate financial information is disseminated throughout the institution in a timely manner.**

| Do we meet the standard? | No: Somewhat effective |
|---|---|
| What evidence/data is there? Is it systemic? What gaps exist? | As mentioned previously, we have a terrific mission, but some of the decisions that are made (at the instruction level) have very little to do with the mission and more to do with increasing state subsidies without any regard to the impact on students pursuing specific certificate or degree programs at Mt.SAC. I do think that the college does a good job of disseminating information, but once again that doesn't translate to student focused decisions. |

**Q7: 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.**

| Do we meet the standard? | No: Somewhat effective |
|---|---|
| Comment: | A budget and plan is requested from various departments and division across campus. We also gather requests for emergency funds, etc... So we seem to do a good job of collecting data and requests. |

**Q8: The institution establishes and implements written policy authorizing administrator, faculty, and staff participation in decision-making processes. The policy makes provisions for consideration of student views and judgments in those matters in which students have a direct and reasonable interest. Policy specifies the manner in which individuals bring forward ideas and work together on appropriate policy, planning, and special-purpose committees.**

| Do we meet the standard? | No: Ineffective |
|---|---|
| What evidence/data is there? Is it systemic? What gaps exist? | I think Mt.SAC falls flat on its face in this area. If there is a board policy to support this, it's not aggressively promoted. |

**Q9: Administrators and faculty have a substantive and clearly defined role in institutional governance and exercise a substantial voice in institutional policies, planning, and budget that relate to their areas of responsibility and expertise.**

| Do we meet the standard? | Yes: Effective |
|---|---|
| What evidence/data is there? Is it systemic? What gaps exist? | To a certain extent, yes. Senate and the Faculty Association provide platforms and opportunities for shared governance. We fall short in the area of personnel management. Once again it seems to take a stroke of a pen to hire new managers and create new management titles, but it takes years to create or replace faculty positions. We make the faculty compete and fight to get these positions hired. The faculty have to compete at the department level, then the division level, then the Senate gets to rank the faculty request positions (I'm not sure why) before it's forwarded to an executive. The process is absolutely ridiculous. |

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## Budget Committee Calendar:

Spring:

- Reviews Preliminary Tentative Budget (March);
- Determines new resources available for allocation (usually March);
- Communicates expected budget situation, resources, and process to campus community (usually March);
- Reviews one-time new resources allocation requests previously funded; (usually March); - Proposal is to add this bullet point.
- Reviews details of the previous year's actual expenses for selected departments/units (usually April);
- Reviews relationships across campus (e.g.: department costs per FTES) (usually April);
- Reviews Tentative Budget (June)
- Tentative Budget approved by Board prior to July 1$^{st}$

Summer:

- Meets only if an emergency arises

Fall:

- Adopted Budget approved by Board, including allocation for New Resources (on or before September 15);
- Reviews prioritized one-time New Resource Requests (September);
- Makes recommendations on changing one-time funding New Resources expenditures to ongoing (September );
- Cabinet acts on New Resource Requests (October);
- Meets jointly with the Institutional Effectiveness Committee to review PIE summaries and coordinate planning efforts (October);
- Reviews previous fiscal year's total actual expenditure summary from Fiscal Services (November);
- Compares previous year Adopted Budget to previous year's actual expenditures (November)
- Compares previous year's Adopted Budget to Current year's Adopted Budget (November)
- Evaluates Budget Allocation Process (November); and
- Makes recommendations on changing budgetary policies and procedures to PAC (December)

Winter:
- Meets only if needed to complete fall activities

15

## Appendix C
## 2014-15 BUDGET DEVELOPMENT CALENDAR
(Initially approved by Budget Committee on May 7, 2014 and revised on October 1, 2014)

| DESCRIPTION OF TASK | DUE DATE | DUE DATE |
|---|---|---|
| Fiscal Services Updates and Projects Personnel Budget (Changes through January 8, 2014 Board Agenda) | 01/31/14 | |
| Fiscal Services Distributes Status Quo Budget Sheets to Departments for Tentative Budget Changes | 03/03/14 | |
| Departments Complete Status Quo Budget Review; Then Sends to Deans/Directors | 03/14/14 | |
| Fiscal Services Prepares Preliminary Tentative Budget | 03/25/14 | |
| Deans/Directors Review and Approve Department's Status Quo Budgets; Then sends to VPs | 03/28/14 | |
| Vice Presidents Review and Approve Department's Status Quo Budgets; Then sends to Fiscal | 04/11/14 | |
| Budget Committee Reviews Preliminary Tentative Budget (On a regular basis will be done on March) | 05/07/14 | |
| Budget Committee Determines and Communicates New Resources Available (On a regular basis will be done on March) | 05/07/14 | |
| Budget Committee sends Communication Campus wide Regarding New Resources Allocation Process (On a regular basis will be done on March | 05/09/14 | |
| Departments Prioritize New Resources Requests for One-Time Funding in their PIE forms | 05/15/14 to 06/30/14 | |
| Budget Committee Reviews the Completed Tentative Budget | 06/04/14 | |
| Fiscal Services Completes the Tentative Budget and Prepares Board Agenda Item | 06/06/14 | |
| Tentative Budget Submitted for Board Approval | 06/25/14 | |
| Fiscal Services' Deadline for 2013-14 Year End Closing | 07/25/14 | |
| Deans/Directors Prioritize Department's New Resource Allocation Requests | 07/01/14 | |
| Vice Presidents Prioritize Team's New Resource Allocation Requests and submits to Fiscal Services | 08/15/14 | |
| Budget Committee Reviews the Completed Adopted Budget | 09/03/14 | |
| Board of Trustees Approves Adopted Budget | 09/10/14 | |
| Budget Committee Reviews New Resource Allocation Requests | 09/03/14 | 10/1/2014 |
| Budget Committee Finalizes Review of New Resource Allocation Requests and forwards to President's Advisory Council | 09/17/14 | 10/15/2014 |
| President's Advisory Council Reviews New Resources Allocation Requests and forwards to President's Cabinet | 09/24/17 | 10/22/2014 |
| President Makes Final Decision on New Resources Requests Based on President's Cabinet Recommendations; and Budget Committee and President's Advisory Council reviews | 10/07/14 | 10/28/2014 |
| Vice Presidents submit New Resources Allocation Forms for funded New Resource Allocation Requests to Fiscal Services | TBD | TBD |
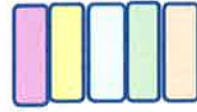
**Budget Committee**
**Department level**
**Administrative Level**
**Other Groups**
**Fiscal Services**