Workshop Title: Academic Program Review Workshop: Year 3 Update

Description:
Want some tips on how to make your program review as effective and efficient as possible? Want to avoid pitfalls that many people have fallen into? This session is for you. Academic departments will be updating Year 3 of the three-year program review cycle this year. This interactive workshop will give departments practical help to complete their program reviews, including SLOs, budget, and interpreting the data tables. Please join us in this workshop where we will go over tips, including format, content, process for completing the online academic program review, and common problems that were experienced last year.

Learning Outcomes:
By the end of this session, participants will know
1. How to complete the Year 3 update tab, including updating the student learning outcomes tables, submitting the budget for 2014/15, complete the CTE addendum (if applicable), and interpreting the data table.
2. Be able to identify changes made to the format from Year 2’s template.
Budget Planning

Accessing Budget Planning Section

Select the Budget Planning Tab, then select the “Click Here for Budget Planning” button located at the top of the Program Review screen.

Depending on what types of budgets your program has, you may or may not have multiple department budget forms (as shown below). If you have multiple budgets, please be sure to click on and review each budget you are responsible for.
Completing Budget Request forms

Click on the “Budget Request Entry” form you wish to work on. You will access a screen which looks like the sample below.

**Information on this screen (From left to right):**

- **Object Code:** The five-digit code we use to describe an expense. Please note there are three placeholder object codes which are automatically included in each budget request entry form.
  - “00000” - Cut Budget
  - “00001” - Give Money to Another Department
  - “99999” - Receive Money from Another Department
- **Location Code:** The description of the 5 digit object code.
- **Location Code:** The four-digit code we use to describe the administrative oversight of a line item. (e.g. 2000 = Instruction, 9200 = CCC Instruction, 3000 = Student Services).
- **Actuals:** Three years of actual expenditures for that line item.
- **Allocated Budget:** This is your current year adopted budget adjusted for errors and other on-going changes. This does not include routine budget transfers made during the year.
- **Ongoing Budget:** Your base budget for the upcoming fiscal year. The Ongoing column for the upcoming year is automatically populated with the same budget as your Allocated Budget for the current year. This column is where you will make budget cuts, transfers to and from Departments, and reallocations (if necessary).
- **Augmentation Requests:** Requests for additional funds for Non-Equipment items for the upcoming fiscal year.
- **One-time or Ongoing:** Use the drop-down box to choose the appropriate option, only required if augmentation is requested.
  - One-time – funds needed for a specific purpose for only one year.
  - Ongoing – funds needed for the upcoming and future years due to growth in your program or other factors.
- **Department Objectives:** Use the drop-down box to choose a department objective this budget request is most closely related to, only required for augmentation request.
- **Comment:** This is a not a required filed, but you are encouraged to make brief notes that will help your higher level Budget Manager and Business Services understand your request, especially when you would like your request to be classified as a forced cost. Suggestion: Use capital letters to indicate a forced cost at the very beginning of your comment so it will be easily noticed.
- **Remove:** Click here to remove a newly added budget line item from your budget screen.
Buttons on this screen:

- Add New Budget Item: Use this button to add an object code not already listed on the screen for either reallocation of your existing funding or Augmentation Requests.
- Add/Edit New Equipment Item: Use this button to pull up or make changes to the Equipment Request screen.
- Calc Total: Click this button at any time to calculate budget information you have entered. You will receive an error message if your “Ongoing” budget column does not balance with the “Allocated” column.
- Save/Exit: Click this button when you are finished entering budget information, including augmentations and equipment requests for this budget.
- Cancel: Click to cancel and leave the screen without saving the information entered on the budget request entry form.

Actions to take:

1. Request Status Quo Budget – Review the information on the budget request entry form. If nothing needs to be changed, click save and exit.

2. Cut Budget – Enter the number you wish to cut as a positive number in the “00000” object code line under the “Ongoing” column; reduce the budget lines where the cuts are to be taken from by the same amount. Make a note in the “Comment” column to document the reason for the cut.

3. Reallocation Budget – You’re encouraged to reallocate your budget based on your recent spending trends of spending and projections for the upcoming fiscal year. You can either reallocate among your existing budget lines, to newly added budget lines, or move funds to another program as long as the total amount equals your current year Allocated Budget. Note that you are not allowed to transfer between fund 11 discretionary budgets and fund 12 lottery budgets.

To be able to reallocate budget to a new budget line, click Add the New Budget Item button on the budget request entry form. Use the drop-down menu to choose the object code you’d like to add.
Click the “Save/Exit” button. The new object code is inserted into budget request entry screen. Please note the word “Remove” only appears for the newly added line. To cancel the line, click “Remove”.

To move funds to the newly added budget line, reduce the budget line(s) where you are taking money from and input the same amount in the new budget line. After clicking Calc Total button, the Ongoing Budget column must always equal the Allocated Budget column to the left.
The system will prevent you from submitting an unbalanced budget. You will receive an error message if the Ongoing Request does not equal the Allocated Budget. Follow the pop-up message to make corrections.

For reallocations between departments, enter the amount given to another department as a positive number under the object code “00001”, and reduce the lines where the money is taken from by the same amount. Enter the amount to be received from another department under object code “99999” as a negative number and increase the lines where the money is being applied to by the same amount. Indicate in the Comment area which Department the money is being transferred to or from. Again, when all changes have been made, this Ongoing column must equal the Allocated Budget column.
4. Request Budget Augmentation – you can request funds for a new budget line (Follow the procedures on adding new budget item) or request additional funds for existing budget lines. Enter the amount of additional funds needed in each line item. Use the drop-down box to choose One Time or On-Going option and then select an objective that best matches the budget augmentation request. Make use of the Comment area to support your request.

Note: If you make an entry in the Ongoing 2013/14 allocation column to transfer money out of a particular budget line, you may not make a budget augmentation request to that same budget line.
5. Request Equipment Item - Click on the Add/Edit New Equipment Item button and you will see a message which reads “No NRER Items available at this time!” This message means that a New or Replacement Equipment Request (NRER) has not yet been made for this fiscal year for this Department.

Click the link “Add New Request” and complete the following screen.

- Item Requested – Be as specific as you can. Include brand name and model if available.
- Quantity – How many of this item are you requesting?
- Object Code – Use this drop-down box to select the appropriate object code for this item.
  - Helpful hint: Items with an individual cost of $5,000 or more will have the “GASB” tag; Include tax, shipping/handling when determining cost of item.
- Location – Where will this item live? Example: “SCOH 328-A”
Potential Fund Resource(s) — If you have a grant, categorical program, or other funding source that may be used to purchase this item, please select the appropriate choice from the drop-down menu. If not, leave field as is.

Total Amount — Enter the total cost plus tax, shipping/handling.

Program Objectives — Use the drop-down box to choose an objective this budget request best pertains to.

Click “Save/Exit”. Your request will show up on the main New/Replacement Equipment Request screen.

Repeat the process for more equipment requests if necessary. Click the “Return” button to go back to the budget request entry form. You will notice your equipment request is not currently showing in the budget request entry form screen. Exit the screen using the Save/Exit or Cancel button and go back to the main budget request screen. The new form named “New/Replacement Request Ranking” will now be included.

If you have multiple “Department Budget Forms” to complete, click on the next budget you wish to work on and repeat entire process until you have completed all forms within this program.
Ranking Budget Requests

If you have requested budget augmentations or new/replacement equipment, you will need to complete the “Department Budget Rankings” section to rank your requests. This section is directly below the Department Budget Forms section. By default, you will have a Budget Augmentation Request Ranking (Fund 11) form, but you do not need to take action if you do not have any augmentation requests. The New/Replacement Equipment Request Ranking form only appears when you have made a new/replacement equipment request. No matter how many budget request forms you have, you will only have one Augmentation Request Ranking and one Equipment Request Ranking.

Click the link for “Budget Augmentation Request Ranking.”
- These are the line items you requested additional funds for. The default “Department Priority” is set to “-1”.
- You must prioritize each item on the list.
- Number your items in the order of importance to your program (1 = most important).
- Numbering must be sequential (1, 2, 3 etc. – do not skip numbers)
- Click the “Save/Exit” button when finished.
Follow the same process to complete the New/Replacement Equipment Ranking.

This completes the Budget Request Form section of the Program Review. Click the “Return to Academic Program Planning and Review” Button to exit the budget planning module.