## 2020-21 Planning & Budget Committee Self-Assessment Report

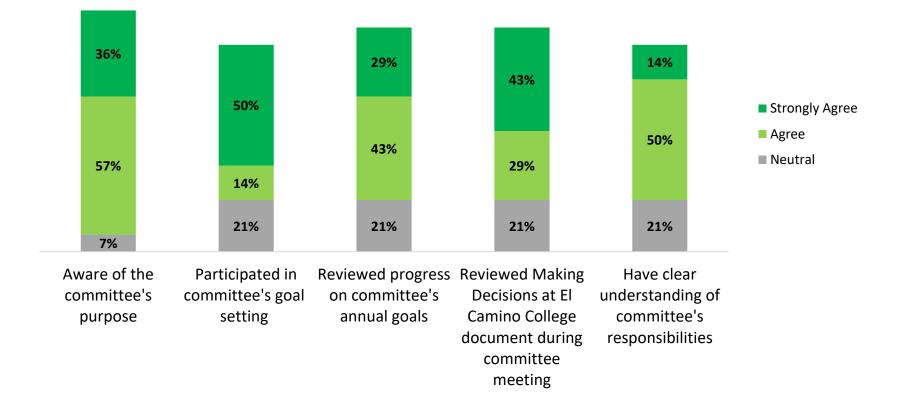
INSTITUTIONAL RESEARCH & PLANNING

### **Assessment Areas**

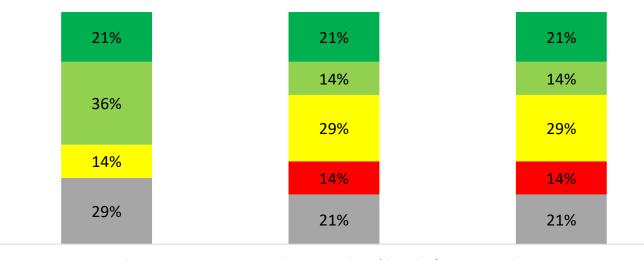
- 1. Purpose, Goals & Tasks
- 2. Committee's Functioning
- 3. Decision-Making Effectiveness & Communication

Response rate: 64% (14 out of 22 respondents)

## Purpose, Goals & Tasks Findings



## **Completion of PBC Goals**



Committee members review Strengthen members' level of Engage the campus community understanding & engagement in in discussions around funding planning & budgeting processes priorities & available resources to help performance/role

■ Not Sure ■ Not started ■ Partially Completed ■ Mostly Completed ■ Completed

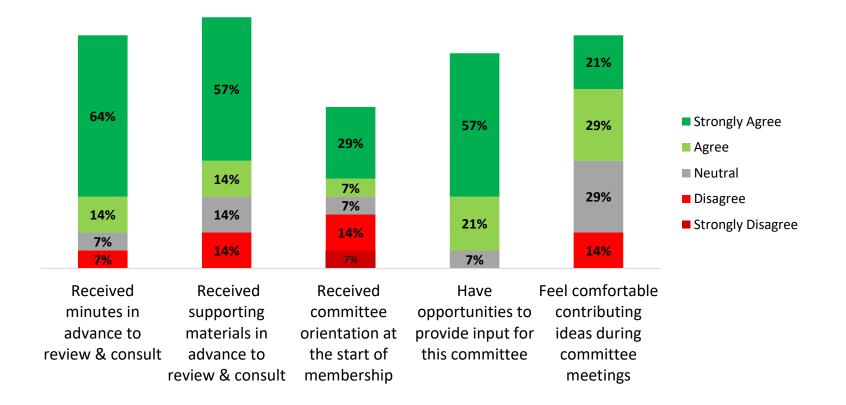
#### **Accomplishments Mentioned by Respondents**

- Reviewed self-assessment survey report and developed goals based on the survey.
- Reviewed PBC annual goals report.
- Reviewed and clarified new annual program planning and budgeting process. Co-chairs helped clarify the purpose and expectations of the new process.
- Agreed to end the meeting with verbal summaries to provide consistency in reporting PBC updates to constituent groups.
- Fiscal services survey results were informative. It would be greatly appreciated if improvements suggested in the survey are implemented (transparency, simpler system training, and easier to understand budget reports).
- Aligned PBC membership with *Making Decisions at ECC* document.

#### **Improvements Mentioned by Respondents**

- Define what "all campus-wide annual planning and budgeting issues" are within the PBC's scope of work.
- Review PBC membership as many committee members (e.g.: VPs) that used to participate in PBC did not come anymore, as the *Making Decisions at ECC* document did not list them as part of PBC.
- Review the budgetary process within annual planning related to replacement of items (Division supplies budget is not enough).
- Review annual planning timeline to ensure it is created with faculty input.
- Have PBC more involved in the process to allocate funds (American Rescue Plan).
- Focus on long-term planning and continual monitoring of key goals rather than annual review.

## **Committee's Functioning Findings**



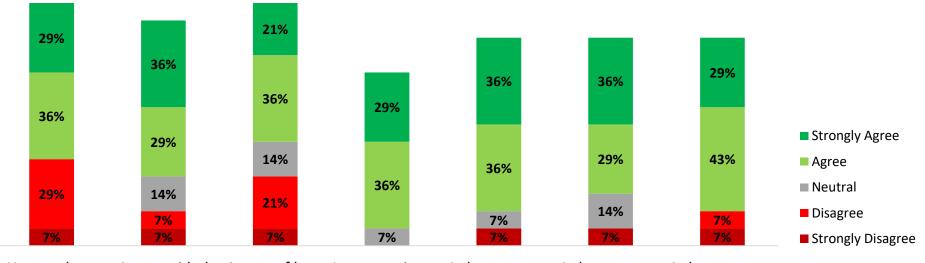
#### **Accomplishments Mentioned by Respondents**

- Solicited opinions and ideas from the committee.
- Developed a PBC Charter.
- PBC members participated more actively in meetings.
- Better organized PBC's agendas.

#### **Improvements Mentioned by Respondents**

- Ensure more coordination between co-chairs.
- Make more robust PBC members orientation.
- Bring to PBC more planning and budgeting training, specific to PBC members and their role to better participate in meetings.
- Continue encouraging more active participation from committee members.
- Clarify tasks of the committee throughout the year.
- Increase transparency and accuracy of responses to questions raised in PBC meetings.

# Decision-Making Effectiveness & Communication Findings



Aware of how I communicate At least once a At least once a At least once a Have a clear Am provided the resources decisions made decisions made vear, PBC vear, PBC understanding vear, PBC of how and on this on this discusses its reviews how reviews how committee information committee are committee to committee decisions are governance decisions are needed to communicated decisions are communicated my process make to other to ECC made constituents made committee ommittees decisions

#### **Accomplishments Mentioned by Respondents**

• There was open dialogue about budget cuts.

#### **Improvements Mentioned by Respondents**

- Bring to PBC greater understanding of the budget development process, its components, and purpose.
- Discuss how the budget reflects the District's mission, vision and priorities.
- Develop monthly budget updates so that PBC members can distribute among their constituents.



## Thank You Questions?