Campus Planning and Resource Committee (CPARC)

May 4, 2017
Charge

Consistent with Faculty Senate motion 31-16 (May 5, 2016), the Committee will assume certain responsibilities as successor to JTFSO and JTFRA:

- Undertaking, through a subcommittee established for this purpose, input on and review of the implementation of the annual budget process, including preparation of the FY18 budget, with a view to ensuring that the resource allocation system serves the purposes of aligning resources with values and goals, transparency, and consultation, and with recommending adjustments as needed;

- Fully integrating the work of the Joint Subcommittee on Administrative Costs and Services no later than the end of the Fall 2016 semester;

- Encouraging ongoing efforts to pursue campus-wide priorities, including, but not limited to, the campus’s Diversity Plan, plans for Internationalization, and an Outreach and Engagement Strategy.
Campus Budget Planning Process

- Insufficient feedback to departments on whether their plans and/or budgets have been approved at subsequent levels.
- Insufficient opportunity for departments and colleges to express their perspectives on the impacts of budgetary and trend changes.
- Confusion regarding what is due to whom, with whom discussions are to take place, and at what point these discussions will occur.
- Year to year budgets do not fully account for plans and budgetary commitments that are multi-year in nature.
- The planning and budget process currently focuses only on financial resources, but often space and facilities are critical to plans for improvement.
- Lack of clarity regarding the relationship between academic planning and unit planning for administrative and support services.
- Lack of clarity regarding what is represented in the process (central base funding only? internal college distributions?).
- Useful and timely discussion of the process and its results.
- Insufficient guidance on expectations for unit planning and budget proposals, and insufficient advice on how to focus on the useful and avoid busy work.
- Insufficient formal opportunities for student input.
Campus Budget Planning Process

Starting Point

1. Taking Stock
   - Review strategic plans and progress
   - Review approved FY plan
   - Appraise changes in situation (performance metrics, activity indicators, direct student feedback)

2. Setting the Context
   - Financial projections (campus and college, all sources)
   - Projected changes in activity
   - Implications of budget model information

Department Budget Plans

1. Resource Status
   - Capacity for basic quality and effectiveness
   - Changes in demand and resources

2. Review/Affirm Priorities for Improvement
   - From strategic plans
   - 1-3 year timeframe

College Roll-Ups

1. Resource Status Summary
   - Capacity for basic quality and effectiveness
   - Changes in demand and resources

2. Review/Affirm Priorities for Improvement
   - College-Level
   - Highlighted departmental/cross-unit

3. Prioritized resource requests
   - Proposed hiring plan (existing resources)
   - Campus strategic investment (inc. new faculty)
   - Corollary space and facilities requests

AA Roll-Up

1. Overall summary
2. Resources prioritized across academic and A&S units

Decisions and Outcomes

1. Approved and Funded FY Plans
   - Endorsed use of existing resources
   - Campus strategic investments
   - Approved hiring plan reflecting both integration with space and facilities planning

2. Endorsed Priorities for Improvement
   - College-Level
   - Departmental

A&S Units

1. Taking Stock
   - Review strategic plans and progress
   - Review approved FY plan
   - User feedback and other performance data

2. Setting the Context
   - Financial projections (campus and charges/RBB)
   - Projected changes in activity or service demands

Executive Area Roll-Ups

1. Resource Status
   - Capacity for basic quality and effectiveness
   - Changes in demand and resources

2. Review/Affirm Priorities for Improvement
   - From strategic plans
   - 1-3 year timeframe

Discussions and Feedback

1. Across A&S Units
   - Synergies
   - Validation of priorities

2. Across campus
   - Alignment with academic plans
   - Validation of priorities

Decisions and Outcomes

1. Across A&S Units
   - Synergies
   - Validation of priorities

2. Across campus
   - Alignment with academic plans
   - Validation of priorities

3. Prioritized resource requests
   - Campus strategic investment
   - Corollary space and facilities requests

Campus Planning And Resource Committee
Summary spreadsheets: 257 comments across 10 broad areas

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Survey Responses Binned to 6 Action Categories

1. Feed Data to the planned AQAD Process
2. Launch a new AQAD in a problem area
3. Get more information about a problem area
4. Talk to Relevant Administrators about issues presented
5. Areas where we need to develop performance metrics
6. Parking Lot – Things less urgent that need attention
Next Steps for CPARC

- “Look back” How did budget outcomes align with strategic priorities and campus values?
- “Look forward” Use feedback to recommend changes to the process
- Advise on the preparation for the NEASC re-accreditation self-study including re-visiting campus strategic priorities
- Continue discussion with groups engaged in other strategic planning