

Budget Principles, Criteria and Data Elements

The budget principles, criteria and data elements presented on the following pages are part of Lane's *current* 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 are used to 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; Fall to Fall retention (How does offering trailer sequences help with student retention?)
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; Burning Glass data (understand the parameters and criteria for how this data is attained) Departmental knowledge of former student employment outcomes
Wages (for CT programs)	Employment Department data Burning Glass data (understand the parameters and criteria for how this data is attained) Departmental knowledge of former student employment outcomes
Job Placement (for CT programs)	Employment Department data (understand the parameters and criteria for how this data is attained) Departmental knowledge of former student employment outcomes
Overall Program Success Student Drop	Student loan default rates (Really?)

¹From Lane's current long-range financial plan

out/Stop Out Rate	
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STUDENT SERVICES

Criteria	Data Element
Enhances Student Engagement	Number of service contacts contracts Number of unduplicated participants Demographics of individuals served Restaurant style comment cards / Survey sent to students after specific interactions Other evidence of enhancing engagement
Enhances Student Learning	Enhanced Increased student persistence Enhances Increase one or more CCSSE benchmarks Look at student assessment data Other evidence of enhancing learning

Data Elements (continued)

STUDENT SERVICES (continued)

Criteria	Data Element
Enhances Student Satisfaction	ACT Satisfaction data CCSSE satisfaction data SENSE satisfaction data Other evidence of enhancing satisfaction_ Student Follow-Up Study
Requirement for Service	Essential to completing a business process with students Essential to an effective educational experience Provides quality educational opportunity not available elsewhere at the college Legally mandated Mandated by regulation or law
Uses resources efficiently	Comparison of faculty/staff to student ratios to national association standards and best practices. Develop and utilize appropriate institutional benchmarks Demand/capacity analysis (i.e. , waitlists, complaints about access, declining APS rates, declining SAP rates , etc.) Total general fund budget in relation to number of students served 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	Potential Consequences consequences of not having service_ (cost/benefit analysis) Citation(s) for legal requirements (e.g. governing ORS, federal code, IRS and audit requirements) Impact of service on college goals and student success
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 Processes and procedures are cost efficient 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
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Budget Principles & Criteria²

Budget planning at Lane will be guided by the following:

General principles:

1. Budgets will focus on furthering the college's mission.
2. Budgets must meet legal, contractual, and accreditation obligations.
3. Budgets must meet board policies and involve as much input from the college community as possible.
4. Benchmark ~~to~~ against ~~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~~ annual department 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

Proactive investment in emerging programs and services to meet community needs

²From 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
6. Maintain ability to respond to community needs
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.
- Requirements 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.

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