

Santa Ana College Planning & Budget Committee

2026–27 Goals and CEP Alignment

Draft for Committee Discussion

Goal 1. Strengthen Participation and Understanding of the College’s Budget Process

Objective	Improve stakeholder understanding of Planning & Budget Committee’s responsibilities and opportunities for participation.
Key Activities	• Provide committee members with orientation or reference information regarding the budget process and committee responsibilities. • Encourage participation from faculty, classified professionals, students, and administrators. • Clearly communicate significant budget matters being considered back to constituents and through recommendations made to College Council
Measurable Outcomes	• New and continuing members receive budget/process orientation or reference materials. • Annual review of committee charter (purpose, charge and membership) presented to IE&A • Significant budget recommendations are communicated through established governance channels.
CEP Alignment	CEP 3.4 - Strengthen participatory governance through training, broad representation, transparency, and understanding of committee roles and responsibilities.

Goal 2. Strengthen equity and accountability in how resources are allocated

Objective	Establish RAR data infrastructure that ties resource requests to CEP goals and fund sources
Key Activities	• Updates to Nuventive: ○ Add a CEP-goal/objective dropdown to the RAR intake form ○ Relabel/repurpose "Is this an annual on-going expense?" to also indicate anticipated Fund 11 (ongoing) vs. Fund 13 (one-time) designation ○ Convert the conditional "other funding sources" question into an unconditional restricted/categorical (Fund 12) flag ○ Confirm official fund list and categorical program names with Budget & Accounting before finalizing dropdown ○ Pilot the updated form for the FY27-28 RAR cycle • Review and clarify the criteria used in Resource Allocation Requests, program review, and hiring/resource prioritization so that proposals consistently document student impact, equity considerations, ongoing costs, sustainability, and alignment with institutional goals. • Before the next resource-request cycle, adopt a common evaluation rubric that includes student-success impact, equity impact, alignment with program review and strategic goals, etc.
Measurable Outcomes	• CEP-goal tag completed on 100% of FY27-28 RAR • Fund source (11/12/13) visible and filterable at intake, eliminating the need to decode GL account prefixes to determine which fund a request draws from • Updates to Nuventive completed
CEP Alignment	Obj. 4.2 — Makes resource allocation reportable by fund source, supporting "maximize funding and allocate resources" as a documented practice rather than an undemonstrated claim

Goal 3. Improve Budget Transparency and Communication

Objective	Increase campus understanding of the college budget and major financial decisions using existing reports, communication methods, and the development of a fiscal dashboard.
Key Activities	• Provide regular budget updates during committee meetings. • Share clear summaries of revenues, expenditures, reserves, restricted and unrestricted resources, and significant budget changes. • Provide presentations or updates to governance groups when appropriate. • Develop a first-phase, accessible financial dashboard that presents a small set of high-priority budget information and provides basic training for committee members and campus users.
Measurable Outcomes	• Budget updates are provided regularly during the academic year. • At least two budget presentations or updates are provided to college governance groups during 2026–27. • Publish a pilot financial dashboard with 2–3 core budget measures • Offer two short budget trainings for governance and department representatives.
CEP Alignment	CEP 3.1 and 3.2 - Improve access to institutional and financial information and support informed decision-making. The CEP identifies increased access to financial reporting and institutional information as priorities.

Goal 4. Promote Fiscal Sustainability and Effective Use of Resources

Objective	Encourage funding decisions that balance student impact, institutional priorities, cost, and long-term sustainability.
Key Activities	• Discuss initial and ongoing costs of major funding requests. • Consider whether proposed expenditures support student success, operational efficiency, equity, or institutional priorities. • Identify potential long-term financial commitments before recommendations are made.
Measurable Outcomes	• Major funding recommendations include consideration of fiscal sustainability and anticipated institutional or student impact. • Committee records demonstrate discussion of ongoing costs for significant new commitments.
CEP Alignment	CEP 4.1 - Evaluate and balance the cost and sustainability of initiatives relative to outcomes, and prioritize investments that support long-term student success and operational efficiency.

Goal 5. Strengthen Data-Informed Resource Allocation

Objective	Use available institutional and financial information to support resource-allocation discussions and recommendations.
Key Activities	• Review relevant enrollment, student achievement, program, financial, and other institutional data when evaluating significant resource needs. • Work with appropriate offices and committees to obtain information needed for informed discussions.
Measurable Outcomes	• Significant recommendations demonstrate consideration of available data. • At least two committee discussions during the year specifically examine institutional or financial data in relation to resource allocation.
CEP Alignment	CEP 3.2 - Utilize accurate and reliable disaggregated information to make informed decisions. The CEP calls for district-provided data to inform resource allocation and strategic planning.