

DRAFT

Long-Range Financial Plan Scenario Planning Sessions

April 11, 18, 19* 3:00 – 5:00 p.m., Center for Meeting and Learning room 214

*April 19 session will be live streamed

Outreach/communication:

-Email to councils, D&D, CSLT, P2P

-Post to web

-Post in weekly

-Other?

Materials:

-planning framework

-budget principles, criteria and data elements

AGENDA

I. Welcome & Framing

Introductions

Objective of today's session– develop meaningful systems and tools for strategically addressing budget scenarios at Lane as part of the long-range financial plan

What do we do when enrollment surges or state funding increases substantively?

What do we do when facing chronic budget shortfalls?

Work to date- remind participants of the work to date and timeline

Note: living plan; work will continue into next year and ongoing

II. Data Elements

III. Investment principles and criteria

IV. Reduction principles and criteria

Budget Principles, Criteria and Data Elements

The budget principles, criteria and data elements presented on the following pages are part of Lane’s Long-Range Financial plan. They are used regularly by departments, programs and services to inform planning and budgeting at the unit level. In addition they are used by committees allocating resources such as student technology fee and Perkins grants. In the event of budget or program reductions these elements will inform those decisions.

Data Elements¹

Enrollment, student success, staffing and financial data elements are accessible and applied in **annual department planning** (previously called unit planning), **program review**, and in **budget development**. In addition to addressing standard data elements, departments are encouraged to identify key data/performance indicators that are most meaningful to their specific context and activity.

INSTRUCTIONAL PROGRAMS

Criteria	Data Element
Enrollment – demand	5-year Enrollment History; future trends
Program – Discipline cost	Cost per FTE; revenue; comparisons with selected Oregon colleges
Retention	Student Persistence at the institutional level; course completion
Capacity – Utilization	Capacity Analysis – class fill rate; student: faculty FTE
Essential courses required for degree/certificate	Student enrollment in required courses
Availability of jobs (for CT programs)	Employment Department data
Wages (for CT programs)	Employment Department data
Job Placement (for CT programs)	Employment Department data

STUDENT SERVICES

Criteria	Data Element
Enhances Student Engagement	Number of service contracts Number of unduplicated participants Demographics of individuals served Other evidence of enhancing engagement
Enhances Student Learning	Enhanced student persistence Enhances one or more CCSSE benchmarks Other evidence of enhancing learning

¹ From Lane’s current long-range financial plan

Data Elements (continued)

STUDENT SERVICES (continued)

Criteria	Data Element
Enhances Student Satisfaction	ACT Satisfaction data CCSSE satisfaction data Other evidence of enhancing satisfaction
Requirement for Service	Essential to completing a business process with students Essential to an effective educational experience Legally mandated
Uses resources efficiently	Comparison of faculty/staff to student ratios to national association standards and best practices. Develop appropriate institutional benchmarks Demand/capacity analysis (i.e., waitlists, complaints about access, etc.) Total general fund budget Budget from other sources (i.e., student fees, grants, etc.) Other evidence of efficient use of resources

COLLEGE SERVICES

Criteria	Data Element
Service is essential to operation of the institution	Consequences of not having service Citation(s) for legal requirements (e.g. governing ORS, federal code, IRS and audit requirements)
Cost of service	Total General Fund support for service (offset by service charges) Service charges and other revenue that offset GF support Revenue directly provided to GF by service
Service is cost effective	Comparison to industry standards (e.g. housekeeping sq. ft./staff FTE, # of desktops/IT technician). Develop appropriate institutional benchmarks Cost comparisons with similar outside services Cost savings for college compared to cost of service
Service is utilized	Customer counts Service logs Number of transactions

Discussion Activity:

Break into groups based on affiliation (instructional, student services, college services).

Questions:

- Are any of these data elements unclear?
- Are any of these data elements not meaningful in a standard assessment?
- What additional data elements should be included in a standard assessment?

Budget Principles & Criteria²

Budget planning at Lane will be guided by the following:

General principles:

1. Budgets will focus on furthering the college mission
2. Budgets must meet legal, contractual, accreditation obligation
3. Budgets must meet board policies and involve as much input from the college community as possible
4. Benchmark to best practices while recognizing intentional variations between Lane and national norms.
5. Using data and objective criteria in planning and resource allocation.
6. Maximize investment in technology or streamlined work processes that will save resources.

Prioritizing principles:

1. Budget planning will be guided by the college strategic plan, unit plans, council plans and other planning efforts
2. Support student enrollment, retention, success, and learning, while minimizing negative impact of budget constraints on quality of student services, instruction and college infrastructure
3. Maximize revenue generation balanced with accessibility and affordability
4. Invest in new activities that maximize future revenue
5. Maintain existing facilities and equipment well and upgrade as needed
6. Maintain ability to respond to community needs
7. Avoid involuntary layoffs of permanent employees

Additional considerations:

Availability of the program or service elsewhere

² From Lane's current long-range financial plan

Investment Principles & Criteria

Prioritizing principles:

1. Budget planning will be guided by the college strategic plan, unit plans, council plans and other planning efforts
2. Support student enrollment, retention, success, and learning, while minimizing negative impact of budget constraints on quality of student services, instruction and college infrastructure
3. Maximize revenue generation balanced with accessibility and affordability
4. Invest in new activities that maximize future revenue
5. Maintain existing facilities and equipment well and upgrade as needed
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7. Avoid involuntary layoffs of permanent employees

Additional Ideas:

Adapted from faculty position requests, one-time funding, LaneStarter

- Program review has been completed and an implementation plan is approved
- Alignment with program goals expressed in annual department planning
- Alignment with one or more of the college's strategic directions
- Requirement for external accreditation
- Support of critical/demonstrated local or regional workforce need
- Support of critical student success functions
- Increased enrollment
- Measurable, sustained return on investment; college impact
- Strength of concept; strength of plan

Discussion Activity:

Break into groups (if more than one table)

Questions:

- What other principles and criteria should be considered when making investment decisions?
- How can these principles and criteria be **stated, organized** and **applied** to support clear, transparent, consistent investment decisions?

Reduction Principles & Criteria

Prioritizing principles:

1. Budget planning will be guided by the college strategic plan, unit plans, council plans and other planning efforts
2. Support student enrollment, retention, success, and learning, while minimizing negative impact of budget constraints on quality of student services, instruction and college infrastructure
3. Maximize revenue generation balanced with accessibility and affordability
4. Invest in new activities that maximize future revenue
5. Maintain existing facilities and equipment well and upgrade as needed
6. Maintain ability to respond to community needs
7. Avoid involuntary layoffs of permanent employees

Additional considerations:

Availability of the program or service elsewhere

Discussion Activity:

Break into groups (if more than one table)

Questions:

- What other principles and criteria should be considered when making reduction decisions?
- How can these principles and criteria be **stated**, **organized** and **applied** to support clear, transparent, consistent reduction decisions?