

President's Fall Retreat
Gustavus Adolphus College
Tuesday, August 8, 2017

Co-Facilitators: Rick Straka & Carrie Chapman

Table Topic Title & Table #1: Forward Looking Budget Planning

Number (& Name) of Participants: 24 total participants

Key Discussion Points:

At each session, we shared the general information about how the Strategic Budgeting Process impetus came to be, and what our general process was over the 2016-17 academic year. The resulting overall Process and specific criteria for Academic and Non-academic Programs document was shared along with the 2017-18 Timeline for initiating the Strategic Budget Process. An emphasis on this need for “forward thinking” was provided in the discussion.

Questions surfaced during table discussions around the following themes:

1. Logistical questions remaining or clarifications needed on the continuing Strategic Budget Process:

- a. How many years in between implementations of the process? – 4 unless a program’s circumstances or the university-at-large circumstances greatly change, which would initiate an interim implementation sooner than 4 years.
- b. Who makes final decisions on what/where investments are made? – Final decisions will continue to be an administrative charge, but all entities and groups can use this process to provide more data and deeper “pictures” of their program or entity – a more explicit advising on the budget process. Meet & Confers and our governance procedures will still be used along the way as a large part of the total process.
- c. Will templates with word limits, etc. be employed? – Yes, and we will take that request to be groups as rubrics and document templates are finalized.

2. Philosophical questions surrounding the Strategic Budgeting Process:

- a. Is this just a budgeting process? – no, but really an integrated Strategic Planning Process with a broader perspective so that all entities see and utilize the data from our myriad prior types of plans at the university.
- b. Was MSU’s academic groupings decision of 3 ‘types’ of program unique to those universities that we used as guides? – Yes, somewhat. More universities have chosen to only have 1 ‘type’ of academic program delineated, but the Academic sub-group almost immediately pushed back against the ‘one size fits all’ notion and developed the resulting 3 types/categories of academic programs to include in the process.

c. This calls for a university/campus “culture change” regarding the budget process. What else will we be doing to help with that culture shift? – All employee groups and administrators will be given information along the timeline this academic year, and all Meet & Confers will include agenda items and some decision making on the timeline and process as we progress through our ‘learning curve’ with this process. Discussions on worth, importance and the need for an understanding of our interdependence will all play a part of this year’s work.

3. Questions yet to be answered on the Strategic Budgeting Process:

a. Who will take ownership of current “non-existent” programs that might be proposed for investment in this process? – ideas of faculty, programs, Dept. Chairs, administration were all shared as possible “entry” points for this creative process. This may be an area that the 3 sub-meets and then Meet & Confer need to discuss and make decisions on. A related question was: Who will advocate for future student activities – Rec./Sports/Activities? – we do not see that necessarily fitting into this Strategic Budgeting Process, but something that should at least initially filter through the Student Government process in existence.

b. When will programs receive the rubrics for each of the narrative areas needed (either Academic or Non-Academic)? – Some of those rubrics have been developed at least at a beginning stage, and the question may remain as to what further development is needed and/or what process do we follow to finalize and approve the rubrics for dissemination out to all programs.

c. Will the issue of programs providing information in an Objective vs. Advocate ‘voice’ have an impact on the evaluation of said programs? – to be determined, perhaps by the rubrics and the Evaluation Teams.

d. How will resources be reallocated? – Attrition or Actively Reduce? – no set determination on that. Campus discussions and administrative decisions will depend on actual circumstances and the ‘landscape’ at the time.

e. Will inclusion in the “Invest” or “Reallocate” bucket ensure immediate budgeting? – no, not typically. The budget process will still be a large discussion and administrative decision-making process that engages all entities.