SAN JOSE-EVERGREEN COMMUNITY COLLEGE DISTRICT

MULTI COLLEGE RESOURCE ALLOCATION

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**WHY REVIEW CURRENT MODEL?**

- Allocation model “check up”
- Impact of move from state funding to “basic Aid” in 2012/13
- Assure linkage between revenues and expenditures
- Fiscal stability and accountability
- Documentation and understanding (transparency)
- “Development of a new District allocation model” was approved by the Board of Trustees as a budget Principle in 2016/17 budget planning
- Self Study discussion around accreditation standards IIID1 and IVD3
ALLOCATION PRINCIPLES

• Must be simple and easy to understand
• Must provide for financial stability
• Must provide for an appropriate level of reserves consistent with board policy and direction
• Must be responsive to the District/College’s planning process and related goals and objectives
• Must provide means to address any current or future emphasis directed by the Governing Board
• Must promote efficient use of District resources
须灵活并允许在本地级别做出适当决定
- 必须允许学院发起、实施并对其项目和服务倡议负责
- 必须为地区服务和全地区性支出提供透明度，以支持学院运营。
- 必须根据客观标准或衡量标准匹配资源和服务水平，以确保公平。
Is the model easily understood?
Is the model “fair”
Regardless of allocation method used, the amount of revenue to be distributed is finite

Use sound and rational formula to distribute revenue to colleges

Need for consistent District and College Enrollment Management Plans (yes, even in basic aid district)

District Wide costs and cost of providing District Services shall be clearly identified and provided for in the model
Allocation Model should: a) encourage colleges to maximize revenues and provide incentives to make effective use of those resources and b) provide incentives to improve student access and provide for quality improvement.

Required District reserve will be provided for in the model.
TYPICAL ALLOCATION MODEL ISSUES

- Work load measures
- Timing of allocations to colleges
- Ending balances
- Reserves and deficits – accountability
  - reserves
  - Accountability for over spending
- Allocation of new revenues
- Long term planning
- Collectively bargained compensation increases
- Shifting of resources between colleges
- Periodic review of the procedures
  - 1 year after implementation
  - 2-3 year review
- 50% Law
- Full Time faculty obligation (FON)
“Financial resources are sufficient to support student learning programs and services and improve institutional effectiveness. The distribution of resources supports the development, maintenance, allocation and reallocation, and enhancement of programs and services. The institution plans and manages its financial affairs with integrity and in a manner that ensures financial stability.”
ACCREDITATION COMMISSION STANDARD IVD3

The district/system provides fair distribution of resources that are adequate to support the effective operations of the colleges.