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Integrated Planning & Budget Model (IPBM)

[Presentation by Chancellor Jackson on IPBM](#)

[Click here](#) to go to the new IPBM District-wide Committee meeting information webpages.

If you would like to provide feedback on the IPBM process, please send an email to districtipb@clpccd.org. Beginning in 2014 we will establish a discussion board for comments.

The following documents are a result of comments and modifications from the CLPCCD community based on open forums held on the campuses and meetings with all constituency groups: DBSG 12/20/13, Administrator 1/10/14, Chabot Open Forum 1/30/14, District Open Forum 2/4/14, Las Positas Town Hall 2/5/14, DBSG 2/7/14 and DBSG 3/7/14.

[Click here](#) to view the draft redline versions of the documents that were changed based on feedback received from all the constituency groups.

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I. INTRODUCTION

The District Budget Study Group (DBSG) held its initial meeting for the academic year 2013-14 on September 6, 2013. During the course of this meeting the new Chancellor, hired in July 2013 raised the question of the district's procedures for integrating the budget with the planning processes conducted at the campuses. Based upon the discussion that

ensued it was agreed that a subcommittee of the DBSG would be formed to address the lack of a "formal" budget integration process to include the campuses, the district service centers and Maintenance & Operations.

This ad-hoc group would be called the Chancellor's Work Group (CWG) and would meet in lieu of the full DBSG during the fall semester to establish the parameters and guiding framework for the district-wide integrated planning & budget process (IPB). The meeting notes for this committee are attached as reference ([Attachment 1](#)). The CWG membership as well as the committee's charge and timeline are also included as [Attachments 2](#) and [Attachment 3](#).

In order to expedite the process, a subcommittee of the CWG was formed to conduct the preliminary review of IPB plans from the following seven colleges and districts:

1. Coast Community College District "Adopted Budget Allocation" ([Attachment 6](#))
2. Gavilan Joint Community College "Linking Program Review and the Annual Budget for Better Outcomes" presented at the Spring 2008 Conference of the Association of College Business Officials (ACBO), May 18, 2008 ([Attachment 7](#))
3. Kern Community College District, "Budget Allocation Model: BAM" presented at the ACBO Spring 2008 Conference, May 19, 2008 ([Attachment 8A](#), [Attachment 8B](#), [Attachment 8C](#))
4. Los Angeles Community College District Budget Allocation Model, presented at the ACBO 2008 Conference, May 19, 2008 ([Attachment 9A](#), [Attachment 9B](#))
5. Los Rios Community College District, "Budgeting Principles and Formulas" ([Attachment 10](#))
6. Peralta Community College District, "Budget Allocation Model" ([Attachment 11A](#), [Attachment 11B](#), [Attachment 11C](#))
7. Skyline College, "Balanced Scorecard", Fall 2007, Office of Planning, Research and Institutional Effectiveness ([Attachment 12](#))

Also included in the subcommittee's review was the CLPCCD district report from School Services of California, Inc (SSCal), "Survey of Campus Budget Allocation Models". This report was completed in 2010 and was used to inform the current budget allocation model (BAM) adopted in FY 2012-13; with initial implementation slated for FY 2013-14 ([Attachment 4](#) and [Attachment 5](#)). The SSCal report addressed the question: What models are multi-campus districts using to allocate budgets to their campuses? The districts surveyed included:

- Foothill-DeAnza Community College District
- Kern Community College District*
- Los Angeles Community College District*
- Los Rios Community College District*
- Rancho Santiago Community College District
- San Diego Community College District
- San Mateo Community College District, and
- Yuba Community College District

As noted above with the asterisk (*), there was a duplication of three colleges from the original report by School Services and those reviewed by the CWG. In total, twelve different colleges and districts informed the recommendations contained herein as part of the CLPCCD Integrated Planning and Budgeting (IPB) process.

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II. BACKGROUND

In November 2009, the Accrediting Commission for Community and Junior Colleges (ACCJC) conducted a comprehensive site visit at the two colleges in the Chabot-Las Positas Community College District (CLPCCD): Chabot College and Las Positas College.

The ACCJC made the following recommendation under Standard IIIB.

“To meet the standards, the team recommends that the district and the college complete the evaluation of the resource allocation process in time for budget development for the 2010-2011 academic year, ensuring transparency and assessing the effectiveness of resource allocations in supporting operations”.

On September 4, 2012, the Accrediting Commission for Community and Junior Colleges notified the Chabot-Las Positas Community College District that after its review of the district’s Annual Fiscal Report (AFR), the District had been identified as having a potential financial risk. The reasons for the review were negative ending balance and significant enrollment loss.

In October 2012, Chabot College and Las Positas College submitted the Midterm Reports outlining the Progress Made, Analysis of Results Achieved, and Evidence, as required for a Midterm Report. The ACCJC accepted the reports from both colleges.

Evidence:

Chabot College Evaluation Report - College/District Recommendation 1 & 2

<http://www.chabotcollege.edu/accreditation/documents/AccreditationEvaluation.pdf>

ACCJC Letter of Acceptance of Mid-Term Report from Chabot College

<http://www.chabotcollege.edu/accreditation/letter.asp>

Las Positas College Mid-Term Report – College/District Recommendation 1 & 2

http://www.laspositascollege.edu/accreditation/documents/01MidtermReportLPCFinal_10-15_12_withlinks.pdf

ACCJC Letter of Acceptance of Mid-Term Report from Las Positas College

<http://www.laspositascollege.edu/accreditation/documents/AccredMidtermLetter2-12-13LPC.pdf>

On December 18, 2012, the ACCJC notified the CLPCCD that the Financial Review Team had met and conducted an in-depth analysis of the institution’s financial reports. The Team recommended that the District provide a Special Report to the Commission. On February 5, 2013, the ACCJC requested that the Special Report be provided to the Commission by April 1, 2013. The purpose of the Special Report was to develop a long range budget plan to address deficit spending and low reserves.

Progress

Since the writing of the Midterm Reports there has been another Joint Consortium meeting and several DBSG meetings held. The Interim Chancellor held a Joint Consortium Special Meeting on September 11, 2012 with Chancellor’s Cabinet, Chancellor’s Council and the DBSG. The purpose of the Consortium meeting was to create values (how we are going to heal ourselves and each other) that will be used as we work together throughout the year on various issues including the crafting of a Budget Allocation Model, and of CLPCCD, given the changes happening in higher education. The values and compelling statements from this work were carried forward as the DBSG continued to meet.

Evidence

<http://www.clpccd.org/board/Chancellor.php>

The DBSG met on October 26, 2012; November 16, 2012; December 7, 2012;

January 25, 2013, February 8, 2013; and March 15, 2013.

Evidence

<http://www.clpccd.org/business/BusinessServicesDistrictBusinessBudgetStudyGroup.php>

Response to Financial Review Team Recommendation

Long Range Budget Plan

At its meeting on March 15, 2013, the DBSG approved and adopted a Funding Allocation Model (Attachment [13A](#) and [13B](#)) to be utilized in the development of a 3-year budget cycle starting with fiscal year 2013-14. A vote was taken with 20 yes, 3 no and 3 abstained.

This model was recommended to the Chancellor, who in turn recommended it to the Board of Trustees at its March 19, 2013 meeting.

Recommended Action: The Board of Trustees approves the Funding Allocation Model recommended by the District Budget Study Group (DBSG) and the Chancellor. This approval is a commitment to a three (3) year budget cycle from 2013-14 to 2015-16 and is to be reviewed annually.

By this recommendation, the Board authorizes the Chancellor to develop Board Policy and Administrative Procedures utilizing the appropriate shared governance processes to implement this model beginning FY 2013-14. The Board also authorizes the Chancellor to conduct an external study of District Operations (District Office and Maintenance & Operations) to determine the appropriate size of District operations to support the Colleges. This study is to be completed within the FY 2013-14.

The Board of Trustees unanimously approved the Funding Allocation Model recommended by the District Budget Study Group (DBSG) and the Chancellor. Adoption of the new model provides the District with the financial tool for long-range budget planning that addresses deficit spending and low reserves. This approval is a commitment to a three (3) year budget cycle from 2013-14 to 2015-16 and is to be reviewed annually.

Evidence:

Draft minutes of March 15, 2013 DBSG meeting

<http://www.clpccd.org/business/BusinessServicesDistrictBusinessBudgetStudyGroup.php>

Draft minutes of March 19, 2013 Board meeting

<http://www.clpccd.org/board/BoardAgendaArchives.php>

Deficit Spending

The District has reversed its deficit spending as shown in [Attachment 14](#). For the 2012-13 fiscal year, district revenues are more than expenditures by about \$1.7 million. The two (2) main reasons for the reversal in deficit spending are: 1) expenditure reductions made by the district and 2) the passage of Proposition 30 and avoidance of mid-year trigger cuts.

Evidence:

Board Presentation - Budget Update for FY 2012-13 & New Allocation Model

<http://www.clpccd.org/business/documents/AllocationModelUpdate3-5-13BoardMtng-BoardPosting- Revc.pdf>

Reserves

The District Reserve is now projected at \$7.6 million or about 8.37% of expenditures as shown in [Attachment 15](#). And with the district no longer deficit spending, the reserve is expected to increase above its current level. The new Funding Allocation Model also incorporates a process by which reserves can be increased district-wide and by location (College, District Office and Maintenance & Operations).

Evidence:

Board Presentation - Budget Update for FY 2012-13 & New Allocation Model

[http://www.clpccd.org/business/documents/AllocationModelUpdate3-5-](http://www.clpccd.org/business/documents/AllocationModelUpdate3-5-13BoardMtng-BoardPosting- Revc.pdf)

[13BoardMtg-BoardPosting- Revc.pdf](#)

March 15, 2013 Meeting Minutes

<http://www.clpccd.org/business/BusinessServicesDistrictBusinessBudgetStudyGroup.php>

March 19, 2013 Meeting Minutes

<http://www.clpccd.org/board/BoardAgendaArchives.php>

The new Funding Allocation Model provides the district with a financial tool that gives the following:

- Treats all employees fairly
- Simple to understand
- It is Revenue Based
- Puts money out to Colleges
- The College Budget Committees are empowered to make decisions
- We are all responsible to live within our means
- Promotes accountability and transparency district-wide
- Incorporates a process to build back our RUMBL and Reserve
- Addresses ACCJC Accreditation Recommendations

The following is the DBSG Committee composition and the constituencies they represent. A step-by-step narrative and the accompanying calculations are shown in Attachment 13.

Chancellor's Executive Staff:

Judy E. Walters – Interim Chancellor
 Jeffrey Kingston – Vice Chancellor, Education Planning
 Lorenzo Legaspi – Vice Chancellor, Business Services
 Wyman Fong – Vice Chancellor, Human Resources
 Susan Sperling – President, Chabot College
 Kevin Walthers – President, Las Positas College

District Budget Study Group

Judy Walters - Interim Chancellor-Ex Officio
 Lorenzo Legaspi - V.C. Business Services
 Barbara Yesnosky- Director - Business Services
 Tim Nelson - Director - M&O
 Judy Hutchinson - Budget Officer - Ex Officio
 Joanne Bishop-Wilbur - Classified Senate
 Pedro Ruiz DeCastilla - Classified
 Linda Wilson – SEIU
 Pushpa Swamy – Business Operations Coordinator
 Kevin Walthers - Presidents- Ex Officio
 Susan Sperling - Presidents- Ex Officio
 Designee - Natasha Lang - V.P. Business Services
 Connie Willis - V.P. Business Services
 Janice Noble - V.P Academic Services
 Dale Wagoner (Interim) - V.P Academic Services
 Diana Rodriguez - V.P. Student Services
 Gerald Shimada (Interim) - V.P. Student Services
 Dave Fouquet - Faculty Association
 Kathy Kelley - Faculty Senate
 Charlotte Lofft - Faculty Senate
 Ming-Lun Ho - Faculty Senate
 Yvonne Wu-Craig - Classified Senate
 Gordon Watt - Classified
 Andrea Preciado- Student
 LaVaughn Hart - Faculty Association
 Sarah Thompson - Faculty Senate
 Bob D'Elena - Faculty Senate

Justin Garoupa - Faculty Senate
 Todd Steffan - Classified Senate
 Heidi Ulrech - Classified
 Sundeep Sidhu- Student

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III. A Collaborative Process

The IPB process outlines the partnership between the district and the Colleges in order to identify budget guidelines derived from several planning documents. These planning documents include the colleges' educational master plans, colleges/district technology plans, facility plans, strategic goals established by the Board of Trustees, as well as other goals or board priorities that may require resource allocations that do not fall under one specific category. In developing the budget, resources will be allocated to the extent that funds are available taking a conservative approach to allocation of funds.

In developing the final budget the first priority is to allocate sufficient resources to maintain those functions that support the mission of the colleges and the district so that high quality instructional services can be offered to students. The district recognizes that there are a number of permanent fixed costs that exist, these expenditures are identified in "STEP #3A" which represents those commitments and contractual obligations that support district-wide commitments:

<u>List of STEP 3A expenses</u>		<u>FY 13-14</u>
District-wide:		
RUMBL	\$	5,799,993
SERP	\$	749,677
	\$	6,549,670
District Office:		
Property & Liability Insurance	\$	590,100
Board Member Compensation	\$	116,590
Chancellor (Contract for Svcs)	\$	12,000
Annual Audit	\$	90,300
Telephone	\$	54,000
EAP & SAP	\$	8,000
Fingerprinting	\$	7,920
TB exams	\$	8,000
Convocation	\$	3,000
	\$	889,910
Maintenance & Operations:		
Electricity	\$	1,285,275
Natural gas	\$	510,000
Water & sanitation	\$	436,217
Fuel	\$	78,500
Disposal Services	\$	35,000
Security services for Franklin Bldg	\$	11,700
Licenses & permits	\$	5,500

		2,362,192
Campus Operations		
Reassigned Time	\$	217,291
Subsidized Program Units (Nursing/DH,etc.)	\$	575,000
	\$	792,291
Total expenses in STEP 3A	\$	10,594,063
Less Campus Operations	\$	(792,291)
Plus Transition Funding	\$	850,000
Total expenses in 3A less Campus Operations Plus Transition Funding	\$	10,651,772

In keeping with the alignment of college and district goals the Chabot Las Positas Community College District (CLPCCD) Board of Trustees adopted the following mission statement on April 16, 2013

The Chabot-Las Positas Community College District (CLPCCD) prepares students to think critically, engage socially, and acquire workplace knowledge and educational skills in order to contribute ethically as citizens in a Global Society.

The Las Positas College mission statement was also adopted on April 16th:

Las Positas College is an inclusive learning-centered institution providing educational opportunities and support for completion of students' transfer, degree, basic skills, career-technical, and retraining goals.

Chabot College has also updated its mission statement and is currently in the college review process and the final statement should be approved in spring 2014.

The following functional charts outline the campus and district allocation processes.

Diagram 1. [Chabot College Integrated Planning & Assessment Diagram](#)

Diagram 2. [Las Positas College Integrated Planning & Assessment Diagram](#)

Diagram 3. District Service Centers (In Progress)

Diagram 4. [DRAFT-Integrated Planning & Budget Model](#)

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IV. GUIDING PRINCIPLES of the Integrated Planning and Budgeting (IPB) PROCESS

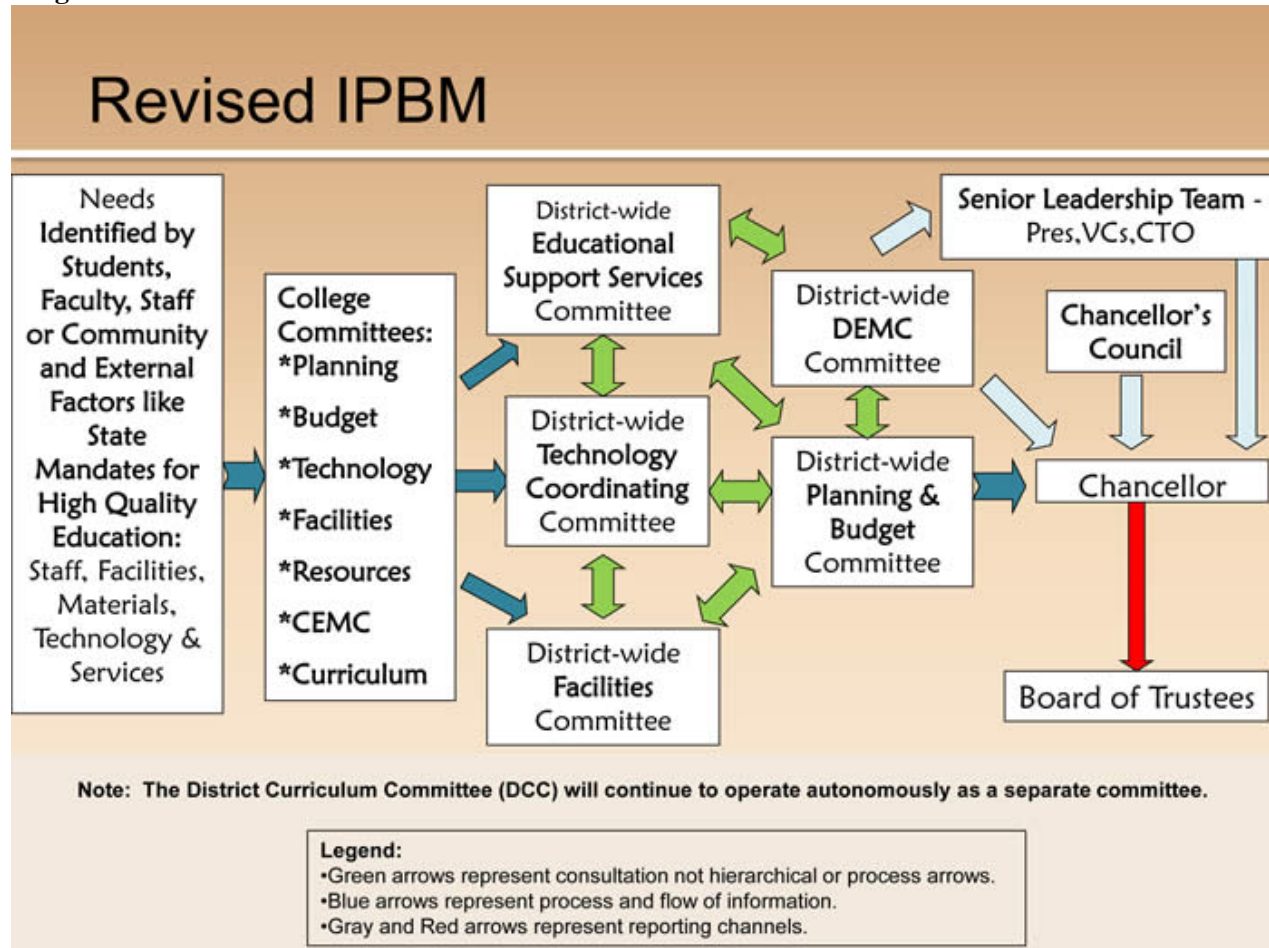
In an effort to increase communication, provide transparency and develop trust in the process the Chancellor's Work Group (CWG) established the following guiding principles in the development of this IPB model.

- Educational planning and needs should be the foundation of all decision-making and should be in alignment with the colleges' and district educational missions.
- College planning should be the primary determinant for establishing shared governance recommendation.
- Be easily understood and provide a forum for shared participation in the decision-making process.
- Insure educational planning, student needs and assessment of Key Performance

Indicators (KPIs) are the foundation of all budget decision making.

- Provide a written narrative of the Integrated Planning and Budget (IPB) process and the Budget Allocation Model (BAM) in order to memorialize the process.
- Provide consistency in the allocation of funds in order to promote transparency and the integration of planning into the budgeting process while maintaining alignment with the State of California's SB 361 funding model.
- Provide clear accountability amongst all stakeholders on roles and responsibilities and establish a periodic review and assessment of the process to make recommendations for improvement.
- Provide for autonomous decision making at the college level while using the college planning process as the primary source for determining shared governance recommendations.
- Provide a clear path from recommendations to consideration in the decision-making cycle in order to integrate policy, planning and budgeting across all major areas.
- The current district committees for District Enrollment Management Committee (DEMC), District Curriculum Committee (DCC), and the Academic Calendar Committee will continue to operate autonomously as separate committees.

Diagram 4



DISTRICT-WIDE COMMITTEES

[District Educational Support Services Committee](#)
[District Facilities Committee](#)

[District Planning & Budget Committee](#)
[District Technology Coordinating Committee](#)

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V. Guiding Principles of the District Wide Committees

1. The role of district-wide committees is to provide uniform data, assure consistent processes, and to encourage and promote coordination and communication. The Colleges are the primary source because they are closest to student needs and have educational expertise to strengthen student success, completion and equity in alignment with the district and colleges' educational missions.
2. There needs to be a clear flow of communication between committees so that the development of recommendations is transparent and logical. Additionally, some recommendation(s) cross committee boundaries and clear communication ensures the recommendations are developed in the spirit of transparency and there is a logical process for review.
3. This IPB process provides a clear path from recommendation(s) inception to consideration/enactment in the decision-making cycle in order to integrate policy, planning and budgeting across all major areas.
4. All decisions and minutes shall be documented and publicized widely, using all available means. This ensures effective communication to colleges and constituencies.
5. The Planning and Budget Committee has the authority to make recommendations to the Chancellor and to make recommendations on initiatives proposed by the Chancellor. The Chancellor on behalf of the Board, and/or the Board Chair, provides a response to advisory and constituency bodies if the recommendations are not adopted or are substantively modified.
6. All committees have the right to make recommendations directly to the Chancellor and Board of Trustees. No committee can veto a recommendation; however comments and/or modifications are encouraged in order to promote widespread support. The committees will regularly evaluate and assess the effectiveness of their processes, identify areas for improvement and make recommendations where appropriate.
7. The PBC is charged with using a district-wide viewpoint of what is best for the organization as a whole.
8. There needs to be consistency of membership to ensure the ability to function as a team in making tough decisions. Therefore, alternates are not allowed. Decisions will continue to be made if members are absent and they cannot challenge decisions made in their absence. If a member misses three sessions, the PBC will ask the appointing group to name a replacement, but the appointing group can only do this once during a term to avoid a loss of continuity and efficiency.
9. The initial term of membership will be two years to allow the system to be developed and run effectively before a new slate of members is installed. This allows for continuity and the development of a collaborative practice. Members are allowed to miss three meetings with no penalties; additional absenteeism will allow the appointing body to select a new member for the remainder of the term.
10. Start with a retreat to review the Chancellor's and Board's goals at the beginning of the year. This will help ensure a common direction and focus across the committees.

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VI. Consensus Decision Model

The recommended decision model has three key elements:

1. All decisions are documented: Every recommendation will be documented in detail and forwarded to the Chancellor.
2. Primary Decision Rule is through “Consensus”: The PBC is charged with developing district-wide recommendations that best serve students and the community using evidence-based processes and criteria. Therefore, it recommended that the PBC work towards solutions that are based on the results of such agreed-upon processes and criteria, and the “consensus” decision model. Consensus is achieved when all members of the group rate a proposal as A, B or C:
 - A: *Unqualified support*
 - B: *Acceptable* – best of the options we have
 - C: *Can live with the decision* – not especially enthusiastic but the process was followed and all viewpoints received a fair hearing. If all members do not indicate A, B, or C the group can continue to refine the proposal if there is sufficient time to do so to arrive at consensus. Consensus can also be achieved if a majority of the group indicate A, B, or C, and the remaining members indicate:
 - D: Do not fully agree with the recommendation but feel the process was followed; need to have my viewpoint included in the documentation as a minority report
3. Voting is the Back-up Process: If consensus cannot be reached within the time constraints of the planning-budgeting cycle, the PBC will vote on the issue. However, voting will not be used to achieve a decision based on a majority of votes, but rather as a method of recording committee members’ assessment of proposals. The full record of the vote including any alternative viewpoints will be documented and sent to the Chancellor.

Support for Effectiveness

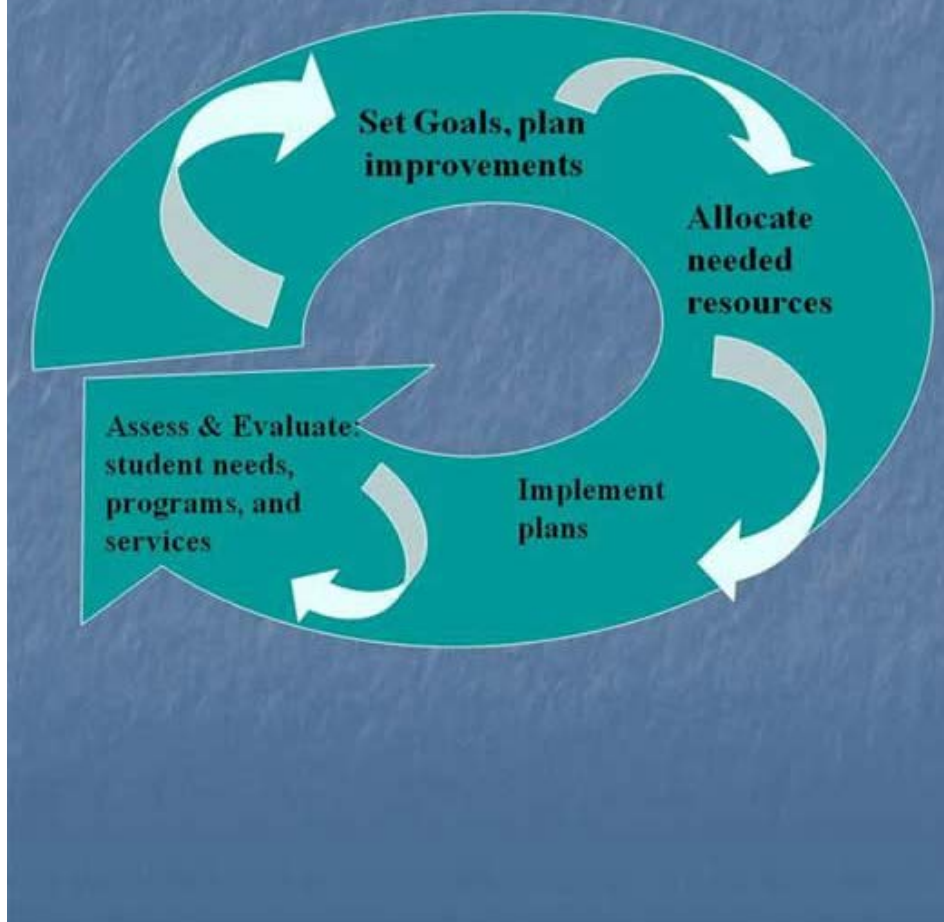
The district will provide support for the PBI. This includes providing appropriate technical support (e.g., research, policy) and logistics and minutes.

The goal is to have fewer, more highly supported action meetings at key decision-making milestones, rather than more frequent discussion-oriented sessions.

An important support for effectiveness is to institute a regular review of district and college implementation successes and challenges, i.e., an assessment of whether previous year plans are being acted upon using agreed upon matrices or established rubrics. The following cyclic evaluation planning and improvement diagram provides a macro overview of the process.

Diagram 5

Cyclical Evaluation, Planning, and Improvement



VII. College Planning

Each college is responsible for its planning and shared governance processes. With this in mind, the CWG recommends that each college conduct a process to assess, strengthen and streamline their local governance processes. This would allow the colleges to ensure a solid foundation for planning decisions that will move through the district-wide planning and budget integration process. Such a review would also provide an opportunity for the colleges to consider changes that might help to align their efforts with the IPBM.

VIII. District Support Services Planning

Similar to the college's program review process, each district service area is responsible for its planning and budgeting in order to effectively support the CLPCCD's mission and to provide services to the campus sites. The district planning and budgeting process will be aligned with the established budget calendar prepared by the Planning & Budgeting Committee (PBC) and each senior administrator is responsible for completing an annual service area report.

Prior to review by the appropriate district wide committee, the chancellor (in collaboration with the district senior executive staff) will consolidate and prioritize the requests.

Whenever possible, decisions will be data-driven to insure equity, accountability and transparency. Service area plans will identify needed resources to include, but not limited to equipment, personnel, facilities and/or technology.

IX. Review and Update

The Chancellor's Working Group (CWG) will review the overall effectiveness of the implementation of this document after one year.

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