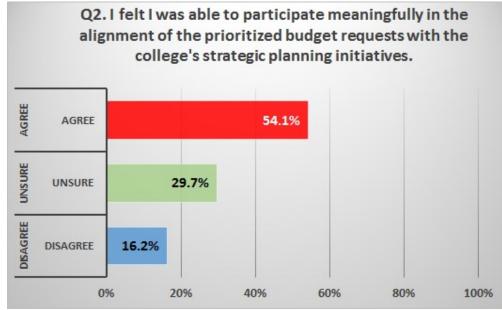March 2016

2016 Budget Retreat Survey Results

The Budget Retreat survey was distributed to fifty-two (52) individuals who had attended the Budget Retreat on February 5, 2016 via email. Thirty-Seven (37) individuals responded providing a response rate of 71%.

In general, responses to the Budget Retreat and the Integrated Planning Model were positive. There is still concern among the 37 that respondents that the Integrated Planning Model is not transparent, with 46% indicating that they were "unsure" if the model was transparent.

Q1. I have a better understanding of the complexity of the college's budget process because of the information presented at the retreat.

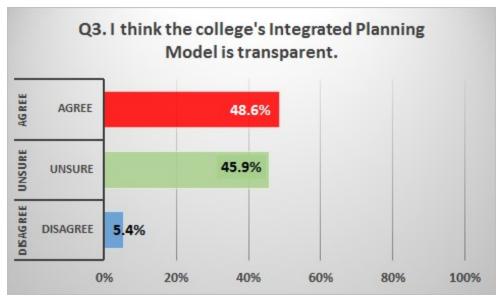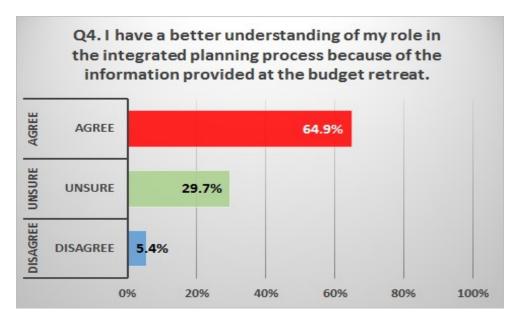|	
AGREE	86.5%
UNSURE	10.8%
DISAGREE	2.7%

As illustrated in **Q1**, 86% of the respondents felt that they obtained a better understanding of the complexities of the college's budgeting process because of information presented at the Retreat. This does not confirm that they completely understand the college's budgeting process but at least the retreat was able to provide information that lead to further understanding. The college needs to continue to provide timely and comprehensive information on budget development and resource allocation decisions.
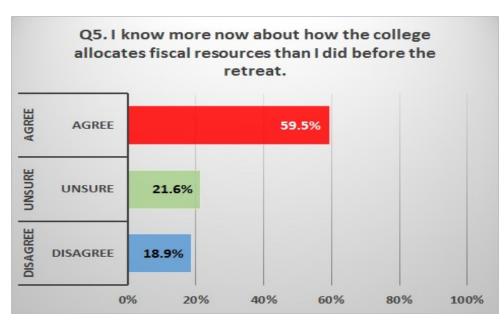

Q2. I felt I was able to participate meaningfully in the alignment of the prioritized budget requests with the college's strategic planning initiatives.

AGREE	54.1%
UNSURE	29.7%
DISAGREE	16.2%

In **Q2** respondents we asked if they felt they were able to participate meaningfully in the alignment of the budget requests with the college's strategic planning initiatives. Although a majority indicated they felt they did (54%) this is not an overwhelming endorsement of the process and needs further consideration for the next cycle.

Q3. I think the college's Integrated Planning Model is transparent.

AGREE	48.6%
UNSURE	45.9%
DISAGREE	5.4%

0% 20% 40% 60% 80% 100%

Q4. I have a better understanding of my role in the integrated planning process because of the information provided at the budget retreat.

AGREE	64.9%
UNSURE	29.7%
DISAGREE	5.4%

0% 20% 40% 60% 80% 100%

Q5. I know more now about how the college allocates fiscal resources than I did before the retreat.

AGREE	59.5%
UNSURE	21.6%
DISAGREE	18.9%

0% 20% 40% 60% 80% 100%

Q3 is the most problematic because less than have of the respondent indicated that they felt the Integrated Planning Model was transparent. Transparency and an Accreditation recommendation were the primary factors leading to the revised Integrated Planning Model. Thus the college has work to do to address the perceived and real transparency of the model.

Q4 addresses respondents understanding of their role in the integrated planning process based on information received at the budget retreat. Although a majority (64%) felt they did have a better understanding of their role in integrated planning process, it is important to remember that the college employees around 800 fulltime employees that all need to have a comprehensive understanding of their role in integrated planning. The 2016 Budget retreat was a good start but the college needs to continue to communicate the role of all employees in the integrated planning process.

Q5 addresses respondents knowledge of how the college allocates fiscal resources. Again a majority (59%), felt they knew more about resource allocation because of the retreat which is positive but illustrates the college's need to continue to be transparent in resource allocation and provide additional opportunities for campus constituents to be engaged in the integrated planning process.

The next two pages contain the responses to the open-ended

Q6. Please provide suggestions on how you think the budget retreat could be improved.

There was not enough time to go through all of the requests.
Provide a one page summary sheet with main ideas, players, contact information, etc..
I thought the prioritization process was good but not enough time was allotted. If the task does not depend on us finishing the work, then how much is the allocation really going to depend on the engagement of that group?
Provide more time to complete and debrief regarding the budget sheets.
I apologize but I missed the morning session which probably laid the groundwork for the rest of the event, which is why I answered the way I did. I thought the afternoon activity to look at the requests through different lenses was interesting, although I wondered if the information gathered would really help inform the decision-making at the next level.
I am not able to make any suggestions for improvement for the budget retreat.
Not sure how the work done at retreat will be used - as a loose 'guide' for the next phase, or as hard numbers and information. Also, I'd like to know when we will see the results of the ratings and compare it to what came before the retreat in terms of rating and what comes after the retreat in terms of allocation of funds (ie: what projects got funded).
Spend more time during the prioritization breakout session and less time team building to ensure all requests are reviewed.
I would have liked a better definition of how we were supposed to score the items. The hardest was Institutional Effectiveness, were we supposed to score it on what recommendations the Accreditation team gave, on what we think will make PCC a more effective institution or on something else. The other suggestion would be to give each 3-group section a third of the budget requests and have us rotate between those, instead of us trying to read everything.
The prioritization exercise was good as an exercise, but was an incomplete process as there was not enough time for everyone to participate in the prioritization of all lists. I would be uncomfortable with the results being used in this year's prioritization process. Would like to see the exercise become part of future process, though, as it forces us to look beyond our own areas (dare I say "silos") to truly understand the institution as a whole, and the needs we face.
The budget retreat should focus on information rather than having the participants, who have little or no expertise on the requested items, to prioritize. Hours have been spent by faculty and managers prioritizing the requests. It is very difficult, if not impossible, for people to do it "on the fly" in that manner. The requests have already been prioritized repeatedly, and I am not sure that what happened at the retreat added much value. I think it did help to educate people, though, on the types of requests that were submitted.
Be more brief.
I am a manager, so while I think the retreat was very helpful in many ways, where I disagree is about learning "more" than I already knew.
Include same info as in am session, but more condensed.
Clearer instructions on how we are to evaluate the budget requests. Our group did not understand the directions and mis-prioritized the first two 'lenses'.
If we gave 'points' for FLEX credit, this could be included and more faculty would attend.
Some of the information sessions were rather long... helpful but long. (I'm looking at you, Paul Jarrell.) Also, I feel like we spent a lot of time hearing from the Administration but no time from the faculty perspective. Maybe in future there's a bigger role for faculty to play? I know Stephanie Fleming kicked things off, but that was about it.
Since we don't yet know the outcome of the budget requests it is difficult to judge "how the college (will) allocate fiscal resources" or what my role is. It was clear that more is requested than is available, but we don't know how budget retreat input will be utilized.
There were some items on the spreadsheets that were under $1,000; seemed like we spent a lot of time discussing some small requests and were not able to finish the sheet. Could there be a Dollar threshold that needs to be met before they get on the spreadsheets? Or could the spreadsheets be sorted high to low?
Kudos to the facilitators for organizing such a well-run workshop. Topics were well presented and facilitators were all very approachable. The excercise on looking at the budget request using various lens was a bit daunting and overwhelming. The toughest was the community engagement lens. We did need more time and more explanation on that one. We ended up assigning a lot of zeores since we were not clear of our task. However, the workshop was one of the best I have attended lately. We need to get more faculty involved with the process. Thank you.
Format was too long and tiring. Reduce number of rotations to evaluate processes. Directions, at times, were unclear as to what to do or the role of the leads.
I thought it was a great meeting. Everyone was very active in the conversation. I didn't see many people on their personal devices as the topics were given in a very unique way that made the audience stay engaged at all times. Maybe breaking it into two day not all in one day.
I appreciate the enrollment management discussion, but would like to understand the entire budget development process rather than narrow focus on income. Expenses in addition to faculty salaries and benefits need to be considered and presented in an honest and complete way.
did not finish ranking. This activity may need to be reevaluated for next year. Also, at each table, not all the supporting documents were available. Every table needed all the same material for consistency in decision making.
Would have like to participate with all the tables and lenses.
Silk purse out of a sow's ear. I think it went well.
I would be better to have time allotted for every group to complete the prioritization process.
Perhaps two days instead of one... I would have liked to have had more time to digest the information from the morning session before attempting to do the budget ranking in the afternoon... and, I was tired by the time the afternoon rolled around :)

Q7. Please provide suggestions on how you think the integrated planning process could be improved.

Provide a one page diagram with main players/parts of process
Budget 2.0 should be a review of the collective answers/prioritization S and the actual amounts that are going to be submitted to the Trustees. A review process would identify if the first review got it right. For those areas that don't align, a variance explanation should be created. A final check off should be part of this group's responsibility.
A new scoring rubric needs to be developed. The 3 'lenses' that we used are great, but the subpoint language constrains allocation. For example, the Student Equity and Access lens should give many resource requests scores of 3, but 2/3 of the subpoints require that the request promote or lead to community engagement (and then there was a Community Engagement lens!). Why do we need this represented 3x? One could imagine that some of the requests might lead indirectly to community engagement, but many of the requests did not directly lead to community engagement, which necessitated a low score.
maintain as much as transparency as possible.
Clearly defining what is budgeted and additional request, including capital project request and instructional equipment in the prioritization process while also considering request deferred from the previous year is essential to planning.
There were some issues with the rubric. I think there needs to be more input from faculty on how items are prioritized.
Make the various decisions about prioritizations at the different levels transparent. Do not try to have a large group reprioritize what has been prioritized several times. Have program review writers think about initiatives that do not require resources. Make program review writers aware of the strategic plan on which their priorities will be evaluated. Allow the various groups/committees (e.g., Technology) to have a greater say in what is prioritized high.
Give Bob Miller more time.
A solid core of each constituent group is needed, especially representation by Faculty from all areas of campus, so experts are available to justify or explain specific requests. A balance of representatives from each area requesting funds would be ideal.
I think the sorted lists hadn't quite gelled yet. Some items felt very small-bore for college-wide consideration, while others were very big-ticket. If the whole college is going to be involved in this process, let's make the questions we're answering relevant to the entire college -- not so much "Should this program receive funding for this pet project," but "Should the college be pursuing this program at all". I also think the purpose and end use of the list should have been made clearer to those who had the task of filling it out. Some programs included items that they said were required to keep the program operating. Leaving those funding decisions up to the committee in that budget retreat seems to give the committee the right to decide if the program continues or not, and that didn't seem to be the point of the exercise. (Or was it?) I also think the scoring rubric didn't line up very well with the items on the lists. Some items included relevant information about underserved populations and access, but others left that out. Also, "Institutional Effectiveness" as a funding guideline was pretty weak -- none of the facilities/repair items scored very well on that guideline, but they seemed to have value as a college investment. We'll work this all out in time, I assume. In general it's been a very inclusive, all-college process, and I know that's a good thing.
It would be helpful to know how programs prioritized their requests and what other resources they have available. It was difficult to know if requests are for on-going activities or one-time. Some of the items are clearly being funded now (e.g. T of R band costs). Some descriptions did not include adequate information (e.g. request for supplies with no indication of the purpose or how much they already get for supplies)
Taskstream isn't the friendliest software, but I'm not sure there's anything better out there.
Shorter time frame or break session into two smaller 1.2 days.
This first one was a great start. I felt as I understood more of how we do things at our college. It was very good to have the upper management, classified, and faculty involved in the planning process.
The visual models are nice, but we need to have processes written so that everyone understands what they are and implements them in the same way. Then, when problems are identified, we'll know what to look for and can change the "instructions." If faculty are to play a meaningful role in budget development, we need to be given time for this. I do think we are making steps in the right direction.
I am getting a better understanding of the process finally by repeated presentations and the group work my program did together. The training from David Colley prior to our program planning was valuable-this training needs to be continued.
Would like to see requests include more information and coincide with the rubric. Maybe the authors need to go through the same exercises to understand how the process works and what the committees are looking for.
Planning process needs to be revised... this year was out of control.
Find ways to streamline the entire process so that it is more efficient and flows easier throughout the full cycle.
Faculty should get training on how budget decisions are made, so that when they request money in their annual Updates to Program Review, they understand the criteria upon which their request will be judged.