Overview of Process

- Spring 2016 Resource Specialist Roy Stutzman hired to facilitate dialogue-develop new allocation model

- Mr. Stutzman conducted interviews with District and college leadership and organization constituent groups: conducted 21 individual meetings

- RAM Taskforce formed in October, 2016
Overview of Process

RAM Taskforce met Fall and Spring FY 2016-2017: 16 meetings

RAM Taskforce focused on 4 items:
1) Develop a revenue based model
2) Identify key issues
3) Update 2008 and 2011 Budget Principles
4) Develop Business Procedures
Overview of Process

Consultant Criteria

1) Is it Fair?
2) Is it easily understood?
3) Does it work in good times and bad?
4) Does it provide proper performance incentives?
5) Does it assure fiscal stability?
Current Status

Awaiting consultant recommendations:

1) Recommended Simulation

2) Business Procedures

3) 2017 Business Principles
San Jose Evergreen Community College District
Student Success

Innovation and Performance Incentives Program $1M
Possible Criteria Considerations

1) Transferability
2) College Readiness
3) College Experience
4) Degree and Certificate Completion

Source: Ends Policies and Strategic Priorities (April 25, 2017)
Consultant Recommendation
Simulation Characteristics

- **Revenue Based**: Allocate initial property tax dollars
- **Follow SB 361 methodology** - Block Grant and FTES Driven
- **Block Grant $30M**
  1. Basic Allocation $20M
  2. College Program/Performance $9M
  3. Performance and Innovation $1M
Consultant Recommendation
Simulation Characteristics

- FTES Based on 3 year rolling average
- Allocate all other “District” Revenues
- Reduce for cost of District-Wide expenses
- Reduce for cost of District Services
- Colleges keep 100% of college generated revenue

Result: All dollars allocated - Colleges and District responsible for managing within allocations
Consultant Recommendation
Simulation Characteristics

➢ Subsequent property tax changes = Discussion as to how to allocate

  • Collective Bargaining
  • Innovation
  • Additional unforeseen, unplanned, planned but unfunded, etc.
Next Steps

- Receive Consultant Reports
- Begin vetting process
- Goal to implement simulation ASAP – address variances, if any
- Utilize RAM Taskforce, DBC, Academic Senates, DC, BOT
- Address unfinished business: CTE, District Services, Innovation Criteria, etc.
Next Steps

- Finish unfinished business
- Review and refine through DBC