

Welcome to Budget Managers
Planning and Budgeting for Institutional Effectiveness (PBIE) Committee
Fall 2017

The planning and budgeting process at SUNY Orange had a fresh start last year, and this year we hope to continue progress in using the PIP system to do comprehensive planning at the College. PBIE's role in the process is to be the College community's voice in how resource allocations are made, and to make sure the allocation process is as transparent as possible. We've prepared this welcome to planning for AY 2018-2019 to answer some of the questions we commonly get about the PIP system and the planning and budgeting process. Our voting members are listed at the end of this document, and we are happy to answer any additional questions you might have. We also welcome any comments about the process: we are all new at this, and your feedback is essential in improving how the College does planning and budgeting.

Why do we use the PIP system? The PIP system was designed to make planning and budgeting at SUNY Orange comprehensive, efficient and transparent. It documents the needs of the College, provides a way to choose among those needs in allocating resources, and makes information on the process available to everyone in the College community. Last year, for example, the initiatives budget managers entered into the PIP system showed that the college had a clear need for instructional equipment. Using the evidence provided by the PIP system, the College asked the Foundation for resources to address that need. The Foundation responded generously, and many of the instructional equipment items requested through the PIP system were funded.

The PIP system has three modules: planning, prioritization and assessment. Last year the Administration focused on introducing you to using the planning module. This year the Administration aims to improve use of that module, and to start use of the prioritization module. Once the community is comfortable with these modules we can start using the assessment module.

What are the differences between PIP's planning and the prioritization modules? The planning module provides a workspace for all aspects of planning. You can write goals and work on specific ways to reach those goals. The system refers to those specific projects as "initiatives". You can use the planning module for anything from jotting down ideas to developing a detailed initiative that will put those ideas into action. Its contents can be constantly updated and improved as you work on the planning process with your team, and the PIP system is an effective way to share that process with all those involved. You can also browse the plans of other budget managers, looking for ideas and synergies.

Some of your initiatives may be particularly relevant for the next academic year, and require resources you don't have. If you are interested in the Administration looking for the resources you need, you use the prioritization module. For an initiative to be considered for prioritization (see below), it needs to be complete: it needs to include action steps, responsible parties, etc. If you have more than one initiative to put forward, you also need to prioritize your initiatives in terms of their importance to your goals. Once you have all the required fields completed, your initiative can be viewed in the prioritization module.

What happens to your initiatives after they enter the prioritization module? After December 1 the budget managers in the administrative level above you will begin looking at all the completed initiatives in their area. They can then create their own plans, which may include your initiative as is, they might revise your initiative or combine it with other initiatives, and they can enter in their own initiatives. They prioritize the initiatives they want to go forward to the next administrative level, the Vice Presidents. The Vice Presidents then repeat the process, considering all the initiatives put forward in their area, adding and revising as necessary, and prioritizing those initiatives they think should continue in the prioritization process. PBIE will start looking at all the VP initiatives in mid-January, prioritizing them and writing a report to Cabinet explaining our recommendations. Cabinet does the final prioritization, making its decisions on which initiatives should be first in line for any resources that become available in the coming year. The PIP system gives everyone at the College information on this entire process: anyone can read the completed initiatives and track their progress from beginning to end.

What criteria does PBIE use to prioritize initiatives? This year the College is especially interested in initiatives that aim to improve enrollment and retention, and PBIE will take that interest into consideration. In general, PBIE will consider initiatives more favorably if they meet the following criteria, where appropriate to the particular initiative:

1. Have a clear potential to contribute to progress on specific college priorities.
2. Have a clear potential to contribute to multiple college priorities.
3. Support institutional efficiency by not duplicating a current effort.
4. Complement or can be combined with other initiatives.
5. Are realistic and timely.
6. Are based on supporting assessment data, e.g., program reviews, enrollment data, outside audits, or surveys.

What is the role of the planning and budgeting forums? PBIE will hold planning and budgeting forums again this February. The primary purpose of the forums is to gather feedback from the college community on the Vice President's initiatives, as well as collect any comments and concerns the community has about the planning and budgeting process. PBIE then considers and incorporates that feedback into our report to Cabinet.

VOTING MEMBERS OF THE PBIE COMMITTEE

Representing Staff

Professional Staff (Administration & Finance): Renee Arnold, Procurement Coordinator

Professional Staff (Information Technology): Angela Elia, IT Support Specialist

Professional Staff (Student Services): Maynard Schmidt (PBIE Vice Chair), Director of Admissions and Recruitment.

Support Staff: Nadina Loesel, Senior Clerk, Library

Representing the Academic Affairs Divisions

Business, Mathematics, Science and Technology: Mercy Ebbert (PBIE Chair, Biology), and Michelle Tubbs (Mathematics).

Health Professions: Erica Deslandes (Nursing) and one vacant position.

Liberal Arts: Kidaya Ntoko (Global Studies) and Deborah Chedister (English).

Non-Credit Representative: Dorene Kieva, Operations Coordinator, CAPE

Student Representative: Not yet named.