

Requirements for an Effective Budget/Planning Process

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1. Representative membership and **well-organized structure**, including appropriate subcommittees or work groups with clearly defined charges, to undertake focused tasks and activities within specific timelines
2. **Rational framework for decision making** (to be informed by best practices in the field, e.g., in strategic planning, budgeting, decision analysis)
3. **Guidelines (or "Principles")**, to provide a context for analysis and decisions on funding and priorities, whether planning for growth or constrained resources. (Note: Faculty shall not be expected to nor shall they participate in analyses, discussions or decisions related to retrenchments)
4. Committee and its work groups must be provided with **timely, accurate and complete information** in the degree of detail needed and requested, or must have the ability to obtain such information from appropriate agencies and organizations
5. Committee must be **empowered** to act upon information and analyses, through formal agreement on the nature of and degree of specificity in its recommendations and reports
6. **Formal procedures** by which BPC will give direction and assignments to work groups, accept the reports of work groups, make committee recommendations (e.g., by consensus or majority vote), and regularly report to appropriate campus constituencies
7. Clearly defined charge to [revised] **Budget Work Group**, with focused and specific activities and timelines, and a clearly defined interface with the Committee
8. **Effective and formal coordination** between BPC faculty, the Curriculum and Academic Planning Committee, and the Vice President for Academic Affairs
9. Effective communication between the **Capital Plan Work Group**, facilities staff and other appropriate campus constituencies, with broadening of the work group charge to include quality of life, facilities resources, and campus development issues
10. Committee or appropriate work group shall undertake review and analysis of operational efficiencies, administrative overhead, proportionate resource allocation across divisions and functional areas, and benchmarking, in the **pursuit of budgeting that facilitates achievement of institutional goals**
11. **Regular assessment** of effectiveness of BPC process, with regular reports in this area
12. **Effective and ongoing communication** between the President, the Committee Chair and Vice-Chair

submitted by Maureen Dolan, BPC Chair