

Academic Senate Budget & Long-Range Planning Committee (BLRPC)

Final Report 2008

Submitted June 23, 2008

Frank Vuotto, BLRPC Chair and Academic Senate Vice Chair

Budget and Long-Range Planning Committee 2007-2008 Membership*

Name	Department	College	Office Phone
Conn, David	AcadProgs	ADMIN	62246
DeMers, Jerry	Kines	CSM	62591
Derelian, Doris	FSN	CAFES	66130
Freed, Tali	IndEng	CENG	62544
Hill, Margarita	LandArch	CAED	61319
Ikeda, Kimi	AcadAffrs	ADMIN	62186
Magnusson, Shirley	TchrEd	COE	66420
Ramirez, Rick	AFD	ADMIN	62091
Vorst, Keith	IndTech	OCOB	61765
Vuotto, Frank (Chair)	Library	PCS	66247
Marre, Adam	Student	ASI	61291
VACANT		CLA	
VACANT	AcadAffrs	ADMIN	

*For complete details visit <http://www.calpoly.edu/~acadsen/commmemb.html>

Introduction and Background Information

The BLRPC has not played an active role in budget planning for several years. As a result, the Chair of the Academic Senate, Bruno Giberti, has charged the committee to reflect on its role and to identify specific charges, functions, goals and responsibilities.

The official BLRPC current responsibilities are posted on the Academic Senate Website¹:

(1) The Budget and Long-Range Planning Committee shall provide oversight and make recommendations concerning policy for the allocation of budgeted resources. This includes the review of matters related to the allocation of budgeted resources and representation on bodies formed to review the mechanisms by which campus-wide resource allocations are made.

(2) In addition, the Budget and Long-Range Planning Committee shall also develop recommendations concerning future actions, policies, and goals of the University. Areas assigned to specific standing committees of the Academic Senate fall within its purview when future predictions and extreme long-range planning are necessary or possible.

¹ <http://www.calpoly.edu/~acadsen/CommResponsibility.html> Retrieved 10/09/07

Provost Meeting - Highlights

During the summer of 2007, Bruno Giberti, Senate Chair, Frank Vuotto, Senate Vice Chair & BLRPC Chair, and Bill Durgin, Provost, met to re-examine and reflect on the role and responsibilities of the BLRPC.

Here are some of the highlights of that meeting:

The fundamental function of the BLRPC is to serve as a deliberative body of the faculty on budget and resource use for annual and long-range planning issues. The committee is advisory in nature and provides consultation to the Provost in budget-related matters. Collaboration, through discussion, keeps channels of communication open, ensures a faculty voice in budget matters, and provides transparency to the strategic and budget planning process.

It is important to distinguish between perennial responsibilities and long-range goals and strategies. In that respect, the following areas are recommended for immediate consideration:

- Assist the Provost in developing campus funding formulas based on an analysis of total expenditures for each college
- Recommend methods to determine the per-unit teaching costs for every department/college
- Suggest strategies to help identify expensive programs and the possibility of increasing/redistributing resource allocations
- Collaborate with the Provost to appoint task groups to establish fiscal priorities for Cal Poly as they relate to faculty
- Assist the Provost in aligning financial needs and allocations with the University's strategic planning and vision statements

Long-range goals are recommended to include the following points:

- Contribute and advise on the ongoing strategic and budget-planning process
- Cultivate consensus among faculty in regard to needs, priorities and allocations
- Provide opportunities for the BLRPC Chair to report to the Senate
- Assist Larry Kelley in developing an annual report to the Senate
- Continue to inform and educate Senators on the budget and its development

Fact-Finding and Information Gathering

In an effort to become familiar and informed in BLRPC-related issues the chair implemented a five-point strategy:

1. *Conduct One-On-One Meetings with BLRPC Members* – The chair met individually with many of the BLRPC members during the Fall 07 Quarter to

- record/document members' perspectives and to secure relevant information². Additionally, the chair met with past BLRPC chair, Steve Kaminaka, to gain a historical framework of the committee's evolving role.
2. *Review Past Resolutions* – The Chair reviewed and examined past resolutions authored by the committee from 1976 to present.
 3. *Secure and Review Charges and Responsibilities from other CSU AS Budget Committees* – The Academic Senate office secured official charges for all CSU budget committees.
 4. *Evaluate the Quality, Completeness and Transparency of Budget Information Dissemination Online* – The Chair assessed the quality – and quantity – of budgetary statistics and data from a variety of authoritative sources³.
 5. *Determine the Role of the University Planning and Budget Advisory Committee (UPBAC)* – UPBAC was originally created to help inform faculty during the California budget crisis in the 1990s and has not met for several years. UPBAC has never been, nor will ever be, a contributor in the decision making process for budget planning.

The Impact of Technology

Recent technologies have changed how budget information is reported and disseminated. Online availability of budget information has allowed a new level of transparency – and scrutiny – to emerge. Cal Poly, CSU, and the California Department of Finance, to name a few, post a wide-range of budget data.

In addition, budget reports and updates issued from Larry Kelley and the Provost are regularly sent out via email to the campus community.

Finally, Larry Kelley and the Provost regularly report to the Senate on budget-related issues and provide copies of the report to the Senate office (generally, a PowerPoint presentation).

BLRPC Meeting on February 13, 2008

The Committee agreed that money and funding issues are deeply woven into most discussions on campus. There was general consensus that the BLRPC should not be dissolved and should continue to seek opportunities that contribute to budget and strategic planning.

The following items were identified as potential projects:

- Determine and clearly communicate the role of Deans and Department Heads in assigning allocations and budget lines. Currently, colleges at Cal Poly

² Larry Kelley, David Conn, Rick Ramirez, Kimi Ikeda, Jerry DeMers, Tali Freed, Margarita Hill, Shirley Magnusson, and Keith Vorst.

³ <http://www.afd.calpoly.edu/Budget/default.htm>; <http://www.lao.ca.gov/>; <http://www.calstate.edu/as/>; <http://www.ppic.org/>; <http://ca2025.org/>; See also *Higher Education Compact: Agreement Between Governor Schwarzenegger, the University of California, and the California State University, 2005-06 through 2010-11* <http://www.ucop.edu/budget/2005-11compactagreement.pdf>.

provide/disclose varying degrees of specificity and transparency in their budget reports making statistical analysis difficult. The BLRPC could work with the Provost in developing a standard – and scalable – budget template.

- Participate in a variety of Strategic Planning Working Groups.
- Establish a collaborative partnership with the Instructional Department Heads Council (IDHC).
- Work with the Provost on revising the budget process and allocation strategies.

Recommendations

The Chair recommends that the BLRPC should focus on current and emerging Cal Poly issues and be charged with specific projects that have budget implications. For example, the growing interest at Cal Poly in the teacher-scholar model. The BLRPC can provide a reverse point-of-control perspective⁴. Several instructors are concerned about the growing trend of contract buy-outs and the impact on budgets, lack of research infrastructure and quality of teaching.

Other areas to investigate might include: Appoint the new Vice Provost for Strategic Initiatives and Planning to the BLRPC; contribute to Access to Excellence, Strategic Planning and the Master Plan revision; and re-examine the crucial role of Academic Senate Chair and make recommendations to the Senate and Provost.

Finally, the BLRPC chair suggests that the committee collaborates with appropriate partners to create a policy that expands and deepens the role of the Academic Senate Chair. More specifically, recommend that the Senate Chair becomes more directly involved in budget discussions and allocation planning among the Deans Council and other administrative/executive bodies.

The BLRPC should explore ways to secure substantive participation and opportunity to voice faculty input and perspectives throughout the budget planning process.

Release Time

After careful reflection the Chair recommends that the Release Time (4 WTUs) awarded to the BLRPC Chair is re-assigned or withdrawn completely. Though an important committee, hard economic times demand quantitative assessment based on benchmarks of other high-profile AS Committees (e.g., Curriculum, Instruction and DTA). The incoming Senate Chair should re-assess release time awards and report to the Senate next academic year.

⁴ Generally, the point of control is President > Provost > Dean > Department Heads. Since BLRP members represent all of the Colleges and PCS, it serves as an excellent vehicle to express and explore a variety of budget-related issues as they related to Cal Poly Planning from a bottom-top perspective.

Working Groups and the BLRPC

Strategic planning task forces will be created under the supervision of the Provost. These will include: Graduate Programs; Interface Disciplines; Project-Based Learning; Global Perspectives; and ITS. The Provost has asked that BLRPC members serve on these groups to contribute to and document budgetary information and implications throughout the planning process.

The Future of the BLRPC

Cal Poly faculty need to participate in budget planning. The Chair recognizes that though Larry Kelly and the Provost have raised the level of transparency through online dissemination of information and data, there is still something missing in the reporting.

For example, the 2008-2009 budget presentation – though well-prepared – focused on macro level funding issues: higher education in California; Compact issues; enrollment growth; budget shortfalls; and Cal Poly division allocation (time series). The Chair believes – and has documented – that Cal Poly faculty want to know – and understand – the reasoning behind administrative budget decisions. A basic/core driver, for example, is consensus on what is important to the University. Where are these discussions taking place? The Chair believes that the incoming Senate Chair should push for deeper and more effective collaboration and information sharing in regard to specific budget allocations and institutional planning.

Collaboration and Outreach

Potential collaborative projects with the Provost could include:

- Develop a standard – and scalable – budget template for the Colleges.
- Participate in a variety of Strategic Planning Working Groups.
- Establish a collaborative partnership with the Instructional Department Heads Council (IDHC).
- Work with the Provost on revising the budget process/allocation strategies and share the results with the Academic Senate during the 2008-2009 AY.