



Chancellor's Chat

A SAN BERNARDINO COMMUNITY COLLEGE DISTRICT PUBLICATION
ENHANCING YOUR LIFE WITH QUALITY EDUCATION

VOLUME 5 • ISSUE 16

November 6, 2015

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One-Time Off Salary Schedule Bonus Goes to Board for Approval

At the November 12 Board meeting, the board will be asked to approve a one-time off salary schedule bonus to all full-time employees and adjunct faculty in recognition of the value and service provided by the employees. The following information will be helpful to you in understanding the tax implications of the one-time bonus.



Q: Should I change on my withholdings/W-4 form to get the maximum amount?

A: Since every individual's tax situation is unique, it is best to consult with a tax advisor regarding the impact of changing tax withholdings.

Q: Will I be able to change my withholdings/W-4 form for the December 15 longevity/one-time off salary schedule bonus?

A: YES! For the December 15th pay date, a withholdings/W-4 form must be submitted to Payroll no later than November 16th.

Q: What if I want to change my withholdings/W-4 for only the December 15 pay date and return back to my normal withholdings for my December 30th pay date:

A: For the December 30th pay date, a withholdings/W-4 form must be submitted to Payroll no later than December 10th.

Q: What are the consequences of not changing your withholdings/W-4 back to my normal withholdings after receiving my longevity/bonus?

A: Estimates of the impact of withholding adjustments should be made by consulting your tax advisor.

Q: Will there be available locations on all District sites to submit my W-4 form before and after to avoid having to travel to the District?

A: For your convenience, the 2015 W-4 form is attached. Because it contains sensitive information, completed forms should be signed and submitted personally to the Payroll Department.

Q: Will CalPERS come out of the bonus and longevity checks?

A: Deductions from CalPERS will come out of the bonus and longevity pay unless the employee was hired after January 1, 2013. For those employees, additional compensation (such as bonus and longevity) does not count towards retirement, so no CalPERS is deducted.

Hay Group Update

On October 12, 2015, The Hay Group presented its report on the classification and compensation study. The focus of the presentation was the District's position in relation to the median salary ranges across the classifications of management, classified, and faculty based on a market study that included seven (7) benchmark districts. The districts used were Chaffey, Palomar, Victor Valley, Riverside, Mt. San Antonio, Mt. San Jacinto, and College of the Desert.

Overall, the District has remained relatively competitive based on actual salaries paid, however several positions have fallen below the median. To bring all positions to the median in accordance to the Hay data would cost about \$1 million dollars in ongoing expenses. Hay recommended that positions that were falling significantly below the median should be considered for movement on the salary schedule. An additional 176

staff in certain positions were also recognized as below the median within their classification.

It should be noted that the last data collected by The Hay Group was in November 2014, and some of the benchmark districts have since adjusted their salary schedules. More importantly, the analysis did not include the cost of health and welfare compared to the benchmark districts. Therefore, a total compensation analysis still needs to be addressed and the data

will be provided to each association/employee group. This data will be further reviewed and addressed at



***SBCCD's
15% Reserve***

Fund

Fiscal Services has provided a list of frequently asked questions about SBCCD's 15 percent reserve fund. If you have additional questions, please email kgoodric@sbccd.org and the fiscal services team will do their best to provide you with an answer.

ATTACHMENT (p.8)

the negotiations table with each respective group. If you have any questions about this information please address them to Dr. Lisa Norman, Vice Chancellor for Human Resources at lnorman@sbccd.org.

Chancellor Responds to District Office Assessment Questions

At the October Board meeting, a question was raised about how the District assessment was determined and why the amount increased between the Tentative Budget in May and the Final Budget in September. As you know, the District Office and several District-Wide costs are budgeted centrally and funded prior to revenue being distributed to the campuses. Costs for services such as Technology and Educational Support Services, District Safety and Security, liability insurance, Business and Financial Services, etc. are covered by this allocation.

Between the May 2015 preliminary budget presentation and the adoption of the September 2015 final budget, \$1.9 million was added to the District apportionment. Funding for the Affordable

Care Act, sick leave for part-time employees, improvements necessitated by ACCJC recommendations, compliance costs associated with legal changes in Title IX were among some of the areas that resulted in cost increases. Attached to this Chancellor's Chat is a report prepared by the Vice Chancellor for Business and Fiscal Services providing greater detail about the District Office budget and the role played by the District Budget Committee.

ATTACHMENT (p.10)



District Accreditation Accomplishments

The ACCJC Ad Hoc Task Force reconvened on September 3, 2015 to discuss the previous work on District-level accreditation recommendations and additional progress made over the summer. I appreciate the work of the ACCJC Ad Hoc Task Force, whose members have answered the following questions for each District-level recommendation:

- What triggered the findings?
- What needs to be done to address the findings?
- What evidence will we provide and in what format?
- What are the necessary resources?

A working draft Response to Team Recommendations and the Commission Action Letter for District Recommendations was developed. The document describes the resolution of each recommendation, analyzes the results achieved to date, provides evidence of the results, and indicates additional plans that have been developed. Nothing is more important than preparing the accreditation follow-up report. I believe we are headed in the right direction and when the report is completed, it will show the ACCJC that we have done the hard work and deserve to be taken off of sanction. The ACCJC Ad Hoc Task Force will meet again in December and updates will continue to be shared district-wide.

ATTACHMENT (p.25)

Per Diem Meal Allowances Reduced to \$64

In compliance with District Travel Policy and Administrative Procedure 7400, effective 12/1/2015, the per diem meal allowance for the district will be reduced to \$64.00 for full days of travel, and \$48.00 for the first and last days of travel.

Policy states that meals are reimbursed at the maximum U.S. General Services Administration (www.gsa.gov/perdiem) per diem rate for the Los Angeles-Orange County area. This means that the rates will fluctuate from year to year. This year the rate was reduced from \$71 to \$64.



Reimbursement remains based upon actual and necessary meal costs, including tax and gratuity. A maximum acceptable gratuity is 20% of allowable meal expenses and taxes. Itemized receipts are still required by the County Office of Education who handles the District's payment processing.

Please refer to AP 7400 and AP 2735 for further details.

Board Policies & Procedures Review and Update Schedule

As many of you know, the District has been undergoing an update to all of our board policies and administrative procedures. The purpose of the update is to ensure compliance with Title 5, California Education Code, current laws, and current district/college needs. The numbering system of the policies and procedures found on the District Website aligns with the California Community College League's numbering system for consistency with other community colleges throughout the state. Current Policies and Procedures are linked on the District Website [http://www.sbccd.org/Board_of_Trustees/Policies_-a-, Procedures](http://www.sbccd.org/Board_of_Trustees/Policies_-a-,_Procedures)

Policies & Procedures moving forward for Board approval:

BP 2200 Board Duties & Responsibilities - District Assembly agreed. This will go to Board in December.

BP 2210 Officers - District Assembly agreed with changes and recommended adding who the conference host is. "The Board President will attend a New Board Chair Workshop hosted by the California Community College League in January." This will go to Board in December.

BP 2220 Committees of the Board – District Assembly recommended the board reference standing committees on the District website and not on the Board Policy. This will go to Board in December.

BP 2305 Annual Organizational Meeting - District Assembly agreed. This will go to Board in December.

AP 7250 Educational Administrators - District Assembly agreed with the AP. The BP was presented to District Assembly for 1st reading and is under review.



Policies & Procedures Currently Under Review:

BP/AP 7150 Evaluation - District Assembly asked for the Management Association to review and recommend changes (if any) by District Assembly's December meeting.

BP 7250 Educational Administrators

BP/AP 5530 Student Rights & Grievances

BP/AP 7340 Leaves



Title IX – NCHERM

The broad scope of Title IX, which has entailed numerous changes in the law over the past several years, has necessitated San Bernardino Community College District to assess compliancy standards. New regulations have included penalties that range from \$30,000 to \$100,000 for non-compliance. To assess the various areas that are inclusive under Title IX, the District has contracted with NCHERM, one of the nationwide, top consultants for Title IX compliancy and implementation. The contractual agreement includes a full diagnostic of the District's needs as well as mandated trainings for campus and district coordinators and investigators. The Diagnostic assessment will include legal updates to policies and procedures and as a part of the comprehensive training package, off-site consulting time will be provided including consultation by phone and email, on –demand throughout the year for as many administrators designated by the District.

The SBCCD in the News for 11.05.2015 can be viewed [here](#):

The following stories were included:

- ◆ CHC Alum to Write Medical Column
- ◆ CHC and SBVC participate in CSUSB Education Fair
- ◆ CHC to host Open House
- ◆ Ethnic Studies slowly being implemented at San Bernardino schools
- ◆ HBCU College Fair Scheduled
- ◆ SBVC Aero-nautics Department participates in Toys for Tots Drive
- ◆ SBVC Professor to Speak at Film Presentation
- ◆ SBVC Sports Roundup
- ◆ SBVC Supports Young Women's Empowerment Foundation and Organization's Founder
- ◆ Trustee Honored at IEHLC Gala
- ◆ Valley's Got Talent! Show November 6xcites students

More news on the District can be viewed [here](#)

My Vision

As I continue to reflect on my vision for the San Bernardino Community College District, I feel, stronger than ever, the importance of maintaining my commitment to these ideals. We have been successful in many areas of this vision. In other areas, the progress toward the vision will take time, but I remain faithful in the desire to achieve these ideals.

We Will:

- Be considered the "best" community college in the State.
- Build a culture of trust with open and respectful communication.
- Increase all partnerships with business and industry, other academic institutions, non-profit agencies so that we can be stronger through combining resources and working together.
- Improve student success as measured by the State Chancellor's Office and any additional indicators that we determine are appropriate.
- Increase our resource development and bring new grants and fundraising dollars to the colleges.
- Continue to develop and implement new academic programs that Meet the needs of our community.
- Use technology to work smarter and to improve opportunities for student success.
- Provide service to students that reflects quality and excellence.
- Enhance our safety programs and be responsive to staff concerns about environmental health and safety.
- Hold professional development, including wellness, to be an integral part of our commitment to faculty and staff.

Please let me know how I can help you in the performance of your important work on behalf of our great District.

Sincerely,



Bruce Baron
Chancellor

Contact Us

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(909) 382-4091 - chancellor@sbccd.org - www.sbccd.org



Mission Statement

The mission of the San Bernardino Community College District (SBCCD) is to transform lives through the education of our students for the benefit of our diverse communities.

This mission is achieved through the District's two colleges, San Bernardino Valley College (SBVC) and Crafton Hills College (CHC); the Economic Development and Corporate Training Center (EDCT); and public broadcast system (KVCR TV-FM) by providing to the students and communities we serve; high quality, effective and accountable instructional programs and services.

Board of Trustees

The Board of Trustees of the San Bernardino Community College District is the governing body of the District. The Board is established by, and derives its power and duties from, the Constitution of the State of California and the Statutes of California as adopted by the Legislature and issued in the California Education Code, and the directives of the Board of Governors, California Community Colleges, listed in Title V, California Code of Regulations.

Seven trustees, elected from your communities, and two student representatives elected by their respective campuses govern the San Bernardino Community College District. Trustees serve a four-year term, while the non-voting student trustees serve a one-year term.

All regular and special meetings of the Board, except as otherwise required or permitted by law, are open to the public so that citizens may have the benefit of Board deliberations concerning items under consideration.

John Longville, President
Trustee Area 3

Joseph Williams, Vice President
Trustee Area 2

Gloria Macias Harrison, Clerk
Trustee Area 5

Dr. Donald L. Singer, Trustee
Trustee Area 4

Nickolas W. Zoumbos, Trustee
Trustee Area 5

Esmeralda Vazquez,
CHC Student Trustee

Donna Ferracone, Trustee
Trustee Area 6

Trustee Area 7, VACANT

Thomas Robles
SBVC Student Trustee

15% Reserve Fund

Why is the District Reserve set to 15%? Has anybody ever considered reducing this amount?

During the final quarter of 2014, the District Budget Committee (DBC) discussed the possibility of recommending to Chancellor's Cabinet that the District consider lowering its reserve fund to less than 15%. After much discussion and a report from a DBC subcommittee established to discuss this topic, committee members approved such a recommendation to amend the 2015-16 board directives as they pertain to the 15% fund balance reserve. This recommendation was made in light of the following factors.

- 1) Unfunded FTES is one of the primary factors in the new proposed growth formula developed under SB 860. Over the next three years, SBCCD must average at least 1% unfunded FTES per year in order to maximize the points under this factor.
- 2) The Government Finance Officers Association (GFOA) has recently developed a best practice in community college budgeting. In this new best practice, the GFOA recommends, at a minimum, that colleges maintain unrestricted fund balance in their general fund of no less than 10% of regular general fund operating revenues or regular general fund operating expenditures and operating transfers out (if applicable).
- 3) Implementation of the upcoming Districtwide Enrollment Management Plan may necessitate the District to commit to a certain number of unfunded FTES.
- 4) Pursuit of districtwide strategic plan goals of student success and access may require additional funded initiatives.
- 5) The campuses would like to see fulfillment of unmet needs based on program review.

The District Budget Committee recommended that the Board of Trustees revise its 2015-16 budget directives as indicated below.

Board Directives for the 2015-16 Budget
Approved at the November 13, 2014 Board of Trustees Meeting

1. Balance the 2015-16 budget without the use of Fund Balance (Reserve).
2. Maintain a minimum Fund Balance ~~goal level~~ of 15% (state minimum is 5%).
3. Fund Balance may be utilized for specially identified, strategic "one-time" initiatives such as FTES growth and/or student success, if necessary, even if it causes the fund balance to go below 15%. However, the minimum fund balance should not fall below 10%. "one-time" needs as long as the 15% balance can be maintained.

“One-time” is defined as an expenditure that has no ongoing commitment. While “one-time” needs may be repeated in future years, the nature of the expenditure must conform to the definition.

Chancellor's Cabinet thanked the DBC for its continuing efforts to improve the fiscal processes of the District and approved the recommendation with the addition of one sentence Directive 3. to read, “The Board of Trustees may take action to utilize the fund balance for other purposes as it deems necessary and appropriate for the benefit of the District.”

An item was submitted to the Board of Trustees at its February 12, 2015 meeting requesting approval to revise the Board Directives for the 2015-16 budget, however, the Board of Trustees did not approve the revision of directives for 2015-16. Board members felt that the previously approved 15% should stand and that any pressing projects that challenged the 15% could be addressed on a case by case basis.

Still have questions? Email them to us at kgoodric@sbccd.cc.ca.us and we'll do our best to answer them.

2015-16 District Office Expense Budget – Tentative to Final

Why does it appear that the District Office budget increased by \$1.9 million between the tentative budget in May and the final budget in September?

Questions have been raised about how the District apportionment was determined. Between the May 2015 preliminary budget presentation and the adoption of the September 2015 final budget, \$1.9 million was added to the District apportionment. When the Chancellor addressed the SBVC Academic Senate on September 30, he stated that he had asked the Interim Vice Chancellor of Fiscal Services to provide an explanation for the significant increase.

Although the \$1.9 million increase was addressed in the October 5 Frequently Asked Questions communication, we believe there is additional information that is important to bring to everyone's attention. **The \$1.9 million is not a variance from tentative budget to final budget, but rather a variance from last year's actuals to the final budget.** This is only one comparison which does not reflect the entire picture. We hope this additional information will promote transparency and understanding.

Using only one comparison like the variance from prior year actuals to final budget doesn't necessarily mean that the budget has increased from one year to another. For example, prior year actuals reflect savings from vacant positions during the past year or savings from eliminating/reducing contracts. In addition, last year's actuals do not reflect program review needs for the following year, such as new positions. Take for example the following comparisons.

The \$1.9 million is not a variance from tentative budget to final budget, but rather a variance from last year's actuals to the final budget. This is only one comparison which does not reflect the entire picture.

Prior Year Actuals vs. Current Year Budget

Site	2014-15 Unaudited Actuals	2015-16 Final Budget	Increase / (Decrease)	Percent
SBVC	43,805,911	46,429,994	2,624,083	6.0%
CHC	21,651,866	23,189,659	1,537,793	7.1%
District Office	15,210,475	16,522,790	1,312,315	8.6%
Total Expenditures	80,668,252	86,142,443	5,474,191	6.8%

If we just look at the previous table we could make the assumption that our budget for FY 2015-16 increased by \$5.5 million or 6.8%; however, an analysis comparing last year's budget to the current final budget shows a different picture.

Prior Year Budget vs. Current Year Budget

Site	2014-15 Final Adjusted Budget	2015-16 Final Budget	Increase / (Decrease)	Percent
SBVC	44,954,774	46,429,994	1,475,220	3.3%
CHC	21,296,500	23,189,659	1,893,159	8.9%
District Office	15,672,206	16,522,790	850,584	5.4%
Total Expenditures	81,923,480	86,142,443	4,218,963	5.1%

The table above shows that our budget increased \$4.2 million or 5.1% when we compare the final adjusted budget for FY 2014-15 to the current final budget. Comparing prior and current year budgets better illustrates budget changes from one year to another.

Comparing prior and current year budgets better illustrates budget changes from one year to another.

A better analysis of last year's actuals is to compare those expenditures with last year's final adjusted budget, as follows.

Prior Year Budget vs. Prior Year Actuals

Site	2014-15 Final Adjusted Budget	2014-15 Unaudited Actuals	Savings / (Excess)	Percent
SBVC	44,954,774	43,805,911	1,148,863	2.6%
CHC	21,296,500	21,651,866	(355,366)	-1.7%
District Office	15,672,206	15,210,475	461,731	2.9%
Total Expenditures	81,923,480	80,668,252	1,255,228	1.5%

The table above shows that we saved \$1.3 million or 1.5% last year from our final adjusted budget. Attached is [Appendix A – Details by Site](#). We encourage you to review the data it contains and let us know if you have any questions.

If \$1.9 million is not the amount the District Office budget increased from tentative to final, then what is the amount and why did these changes happen?

It is very common for budgets to change from the tentative to final stage. The State Chancellor's Office doesn't provide final estimates until the end of July or early August. Prior to this date, we utilize the best possible estimates from the Governor's May Revised Budget. We strive to have the final budget done by mid-August since it must, by law, be Board approved by September 15. This year was actually even more challenging due to

the implementation of California's new Growth Formula. Both colleges and the District modified their budgets from tentative to final as follows.

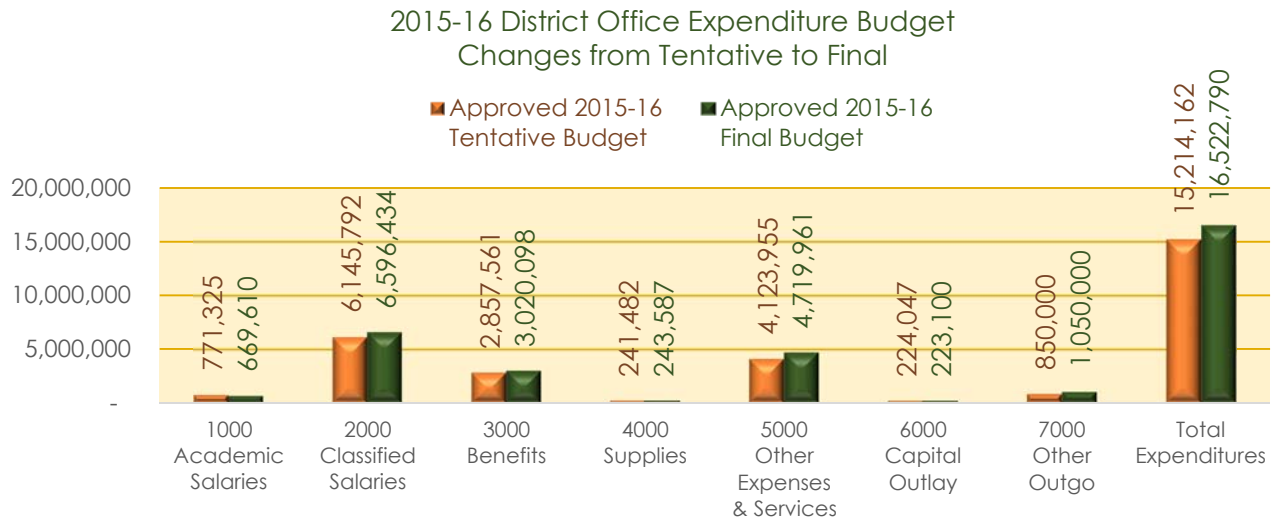
Tentative vs. Current Year Budget

Site	2015-16 Tentative Budget	2015-16 Final Budget	Increase / (Decrease)	Percent
SBVC	45,525,665	46,429,994	904,329	2.0%
CHC	22,891,225	23,189,659	298,434	1.3%
District Office	15,214,162	16,522,790	1,308,628	8.6%
Total Expenditures	83,631,052	86,142,443	2,511,391	3.0%

The District Office budget increased from tentative to final by \$1.3 million and the main reasons for this are as follows:

- **In an effort to address accreditation recommendations**, the Board of Trustees approved a much-needed restructuring plan for the Human Resources Department at its June 11 meeting. This plan was developed by the newly hired (May 2015) Vice Chancellor of Human Resources and occurred after the development of the tentative budget.
- The Vice Chancellor of Human Resources discovered **compliance issues with Title IX, Affordable Care Act and ACCJC recommendations**; therefore new contracts were needed to address those issues.
- Working with the Vice Presidents of Administrative Services, the decision was made to give back the parking program budget to the colleges. Therefore, police and security was shifted to the District Office budget. **The colleges now have full control of their parking program budgets.**
- Finally, we needed to account for items that were, inadvertently, not budgeted at tentative budget.

Please take a look at the following table as well as [Appendix B – Baseline Comparison by Program](#) for additional details.



1000 – Academic Salaries - \$(101,715)

- This amount varies every year depending on faculty reassigned time for District Assembly & Collective Bargaining

2000 – Classified Salaries - \$450,642 – see attached

- \$130K Human Resources & Health/Safety Restructuring Plan as approved on the June 11, 2015 Board of Trustees meeting
- \$300K to remove Police and Security budget from colleges' parking program and moving it to District Office

3000 – Benefits - \$162,537 – see attached

- \$35K Human Resources & Health/Safety Restructuring Plan as approved on the June 11, 2015 Board of Trustees meeting
- \$140K to remove Police and Security budget from colleges' parking program and moving it to District Office

5000 – Other Expenses & Services - \$596,006 – see attached

- \$280K to budget for legal mandates such as Title IX & Affordable Care Act & implementation of new People Admin features to address ACCJC recommendations
- \$60K to budget for marketing to support colleges' enrollment growth
- \$60K to budget for phone which was inadvertently not budgeted at Tentative budget
- \$40K to budget for international student recruitment
- \$35K to budget for Board of Trustees for consultants and conferences
- \$91K to budget for tuition reimbursement for employees which was inadvertently not budgeted at Tentative Budget

7000 – Other Outgo - \$200,000

- To account for EDCT Foundation FY 2015-16 budget as approved on the January 15, 2015 Board of Trustees meeting which was inadvertently not budgeted at Tentative budget

Okay, so the District Office budget increase from tentative to final was \$1.3 million. Was this reviewed by District Budget Committee?

DBC reviewed the final recommendation for the resource allocation model along with the FTES projections and multi-year forecast, which includes the District Office expenditures, on August 20, 2015.

Some committee members feel the budget changes were not discussed with sufficient detail prior to implementation. This topic was again discussed, at length, during the October 15, 2015 DBC meeting. The committee talked about the time constraints that the District faces given the release of final budget numbers from the State Chancellor's Office at the end of July and the need to meet mid-August deadlines for preparing the budget for public review and submission to the Board of Trustees. To further challenge our efforts at collegial consultation, these dates coincide with the faculty's summer hiatus.

At its October 15 meeting, DBC members agreed on the following measures.

- Begin the budget cycle earlier than usual
- Continue to offer non-instructional pay for faculty during the summer
- Continue working with aligning program review with the budget

We strongly encourage these type of discussions and appreciate the different points of view.

These conversations are what will get us to have processes that we all agree are conducive of collegial consultation.

We would like to encourage faculty members to speak to their Academic Senate presidents about serving on the DBC. Currently there is one vacancy. Keep in mind that these meetings are open and one need not be a member to attend. Upcoming meetings are posted on the District [Master Calendar](http://www.sbccd.org) located at www.sbccd.org.

Finally, the committee agreed that the budget changes that occurred were necessary and, in fact, have already benefitted the District. We strongly encourage these type of discussions and appreciate the different points of view. These conversations are what will enable the District to develop processes that everyone can agree are conducive to collegial consultation.

I thank the DBC for creating an atmosphere where we can discuss difficult topics and where feedback is encouraged and appreciated.

Still have questions? Email them to us at kgoodric@sbccd.cc.ca.us and we'll do our best to answer them.

San Bernardino Community College District
Prior Year Budget vs. Prior Year Actuals vs. Tentative Budget vs. Final Budget

San Bernardino Valley College

Account Category	2014-15	2014-15	2015-16	2015-16
	Final Adjusted Budget	Unaudited Actuals	Tentative Budget	Final Budget
1000 - Academic Salaries	22,428,451	22,839,590	23,152,703	23,819,896
2000 - Classified Salaries	7,622,917	7,313,233	8,062,513	7,946,007
3000 - Benefits	8,611,461	8,281,701	9,236,844	9,194,340
4000 - Supplies	569,817	445,497	538,066	598,079
5000 - Other Expenses and Services	5,125,587	4,375,751	4,408,896	4,671,690
6000 - Capital Outlay	433,348	386,946	126,643	193,266
7000 - Other Outgo	163,193	163,193	-	6,716
Total Expenditures	44,954,774	43,805,911	45,525,665	46,429,994

Crafton Hills College

Account Category	2014-15	2014-15	2015-16	2015-16
	Final Adjusted Budget	Unaudited Actuals	Tentative Budget	Final Budget
1000 - Academic Salaries	10,449,399	11,139,985	11,389,960	11,455,010
2000 - Classified Salaries	4,722,299	4,755,277	4,902,523	4,776,107
3000 - Benefits	4,463,913	4,321,779	4,686,607	4,723,525
4000 - Supplies	213,938	135,138	237,754	226,939
5000 - Other Expenses and Services	1,387,897	1,268,214	1,628,531	1,967,013
6000 - Capital Outlay	59,054	31,473	45,850	41,065
7000 - Other Outgo	-	-	-	-
Total Expenditures	21,296,500	21,651,866	22,891,225	23,189,659

District Office

Account Category	2014-15	2014-15	2015-16	2015-16
	Final Adjusted Budget	Unaudited Actuals	Tentative Budget	Final Budget
1000 - Academic Salaries	538,096	594,507	771,325	669,610
2000 - Classified Salaries	5,403,241	5,612,966	6,145,792	6,596,434
3000 - Benefits	2,455,591	2,436,013	2,857,561	3,020,098
4000 - Supplies	252,564	198,679	241,482	243,587
5000 - Other Expenses and Services	5,114,320	4,520,739	4,123,955	4,719,961
6000 - Capital Outlay	261,594	200,771	224,047	223,100
7000 - Other Outgo	1,646,800	1,646,800	850,000	1,050,000 *
Total Expenditures	15,672,206	15,210,475	15,214,162	16,522,790

Notes:

* 7000 - Other Outgo includes KVCR and EDCT contributions (Line 71 at Tentative & line 73 at Final from RAM)

Source Documents:

Tentative Budget (pages 447-534)

<http://www.sbccd.org/~media/Files/SBCCD/District/Board/Agenda/2015/6-11-15.pdf>

Final Budget

<http://www.sbccd.org/~media/Files/SBCCD/District/Board/Agenda/2015/9-8-15.pdf>

Review of District Office proposed budget for FY 2015-2016 at District Budget Committee

[http://www.sbccd.org/~media/Files/SBCCD/District/District Committees/District Budget Committee/2015/2015-05-21%20District%20Office%20Expenses.pdf](http://www.sbccd.org/~media/Files/SBCCD/District/District%20Committees/District%20Budget%20Committee/2015/2015-05-21%20District%20Office%20Expenses.pdf)

San Bernardino Community College District
 Prior Year Budget vs. Prior Year Actuals vs. Tentative Budget vs. Final Budget
 District Wide

Prior Year Budget vs. Prior Year Actuals

Site	2014-15 Final Adjusted Budget	2014-15 Unaudited Actuals	Savings / (Excess)	Percent
SBVC	44,954,774	43,805,911	1,148,863	2.6%
CHC	21,296,500	21,651,866	(355,366)	-1.7%
District Office	15,672,206	15,210,475	461,731	2.9%
Total Expenditures	81,923,480	80,668,252	1,255,228	1.5%

Summary:

As a District, we saved \$1.3 million from our Final Adjusted Budget for FY 2014-15

Prior Year Budget vs. Current Year Budget

Site	2014-15 Final Adjusted Budget	2015-16 Final Budget	Increase / (Decrease)	Percent
SBVC	44,954,774	46,429,994	1,475,220	3.3%
CHC	21,296,500	23,189,659	1,893,159	8.9%
District Office	15,672,206	16,522,790	850,584	5.4%
Total Expenditures	81,923,480	86,142,443	4,218,963	5.1%

Summary:

As a District, we increased our operating budget by \$4.2 million from our Final Adjusted Budget for FY 2014-15

Prior Year Actuals vs. Current Year Budget

Site	2014-15 Unaudited Actuals	2015-16 Final Budget	Increase / (Decrease)	Percent
SBVC	43,805,911	46,429,994	2,624,083	6.0%
CHC	21,651,866	23,189,659	1,537,793	7.1%
District Office	15,210,475	16,522,790	1,312,315	8.6%
Total Expenditures	80,668,252	86,142,443	5,474,191	6.8%

Summary:

As a District, we are expected to spend an additional \$5.5 million from our FY 2014-15 Unaudited Actuals

Tentative vs. Current Year Budget

Site	2015-16 Tentative Budget	2015-16 Final Budget	Increase / (Decrease)	Percent
SBVC	45,525,665	46,429,994	904,329	2.0%
CHC	22,891,225	23,189,659	298,434	1.3%
District Office **	15,214,162	16,522,790	1,308,628	8.6%
Total Expenditures	83,631,052	86,142,443	2,511,391	3.0%

Summary:

As a District, we increased our operating budget by \$2.5 million from our 2015-16 Tentative Budget

Notes:

** Please see attached explanations since the Parking College budget was shifted to District Office

San Bernardino Community College District
 Prior Year Budget vs. Prior Year Actuals vs. Tentative Budget vs. Final Budget
 District Office

Prior Year Budget vs. Prior Year Actuals

Account Category	2014-15	2014-15	Savings / (Excess)	Percent
	Final Adjusted Budget	Unaudited Actuals		
1000 - Academic Salaries	538,096	594,507	(56,411)	-10.5%
2000 - Classified Salaries	5,403,241	5,612,966	(209,725)	-3.9%
3000 - Benefits	2,455,591	2,436,013	19,578	0.8%
4000 - Supplies	252,564	198,679	53,885	21.3%
5000 - Other Expenses and Services	5,114,320	4,520,739	593,581	11.6%
6000 - Capital Outlay	261,594	200,771	60,823	23.3%
7000 - Other Outgo	1,646,800	1,646,800	-	0.0% *
Total Expenditures	15,672,206	15,210,475	461,731	2.9%

Summary:

District Office had savings in FY 14-15 in the approximate amount of \$500 thousand from their final adjusted budget.

Prior Year Budget vs. Current Year Budget

Account Category	2014-15	2015-16	Increase / (Decrease)	Percent
	Final Adjusted Budget	Final Budget		
1000 - Academic Salaries	538,096	669,610	131,514	24.4%
2000 - Classified Salaries	5,403,241	6,596,434	1,193,193	22.1%
3000 - Benefits	2,455,591	3,020,098	564,507	23.0%
4000 - Supplies	252,564	243,587	(8,977)	-3.6%
5000 - Other Expenses and Services	5,114,320	4,719,961	(394,359)	-7.7%
6000 - Capital Outlay	261,594	223,100	(38,494)	-14.7%
7000 - Other Outgo	1,646,800	1,050,000	(596,800)	0.0% *
Total Expenditures	15,672,206	16,522,790	850,584	5.4%

Summary:

District Office increased their budget by approximately \$900 thousand from the prior year final adjusted budget

Prior Year Actuals vs. Current Year Budget

Account Category	2014-15	2015-16	Increase / (Decrease)	Percent
	Unaudited Actuals	Final Budget		
1000 - Academic Salaries	594,507	669,610	75,103	12.6%
2000 - Classified Salaries	5,612,966	6,596,434	983,468	17.5%
3000 - Benefits	2,436,013	3,020,098	584,085	24.0%
4000 - Supplies	198,679	243,587	44,908	22.6%
5000 - Other Expenses and Services	4,520,739	4,719,961	199,222	4.4%
6000 - Capital Outlay	200,771	223,100	22,329	11.1%
7000 - Other Outgo	1,646,800	1,050,000	(596,800)	0.0% *
Total Expenditures	15,210,475	16,522,790	1,312,315	8.6%

Summary:

District Office increased their budget by approximately \$1.3 million from the prior year actual unaudited actuals

Tentative vs. Current Year Budget

Account Category	2015-16	2015-16	Increase / (Decrease)	Percent
	Tentative Budget	Final Budget		
1000 - Academic Salaries	771,325	669,610	(101,715)	-13.2%
2000 - Classified Salaries	6,145,792	6,596,434	450,642	7.3%
3000 - Benefits	2,857,561	3,020,098	162,537	5.7%
4000 - Supplies	241,482	243,587	2,105	0.9%
5000 - Other Expenses and Services	4,123,955	4,719,961	596,006	14.5%
6000 - Capital Outlay	224,047	223,100	(947)	-0.4%
7000 - Other Outgo	850,000	1,050,000	200,000	0.0%
Total Expenditures	15,214,162	16,522,790	1,308,628	8.6%

Summary:

District Office increased their budget by approximately \$1.3 million from tentative to final budget **

Notes:

* 7000 - Other Outgo includes KVCR and EDCT contributions (Line 71 at Tentative & line 73 at Final from RAM)

** Please see attached explanations since the Parking College budget was shifted to District Office

San Bernardino Community College District
 Prior Year Budget vs. Prior Year Actuals vs. Tentative Budget vs. Final Budget
 San Bernardino Valley College

Prior Year Budget vs. Prior Year Actuals

Account Category	2014-15	2014-15	Savings / (Excess)	Percent
	Final Adjusted Budget	Unaudited Actuals		
1000 - Academic Salaries	22,428,451	22,839,590	(411,139)	-1.8%
2000 - Classified Salaries	7,622,917	7,313,233	309,684	4.1%
3000 - Benefits	8,611,461	8,281,701	329,760	3.8%
4000 - Supplies	569,817	445,497	124,320	21.8%
5000 - Other Expenses and Services	5,125,587	4,375,751	749,836	14.6%
6000 - Capital Outlay	433,348	386,946	46,402	10.7%
7000 - Other Outgo	163,193	163,193	-	0.0%
Total Expenditures	44,954,774	43,805,911	1,148,863	2.6%

Summary:

SBVC had savings in FY 14-15 in the approximate amount of \$1.2 million from their final adjusted budget

Prior Year Budget vs. Current Year Budget

Account Category	2014-15	2015-16	Increase / (Decrease)	Percent
	Final Adjusted Budget	Final Budget		
1000 - Academic Salaries	22,428,451	23,819,896	1,391,445	6.2%
2000 - Classified Salaries	7,622,917	7,946,007	323,090	4.2%
3000 - Benefits	8,611,461	9,194,340	582,879	6.8%
4000 - Supplies	569,817	598,079	28,262	5.0%
5000 - Other Expenses and Services	5,125,587	4,671,690	(453,897)	-8.9%
6000 - Capital Outlay	433,348	193,266	(240,082)	-55.4%
7000 - Other Outgo	163,193	6,716	(156,477)	-95.9%
Total Expenditures	44,954,774	46,429,994	1,475,220	3.3%

Summary:

SBVC increased their budget by approximately \$1.5 million from the prior year final adjusted budget

Prior Year Actuals vs. Current Year Budget

Account Category	2014-15	2015-16	Increase / (Decrease)	Percent
	Unaudited Actuals	Final Budget		
1000 - Academic Salaries	22,839,590	23,819,896	980,306	4.3%
2000 - Classified Salaries	7,313,233	7,946,007	632,774	8.7%
3000 - Benefits	8,281,701	9,194,340	912,639	11.0%
4000 - Supplies	445,497	598,079	152,582	34.2%
5000 - Other Expenses and Services	4,375,751	4,671,690	295,939	6.8%
6000 - Capital Outlay	386,946	193,266	(193,680)	-50.1%
7000 - Other Outgo	163,193	6,716	(156,477)	-95.9%
Total Expenditures	43,805,911	46,429,994	2,624,083	6.0%

Summary:

SBVC increased their budget by approximately \$2.6 million from the prior year actual unaudited actuals

Tentative vs. Current Year Budget

Account Category	2015-16	2015-16	Increase / (Decrease)	Percent
	Tentative Budget	Final Budget		
1000 - Academic Salaries	23,152,703	23,819,896	667,193	2.9%
2000 - Classified Salaries	8,062,513	7,946,007	(116,506)	-1.4%
3000 - Benefits	9,236,844	9,194,340	(42,504)	-0.5%
4000 - Supplies	538,066	598,079	60,013	11.2%
5000 - Other Expenses and Services	4,408,896	4,671,690	262,794	6.0%
6000 - Capital Outlay	126,643	193,266	66,623	52.6%
7000 - Other Outgo	-	6,716	6,716	100.0%
Total Expenditures	45,525,665	46,429,994	904,329	2.0%

Summary:

SBVC increased their budget by approximately \$904 thousand from tentative to final budget

San Bernardino Community College District
 Prior Year Budget vs. Prior Year Actuals vs. Tentative Budget vs. Final Budget
 Crafton Hills College

Prior Year Budget vs. Prior Year Actuals

Account Category	2014-15	2014-15	Savings / (Excess)	Percent
	Final Adjusted Budget	Unaudited Actuals		
1000 - Academic Salaries	10,449,399	11,139,985	(690,586)	-6.6%
2000 - Classified Salaries	4,722,299	4,755,277	(32,978)	-0.7%
3000 - Benefits	4,463,913	4,321,779	142,134	3.2%
4000 - Supplies	213,938	135,138	78,800	36.8%
5000 - Other Expenses and Services	1,387,897	1,268,214	119,683	8.6%
6000 - Capital Outlay	59,054	31,473	27,581	46.7%
7000 - Other Outgo	-	-	-	0.0%
Total Expenditures	21,296,500	21,651,866	(355,366)	-1.7%

Summary:

CHC had excess expenditures in FY 14-15 in the approximate amount of \$400 thousand from their final adjusted budget

Prior Year Budget vs. Current Year Budget

Account Category	2014-15	2015-16	Increase / (Decrease)	Percent
	Final Adjusted Budget	Final Budget		
1000 - Academic Salaries	10,449,399	11,455,010	1,005,611	9.6%
2000 - Classified Salaries	4,722,299	4,776,107	53,808	1.1%
3000 - Benefits	4,463,913	4,723,525	259,612	5.8%
4000 - Supplies	213,938	226,939	13,001	6.1%
5000 - Other Expenses and Services	1,387,897	1,967,013	579,116	41.7%
6000 - Capital Outlay	59,054	41,065	(17,989)	-30.5%
7000 - Other Outgo	-	-	-	0.0%
Total Expenditures	21,296,500	23,189,659	1,893,159	8.9%

Summary:

CHC increased their budget by approximately \$1.9 million from the prior year final adjusted budget

Prior Year Actuals vs. Current Year Budget

Account Category	2014-15	2015-16	Increase / (Decrease)	Percent
	Unaudited Actuals	Final Budget		
1000 - Academic Salaries	11,139,985	11,455,010	315,025	2.8%
2000 - Classified Salaries	4,755,277	4,776,107	20,830	0.4%
3000 - Benefits	4,321,779	4,723,525	401,746	9.3%
4000 - Supplies	135,138	226,939	91,801	67.9%
5000 - Other Expenses and Services	1,268,214	1,967,013	698,799	55.1%
6000 - Capital Outlay	31,473	41,065	9,592	30.5%
7000 - Other Outgo	-	-	-	0.0%
Total Expenditures	21,651,866	23,189,659	1,537,793	7.1%

Summary:

CHC increased their budget by approximately \$1.5 million from the prior year actual unaudited actuals

Tentative vs. Current Year Budget

Account Category	2015-16	2015-16	Increase / (Decrease)	Percent
	Tentative Budget	Final Budget		
1000 - Academic Salaries	11,389,960	11,455,010	65,050	0.6%
2000 - Classified Salaries	4,902,523	4,776,107	(126,416)	-2.6%
3000 - Benefits	4,686,607	4,723,525	36,918	0.8%
4000 - Supplies	237,754	226,939	(10,815)	-4.5%
5000 - Other Expenses and Services	1,628,531	1,967,013	338,482	20.8%
6000 - Capital Outlay	45,850	41,065	(4,785)	-10.4%
7000 - Other Outgo	-	-	-	0.0%
Total Expenditures	22,891,225	23,189,659	298,434	1.3%

Summary:

District Office increased their budget by approximately \$298 thousand from tentative to final budget

Baseline Comparison By Program

Budget Year: 2016, Expand To: Program, Only Changed: No
 Baseline 1: Tentative Budget 6/15/15
 Baseline 2: Final Budget 9/10/15
 Fund Or Site: - 01-00-03 - District Office
 Object Category Or Object: 2000's - Classified Salaries

Description	Tentative Budget 6/15/15	Final Budget 9/10/15	Difference	Percentage Difference
Fund 01 - General Fund - Unrestricted	6,139,967	6,596,434	(456,467)	93.08%
01-00-03 - District Office	6,139,967	6,596,434	(456,467)	93.08%
01-00-03-8103-0000-6150	346,479	346,479	0	0.00%
Distance Education - Acad Info Systems & Tech	346,479	346,479	0	0.00%
01-00-03-8115-0000-6010	45,998	45,998	0	0.00%
Professional Development Centr - Academic Administration	45,998	45,998	0	0.00%
01-00-03-8203-0000-6499	20,000	0	20,000	0.00%
Outreach And Recruitment	20,000	0	20,000	0.00%
01-00-03-9000-0000-6600	197,985	197,985	0	0.00%
District Chancellor	197,985	197,985	0	0.00%
01-00-03-9004-0000-6730	868,341	940,275	(71,935)	92.35%
Human Resources	868,341	940,275	(71,935)	92.35%
01-00-03-9005-0000-6770	93,762	150,462	(56,700)	62.32%
District Health & Safety	93,762	150,462	(56,700)	62.32%
01-00-03-9006-0000-6720	245,677	254,100	(8,423)	96.69%
Controller	245,677	254,100	(8,423)	96.69%
01-00-03-9007-0000-6770	342,289	342,289	0	0.00%
Purchasing And Warehousing	342,289	342,289	0	0.00%
01-00-03-9010-0000-6780	1,513,508	1,515,902	(2,395)	99.84%
Data Processing	1,513,508	1,515,902	(2,395)	99.84%
01-00-03-9014-0000-7100	0	26,431	(26,431)	0.00%
Facilities Planning/Adm.Svcs.	0	26,431	(26,431)	0.00%
01-00-03-9200-0000-6600	36,000	36,000	0	0.00%
Board Of Trustees	36,000	36,000	0	0.00%
01-00-03-9301-0000-6720	108,532	113,957	(5,425)	95.24%
Internal Audit	108,532	113,957	(5,425)	95.24%
01-00-03-9303-0000-6720	898,995	906,486	(7,491)	99.17%
Accounting	898,995	906,486	(7,491)	99.17%
01-00-03-9503-0000-6770	599,620	617,420	(17,800)	97.12%
Police	599,620	617,420	(17,800)	97.12%
01-00-03-9505-0000-6530	124,474	124,474	0	0.00%
Custodial	124,474	124,474	0	0.00%
01-00-03-9507-0000-6770	385,348	385,348	0	0.00%
Printing	385,348	385,348	0	0.00%
01-00-03-9509-0000-6710	120,000	135,000	(15,000)	88.89%
Marketing & Public Affairs	120,000	135,000	(15,000)	88.89%
01-00-03-9521-0000-6770	192,957	457,825	(264,868)	42.15%
Security	192,957	457,825	(264,868)	42.15%

Baseline Comparison By Program

Budget Year: 2016, Expand To: Program, Only Changed: No

Baseline 1: Tentative Budget 6/15/15

Baseline 2: Final Budget 9/10/15

Fund Or Site: - 01-00-03 - District Office

Object Category Or Object: 3000's - Employee Benefits

Description	Tentative Budget 6/15/15	Final Budget 9/10/15	Difference	Percentage Difference
Fund 01 - General Fund - Unrestricted	2,856,422	3,020,098	(163,676)	94.58%
01-00-03 - District Office	2,856,422	3,020,098	(163,676)	94.58%
01-00-03-8103-0000-6150	147,555	147,555	0	0.00%
Distance Education - Acad Info Systems & Tech	147,555	147,555	0	0.00%
01-00-03-8115-0000-6010	22,428	22,428	0	0.00%
Professional Development Centr - Academic Administration	22,428	22,428	0	0.00%
01-00-03-8115-0000-7010	28,033	28,033	0	0.00%
Professional Development Centr - Contract Education	28,033	28,033	0	0.00%
01-00-03-9000-0000-6600	134,001	134,001	0	0.00%
District Chancellor	134,001	134,001	0	0.00%
01-00-03-9003-0000-6099	97,477	78,566	18,911	124.07%
Collective Brgn/Dist Assembly	97,477	78,566	18,911	124.07%
01-00-03-9004-0000-6730	338,112	349,013	(10,901)	96.88%
Human Resources	338,112	349,013	(10,901)	96.88%
01-00-03-9005-0000-6770	23,558	47,309	(23,751)	49.80%
District Health & Safety	23,558	47,309	(23,751)	49.80%
01-00-03-9006-0000-6720	82,719	84,365	(1,646)	98.05%
Controller	82,719	84,365	(1,646)	98.05%
01-00-03-9007-0000-6770	144,820	144,820	0	0.00%
Purchasing And Warehousing	144,820	144,820	0	0.00%
01-00-03-9010-0000-6780	592,643	592,828	(184)	99.97%
Data Processing	592,643	592,828	(184)	99.97%
01-00-03-9014-0000-7100	0	8,065	(8,065)	0.00%
Facilities Planning/Adm.Svcs.	0	8,065	(8,065)	0.00%
01-00-03-9200-0000-6600	97,592	97,592	0	0.00%
Board Of Trustees	97,592	97,592	0	0.00%
01-00-03-9301-0000-6720	38,151	39,211	(1,060)	97.30%
Internal Audit	38,151	39,211	(1,060)	97.30%
01-00-03-9303-0000-6720	401,786	403,503	(1,717)	99.57%
Accounting	401,786	403,503	(1,717)	99.57%
01-00-03-9503-0000-6770	271,675	279,386	(7,712)	97.24%
Police	271,675	279,386	(7,712)	97.24%
01-00-03-9505-0000-6530	53,910	53,910	0	0.00%
Custodial	53,910	53,910	0	0.00%
01-00-03-9507-0000-6770	192,780	192,780	0	0.00%
Printing	192,780	192,780	0	0.00%
01-00-03-9509-0000-6710	11,875	11,875	0	0.00%
Marketing & Public Affairs	11,875	11,875	0	0.00%
01-00-03-9521-0000-6770	112,308	249,857	(137,550)	44.95%
Security	112,308	249,857	(137,550)	44.95%
01-00-03-9750-0000-6799	65,000	55,000	10,000	118.18%

Baseline Comparison By Program

Budget Year: 2016, Expand To: Program, Only Changed: No

Baseline 1: Tentative Budget 6/15/15

Baseline 2: Final Budget 9/10/15

Fund Or Site: - 01-00-03 - District Office

Object Category Or Object: 3000's - Employee Benefits

Employee Benefits	65,000	55,000	10,000	118.18%
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Baseline Comparison By Program

Budget Year: 2016, Expand To: Program, Only Changed: No
 Baseline 1: Tentative Budget 6/15/15
 Baseline 2: Final Budget 9/10/15
 Fund Or Site: - 01-00-03 - District Office
 Object Category Or Object: 5000's - Other Operating Expenses And Services

Description	Tentative Budget 6/15/15	Final Budget 9/10/15	Difference	Percentage Difference
Fund 01 - General Fund - Unrestricted	4,123,955	4,719,961	(596,006)	87.37%
01-00-03 - District Office	4,123,955	4,719,961	(596,006)	87.37%
01-00-03-8103-0000-6150	41,749	39,499	2,250	105.70%
Distance Education - Acad Info Systems & Tech	41,749	39,499	2,250	105.70%
01-00-03-8103-0000-6570	0	2,250	(2,250)	0.00%
Distance Education	0	2,250	(2,250)	0.00%
01-00-03-8115-0000-7010	480	480	0	0.00%
Professional Development Centr - Contract Education	480	480	0	0.00%
01-00-03-8203-0000-6499	58,050	98,050	(40,000)	59.20%
Outreach And Recruitment	58,050	98,050	(40,000)	59.20%
01-00-03-9000-0000-6600	73,517	97,365	(23,849)	75.51%
District Chancellor	73,517	97,365	(23,849)	75.51%
01-00-03-9004-0000-6730	574,890	854,440	(279,550)	67.28%
Human Resources	574,890	854,440	(279,550)	67.28%
01-00-03-9005-0000-6770	95,775	95,775	0	0.00%
District Health & Safety	95,775	95,775	0	0.00%
01-00-03-9006-0000-6720	280,905	280,905	0	0.00%
Controller	280,905	280,905	0	0.00%
01-00-03-9007-0000-6770	46,770	41,806	4,964	111.87%
Purchasing And Warehousing	46,770	41,806	4,964	111.87%
01-00-03-9010-0000-6780	1,116,810	1,176,810	(60,000)	94.90%
Data Processing	1,116,810	1,176,810	(60,000)	94.90%
01-00-03-9011-0000-6770	63,000	63,000	0	0.00%
Insurance	63,000	63,000	0	0.00%
01-00-03-9014-0000-7100	32,850	36,288	(3,438)	90.53%
Facilities Planning/Adm.Svcs.	32,850	36,288	(3,438)	90.53%
01-00-03-9200-0000-6600	118,845	154,045	(35,200)	77.15%
Board Of Trustees	118,845	154,045	(35,200)	77.15%
01-00-03-9301-0000-6720	134,637	136,570	(1,933)	98.58%
Internal Audit	134,637	136,570	(1,933)	98.58%
01-00-03-9303-0000-6720	357,929	358,222	(293)	99.92%
Accounting	357,929	358,222	(293)	99.92%
01-00-03-9503-0000-6570	0	1,412	(1,412)	0.00%
Police	0	1,412	(1,412)	0.00%
01-00-03-9503-0000-6770	263,199	261,913	1,286	100.49%
Police	263,199	261,913	1,286	100.49%
01-00-03-9505-0000-6530	3,030	3,030	0	0.00%
Custodial	3,030	3,030	0	0.00%
01-00-03-9506-0000-6510	95,220	95,220	0	0.00%
Maintenance	95,220	95,220	0	0.00%
01-00-03-9506-0000-6570	140,400	140,400	0	0.00%

Baseline Comparison By Program

Budget Year: 2016, Expand To: Program, Only Changed: No
 Baseline 1: Tentative Budget 6/15/15
 Baseline 2: Final Budget 9/10/15
 Fund Or Site: - 01-00-03 - District Office
 Object Category Or Object: 5000's - Other Operating Expenses And Services

Description	Tentative Budget 6/15/15	Final Budget 9/10/15	Difference	Percentage Difference
Maintenance	140,400	140,400	0	0.00%
01-00-03-9507-0000-6770	123,418	123,418	0	100.00%
Printing	123,418	123,418	0	100.00%
01-00-03-9508-0000-6770	27,630	32,541	(4,911)	84.91%
General Supplies & Services	27,630	32,541	(4,911)	84.91%
01-00-03-9509-0000-6710	188,100	248,511	(60,411)	75.69%
Marketing & Public Affairs	188,100	248,511	(60,411)	75.69%
01-00-03-9521-0000-6770	3,168	3,168	0	0.00%
Security	3,168	3,168	0	0.00%
01-00-03-9600-0000-6770	283,584	283,843	(259)	99.91%
Utilities-Central Services	283,584	283,843	(259)	99.91%
01-00-03-9750-0000-6750	0	91,000	(91,000)	0.00%
Employee Benefits	0	91,000	(91,000)	0.00%



Response to Team Recommendations and the Commission Action Letter for District Recommendations

Working Draft Version 1.6, Updated 08/14/15

Quoted from the Commission's Instructions: Response to Team Recommendations and the Commission Action Letter: Each recommendation identified by the Commission in its action letter should be identified and discussed. The report should describe the resolution of each recommendation, analyze the results achieved to date, provide evidence of the results, and indicate what additional plans the institution has developed.

District Recommendation #1

In order to meet the standards, the team recommends that the Board of Trustees examine its role in the development of policies and ensure that it acts in a manner consistent with its approved policies and bylaws. The team further recommends that the Board of Trustees take steps to ensure that all policies are developed or revised within the framework of the established input and participation process (III.A.3, III.A.3.a, III.D.3, IV.A.2, IV.B.1.e, IV.B.1.j).

Description of Resolution to District Recommendation #1

To respond to the Accrediting Commission for Community and Junior College's (ACCJC) District Recommendations, an ad-hoc task force was assembled which included representatives from the Board of Trustees, Chancellor, College Presidents, Academic and Classified Senates, Adjunct Faculty, California School Employees Association (CSEA) and California Teachers Association (CTA), Student Government, Human Resources, Research and Planning, Black Faculty and Staff, Latino Faculty and Staff, Accreditation Liaison Officers, and Business and Fiscal Services. The task force had three initial meetings of the full-task force in the month of April 2015 and several sub-task force meetings in May and throughout the summer. The full task force began meeting again in September of 2015 and monthly thereafter to monitor and provide feedback on the progress that was being made towards addressing the District recommendations.

The purpose of the initial three meetings in April were to analyze each of the District-level findings to:

- 1) distill what triggered the visiting teams' findings;
- 2) evaluate what needed to be done to address the findings;
- 3) identify resources, points of accountability, and timelines that will be necessary to address the findings;
- 4) and list what evidence would satisfy the visiting team to show we have addressed each recommendation.

The task force reviewed and collectively agreed to the following goals for the task force:

- 1) Develop a tactical plan that will enable the District to completely satisfy the ACCJC District Recommendations with evidence to support addressing the recommendations and satisfying the standards;
- 2) Develop a tactical plan that all constituent groups believe can satisfy the ACCJC District Recommendations;
- 3) Work as a team to communicate the work that has and will be done to re-instill confidence in our colleges' and district's ability to serve our community;
- 4) Develop a monitoring process that all constituency groups believe is accurate, timely, meaningful, and transparent.

The task force collectively identified the following deficiencies which was recognized as district shortcomings that needed to be addressed and which all believed led to the findings.

- 1) Lack of systematic and ongoing review of Board Policies/Administrative Procedures (BP/AP) within specified timeline, including:
 - a. no policy review in place for at least four years;
 - b. a last minute rush to do all BP/AP means that reviews could not be done in a meaningful way;
 - c. AP6610 (Local Hires) did not go through the agreed to process. It was rushed through

based on “business necessity;”

- d. Chancellor’s evaluation process which used a different process than was in BP/AP and then a revised BP/AP was approved after the fact.
- 2) No locally structured training or orientation for Board member exists.
- 3) The role of the Board President was not clearly defined and did not include the assurance of new Board member training nor ensuring that the Board was following their own policies and administrative procedures.

Subsequently, the task force openly and candidly discussed strategies for addressing these deficiencies. The corrective actions that were collectively recommended were:

- 1) To define timeline and systematic process for BP/AP review. The timing should be specific and achievable and include:
 - a. the monitoring and tracking of progress via checklists;
 - b. clear definitions and be communicated;
 - c. subject expert review and tracking;
 - d. tracking of the rationale for any changes;
 - e. watching for conflict with other BP/APs;
 - f. needing to make sure “current” policies are available online;
 - g. inclusion in the Board self-evaluation;
 - h. a clear definition of “Periodic Review.”
- 2) Board Training
 - a. The development of a local Board Handbook inclusive of training.
 - b. Develop a living and evolving list of what every Board member should know and be trained on.
 - c. Consideration for transition time between Board Presidents
- 3) Develop local Board President Training which should be included in overall Board Handbook/Training; should include clear language that Board President is ultimately responsible to orient new board members and student trustees.

During the month of May and throughout the summer, the sub-task force committees for the development of a Board Policy Manual and for the revision of the Board Policy and Administrative Procedures (BP/AP 2410) met. In both instances, representatives from the ACCJC District Task Force met with the District Assembly to request that the current BP/AP review process be placed on “pause” until a new process was developed and proposed for the Fall and that rather than approving the Board Handbook that was scheduled to be approved, they allow time for the ACCJC District Task Force to review and incorporate additional changes over the summer. Both requests were approved. It was also suggested, and agreed to, that the BP/AP review process be reviewed by joint sub-committees of the District Assembly and the ACCJC District Task Force.

The joint sub-committees of the District Assembly and the ACCJC District Task Force convened on two occasions and revised Board Policy and Administrative Procedures (BP/AP 2410) to incorporate the recommendations of the ACCJC District Task Force. These changes included establishing a defined timeline for BP/AP review (6 year review cycle), establishing points of accountability for the review process, developing a tracking system for the review cycle and rationale for BP/AP changes that is available for all to see online, ensuring input by subject area experts, and preventing conflicts with other District BPs/APs. Training sessions were then conducted with the individuals assigned as points of accountability for this new process. The training sessions included the prioritization of BP/APs based on those that were already under review prior to District Assembly putting the process on

“pause.”

The sub-task force committee working on the Board Handbook met to review the local handbook that was being proposed and incorporated the changes recommended by the ACCJC District Task Force. This included ensuring that the local handbook complimented, augmented, and expanded upon the Community College League of California (CCLC) Trustee Training, reviewing and adding to the list of topics all trustee members should be trained on, ensuring regular updating of the handbook, specifying Chancellor and Board President responsibilities, specifying when the training of board members is to occur, and incorporating a sign off sheet to verify the training of board members in each topic area.

Analysis of Results Achieved to Date

The SBCCD and its colleges fully recognized the rationale for the four District Recommendations. These recommendations highlighted issues the District has been cognizant of but have had challenges addressing. The recommendations provided by the visiting team were constructive, provided guidance, and an impetus for the SBCCD to finally put thoughts into action.

The SBCCD is proud of the transparent and consultative processes used to address this recommendation. All constituency groups had a spot at the table, opportunity for input, and played an integral role in identifying issues, proposing solutions to the issues, and in monitoring the progress made in addressing those issues.

All constituent groups approved and supported all steps in this process and the end result are solutions that they collectively feel fully address the ACCJC District recommendation. The solutions that have been implemented codify processes along with timelines and points of responsibility, and ensure ongoing transparency. The new BP/AP approval process and Board of Trustee Handbook are expected to be approved at the September District Assembly Meeting and become operational thereafter.

Evidence of the Results

- Minutes/Meeting Summaries from ACCJC District Task Force
- Notes from sub-committee meetings
- Minutes from District Assembly
- Minutes from Academic and Classified Senate Meetings
- Updated BP/AP 2410
- Tracking Spreadsheet for BP/AP Review
- Training attendance sheet for individuals assigned as points of accountability
- Update local Board Handbook

Additional Plans Developed by the SBCCD

District Recommendation #2

In order to meet the standards, the team recommends that the Board of Trustees, and the Chancellor, in consultation with the leadership of the college campuses, develop a strategy for addressing significant issues to improve the effectiveness of district human resource services that support the colleges in their missions and functions. These issues include:

1. Reliable data from the Human Resources Department to support position control and other human resources functions;
2. Timeliness of employee evaluations;
3. Responsiveness and improved timelines for employee hiring;
4. Consistent policy interpretation and guidance; and
5. Completion of the faculty evaluation instrument to include work on Student Learning Outcomes (III.A, III.A.1.b, III.A.1.c, III.A.5, IV.B.3.b).

Description of Resolution to District Recommendation #2

To respond to the Accrediting Commission for Community and Junior College's (ACCJC) District Recommendations, an ad-hoc task force was assembled which included representatives from the Board of Trustees, Chancellor, College Presidents, Academic and Classified Senates, Adjunct Faculty, California School Employees Association (CSEA) and California Teachers Association (CTA), Student Government, Human Resources, Research and Planning, Black Faculty and Staff, Latino Faculty and Staff, Accreditation Liaison Officers, and Business and Fiscal Services. The task force had three initial meetings of the full-task force in the month of April 2015 and several sub-task force meetings in May and throughout the summer. The full task force began meeting again in September of 2015 and monthly thereafter to monitor and provide feedback on the progress that was being made towards addressing the District recommendations.

The purpose of the initial three meetings in April were to analyze each of the District-level findings to:

- 1) distill what triggered the visiting teams' findings;
- 2) evaluate what needed to be done to address the findings;
- 3) identify resources, points of accountability, and timelines that will be necessary to address the findings;
- 4) and list what evidence would satisfy the visiting team to show we have addressed each recommendation.

The task force reviewed and collectively agreed to the following goals for the task force:

- 1) Develop a tactical plan that will enable the District to completely satisfy the ACCJC District Recommendations with evidence to support addressing the recommendations and satisfying the standards;
- 2) Develop a tactical plan that all constituent groups believe can satisfy the ACCJC District Recommendations;
- 3) Work as a team to communicate the work that has and will be done to re-instill confidence in our colleges' and district's ability to serve our community;
- 4) Develop a monitoring process that all constituency groups believe is accurate, timely, meaningful, and transparent.

The task force collectively identified the following deficiencies which was recognized as district short-

comings that needed to be addressed and which all believed led to the findings.

- 1) No reliable data for planning purposes, including:
 - a. Lack of Position Control Management;
 - b. Incorrect identification of funding sources (e.g. grants versus general funds);
 - c. No points of accountability in change process;
 - d. Lack of or inaccurate data such as updated organizational charts, directory information, and evaluation information (e.g. timelines, by whom, etc);
 - e. No meaningful employee demographic distribution data to use for staff planning.
- 2) Lack of Timeliness of Employee Evaluations
 - a. Brain Trust Report – Both colleges and District found to be behind in employee evaluations
- 3) Responsiveness/Timeliness of Hiring
 - a. Vacancies
 - i. Unclear on funded versus unfunded positions;
 - ii. Long-time to fill due to:
 1. Failed searches
 2. Time to set-up committees
 3. Time to start committee work
 4. Attendance by committee members
 5. Approval process – too long between board meetings
 6. Job description approval process takes too long
 7. Inadequate HR staffing
- 4) Inconsistency in policy interpretation
 - a. Different HR generalists have different interpretation of rules;
 - b. Lack of consistency in how positions are marketed;
 - c. Classified employee testing is not valid or consistent;
 - d. Appointment process to committees is unclear;
 - e. Training is not standardized or consistent for HR staff and committee;
 - f. Application of minimum degree requirement is inconsistent.
- 5) No tracking of SLO completion on faculty evaluation form.

Subsequently, the task force openly and candidly discussed strategies for addressing these deficiencies. The corrective actions that were collectively recommended were:

- 1) Continue to utilize and expand upon the functionality of the new budgeting system, Questica. Specifically, utilizing one system to handle Position Control Management allows for the reconciliation of positions between the District and the colleges through the Administrative Services offices and District Fiscal Services. The Questica system shows position status in real-time and accommodates for future planning (e.g. grants with multi-year funding and retirements);
- 2) Establish points of accountability where positions changes are to be submitted and who is to enter the changes into the system;
- 3) Define the data requirements needed by the colleges to anticipate position needs. This step is to be accomplished in two phases. The first phase is to create dashboards that link local data and data available through the State Chancellor's Data-Mart. The second phase will be to build in data dashboards directly into an Enterprise Resource Planning (ERP) system the District is currently preparing to put out an Request for Proposal (RFP) for;
- 4) Provide training to users on where this information is located, how to access it, and how to interpret and use the data within for planning purposes;

- 5) Consistent with the need for additional data, HR needs to reconcile positions with regard to whom employees report to, validate and codify the evaluation process ensuring alignment with Board Policy, and ultimately move to an integrated environment consistent with the District's intent to move to an ERP;
- 6) To improve the timeliness of evaluations, HR needs to reinforce the evaluation timelines with managers, validate reporting structures, and when notifying managers of which employees are to be evaluated, the Dean or next responsible managers are to be copied in the notification;
- 7) While Questica now addresses the concerns over which positions are funded versus unfunded, there is still a need to accommodate for forecasted positions not accounted for in Questica;
- 8) HR needs to codify the hiring process and provide consistent training to its staff, including mapping out each step in the hiring process, establishing time expectations, and identifying and eliminating bottlenecks. HR items should also be added to Board of Trustee Study Sessions to expedite hiring;
- 9) HR needs to codify their departmental rules and procedures, provide consistent and ongoing training to its staff, and work to reduce staff turnover;
- 10) HR needs to consult with managers on best marketing approaches based on the type of position they are recruiting for. Consistent with this recommendation, HR's budget needs to be augmented to accommodate for marketing needs;
- 11) To get better candidate pools, HR needs to ensure consistency in job description structure and instead of committee trying to come up with "related fields" prior to reviewing applications, HR should screen for degree minimum requirements and then committee considers appropriateness of degrees in conjunction with applicants' professional experience;
- 12) HR needs to evaluate the needs for classified testing as most managers have found the tests to not be valid based on the true expectations of the position they need to hire for;
- 13) HR needs to convene the "Tools" committee to address the Student Learning Outcome (SLO) requirement in faculty evaluations.

Analysis of Results Achieved to Date

The SBCCD and its colleges fully recognized the rationale for the four District Recommendations. These recommendations highlighted issues our District have been cognizant of but have had challenges addressing. The recommendations provided by the visiting team were constructive, provided guidance, and an impetus for the SBCCD to finally put thoughts into action.

The SBCCD is proud of the transparent and consultative processes used to address this recommendation. All constituency groups had a spot at the table, opportunity for input, and played an integral role in identifying issues, proposing solutions to the issues, and in monitoring the progress made in addressing those issues.

All constituent groups approved and supported all steps in this process and the end result are solutions that they collectively feel fully address the ACCJC District recommendation. The solutions that have been implemented codify processes along with timelines and points of responsibility, and ensure ongoing transparency.

I. Reliable data from the Human Resources Department to support position control and other human resources functions

1. Questica to ensure accurate funding and position control management is established.
2. Questica maintains budgeting aspects ensuring all management is aware of funding source for each position.
3. New position tracking system addresses how all positions and actions related to positions move through the system. The process includes a flow chart, personnel requisition form, and chancellor's cabinet approval form.
4. Organizational charts will follow BP3100. The annual notification is distributed to District Managers on annual basis from the Chancellor's office. Directory information will be maintained and updated by TESS. People Admin will address and assist in maintaining employee evaluation notifications to managers.
5. Employee demographic distribution data is maintained in EPICS and the SBCCD Informer Dashboard system. The data will be monitored by the Coordinator, Diversity and Talent Acquisition.

II. Timeliness of employee evaluations

1. People Admin will address and assist in maintaining employee evaluation notifications to managers. The software will include each position in accordance to the cycle they should be evaluated (e.g yearly, every other year, etc...). Once all current data is entered into the system it will maintain the information and provide timely notification.

III. Responsiveness and improved timelines for employee hiring

1. Questica is addressing funding of positions. Board items will include the specific funding sources.
2. (1) One mechanism to prevent failed searches includes more specific recruitment. The new coordinator position will assist in seeking and finding candidates in hard to fill positions; (2) Committees are now being set up and meeting while positions are still posting; (3) The 2nd meeting for committees occur after the position closes but now only requires one (1) meeting versus two after the position closes, which takes more time; (4) HR will be seeking input from supervisors, units and senates to establish standing committees to ensure better advance preparation for interview committees to improve attendance. (5) In the recruitment process, a prospective board meeting date will be selected to ensure board meetings are not missed based on hiring for targeted dates; (6) Job descriptions and contract language will need to be reviewed to ensure accuracy of process and related procedures. (7) The restructure/reorganization will be addressing the new staffing levels in HR (see attached HR Reorg/Restruct. Plan)

IV. Consistent policy interpretation and guidance

1. HR is establishing a guide/manual to assist in addressing process, procedure and policy interpretation.
2. HR will work with supervisors and staff on most appropriate marketing tools for unique positions. Branding, recruiting and marketing will be a key component for Coordinator, Diversity and Talent Acquisition.
3. Tests will be reviewed and updated by generalists under the guidance of the Director, HR.
4. Whenever possible, committees will be structured in advance to assist with clarity of appointments.
5. Training is being provided to staff based on specific needs within the position type
6. Minimum degree requirement will be based on job analysis study..

V. Completion of the faculty evaluation instrument to include work on Student Learning Outcomes (III.A, III.A.1.b, III.A.1.c, III.A.5, IV.B.3.b).

1. Negotiations will need to occur with CTA to include the new language and the appropriate placement on the form(s) and/or within the contract (e.g. article) as appropriate.

Evidence of the Results

I. Reliable data from the Human Resources Department to support position control and other human resources functions

- A. Position Tracking System (Attachment I)
- B. Board Policy 3100 – Organizational Structure; Annual notification from Chancellor’s office (Attachment II)
- C. Informer Dashboard – Demographic Data Analysis (Attachment III)

II. Timeliness of employee evaluations

- A. People Admin - Evaluation Tracking overview (e.g. Performance Management) (Attachment IV)

III. Responsiveness and improved timelines for employee hiring

- A. Vacancy tracking Spreadsheet (e.g. in part; time sensitive) to that includes data on committees, prospective board dates for hire, etc... (Attachment V).
- B. Human Resources Restructure/Reorganization (Attachment VI)

IV. Consistent policy interpretation and guidance

A. Job Analysis Questionnaire (Attachment VII)

V. Completion of the faculty evaluation instrument to include work on Student Learning Outcomes (III.A, III.A.1.b, III.A.1.c, III.A.5, IV.B.3.b).

A. Memorandum of Understanding to include SLOs in evaluations with future negotiated agreement of placement on form to be provided (Attachment VIII)

[Additional Plans Developed by the SBCCD](#)

DRAFT

District Recommendation #3

In order to meet the standards, the team recommends that the District follow their Resource Allocation Model focusing on transparency and inclusiveness, supported by a comprehensive district-wide Enrollment Management Plan and a Human Resource/Staffing Plan integrated with other district-wide programs and financial plans, broadly communicated to the colleges (III.A.6, III.D, III.D.1.a, III.D.1b, III.D.1.d, III.D.4, IV.B.3.c).

Description of Resolution to District Recommendation #3

To respond to the Accrediting Commission for Community and Junior College's (ACCJC) District Recommendations, an ad-hoc task force was assembled which included representatives from the Board of Trustees, Chancellor, College Presidents, Academic and Classified Senates, Adjunct Faculty, California School Employees Association (CSEA) and California Teachers Association (CTA), Student Government, Human Resources, Research and Planning, Black Faculty and Staff, Latino Faculty and Staff, Accreditation Liaison Officers, and Business and Fiscal Services. The task force had three initial meetings of the full-task force in the month of April 2015 and several sub-task force meetings in May and throughout the summer. The full task force began meeting again in September of 2015 and monthly thereafter to monitor and provide feedback on the progress that was being made towards addressing the District recommendations.

The purpose of the initial three meetings in April were to analyze each of the District-level findings to:

- 1) distill what triggered the visiting teams' findings;
- 2) evaluate what needed to be done to address the findings;
- 3) identify resources, points of accountability, and timelines that will be necessary to address the findings;
- 4) and list what evidence would satisfy the visiting team to show we have addressed each recommendation.

The task force reviewed and collectively agreed to the following goals for the task force:

- 1) Develop a tactical plan that will enable the District to completely satisfy the ACCJC District Recommendations with evidence to support addressing the recommendations and satisfying the standards;
- 2) Develop a tactical plan that all constituent groups believe can satisfy the ACCJC District Recommendations;
- 3) Work as a team to communicate the work that has and will be done to re-instill confidence in our colleges' and district's ability to serve our community;
- 4) Develop a monitoring process that all constituency groups believe is accurate, timely, meaningful, and transparent.

The task force collectively identified the following deficiencies which was recognized as district shortcomings that needed to be addressed and which all believed led to the findings.

- 1) Lack of communication as evidenced by raises being approved before notifying colleges of budget impact (no details shows on who got raises, retro pay, or impact on planning);
- 2) Lack of constituent understanding of new floating allocation model vs. "70-30 split;"
- 3) Lack of communication prior to modification of budgets;
- 4) Inconsistent use of numbers for Full Time Equivalent Student (FTES) assumptions;
- 5) Lack of communication from budget committee members to the college constituents they are

representing;

- 6) Lack of leadership in implementing resource allocation model;
- 7) Lack of clarity in budget numbers provided and issues impacting numbers.

Subsequently, the task force openly and candidly discussed strategies for addressing these deficiencies. The corrective actions that were collectively recommended were.

- 1) Though Board AP2610 (Presentation of Initial Collective Bargaining Proposals) as amended requires the Chancellor to provide advanced notice and forecasts to the Board of Trustees, there is also a need to provide the colleges with scenarios in advance, capitalizing on use of the campus budget committees;
- 2) Need documented process, guidelines, and training on how to implement resource allocation model, using "Guiding Principles" (e.g. SBVC must stay above 10,000 FTE, CHC needs to become financially self-sufficient.) and there is a need for the Chancellor and Vice-Chancellor of Fiscal Services to promote approved resource allocation model consistently and transparently;
- 3) Need to develop and use District Enrollment Management Plan;
- 4) Quarterly Newsletter from District Budget Committee and campus presentations;
- 5) Provide realistic scenarios in advance and adjust budget calendar to facilitate forecasting for the colleges.

Analysis of Results Achieved to Date

The SBCCD and its colleges fully recognized the rationale for the four District Recommendations. These recommendations highlighted issues our District have been cognizant of but have had challenges addressing. The recommendations provided by the visiting team were constructive, provided guidance, and an impetus for the SBCCD to finally put thoughts into action.

The SBCCD is proud of the transparent and consultative processes used to address this recommendation. All constituency groups had a spot at the table, opportunity for input, and played an integral role in identifying issues, proposing solutions to the issues, and in monitoring the progress made in addressing those issues.

All constituent groups approved and supported all steps in this process and the end result are solutions that they collectively feel fully address the ACCJC District recommendation. The solutions that have been implemented codify processes along with timelines and points of responsibility, and ensure ongoing transparency.

Through Board AP2610 (Presentation of Initial Collective Bargaining Proposals) as amended, requires the Chancellor to provide advanced notice and forecasts to the Board of Trustees. There is also a need to provide the colleges with scenarios in advance, capitalizing on use of the campus budget committees.

Furthermore, at its October 16, 2014 meeting, the District Budget Committee (DBC) approved the following recommendation to Chancellor's Cabinet:

*In accordance with the DBC charge as outlined in Administrative Procedure 2225:
"Union issues which are conducted as a part of labor negotiations are not a part of [the Budget] Committee's responsibility."
It is being recommended, however, that Fiscal Services be authorized to include various "what-if" assumptions regarding the impact of modifications to employee*

compensation (i.e. salaries, benefits, taxes, retirement costs, etc.), within illustrative financial forecasts such as the Resource Allocation Model. This will better enable committee members to participate in the financial planning and recommendation processes.

This recommendation was accepted by the Chancellor's Cabinet on October 27, 2014.

The District and Colleges meet regularly to discuss financial issues. The attendance to these meetings include the College Presidents, Vice Presidents of Administrative Services, Interim Director of Fiscal Services & Interim Vice Chancellor of Business & Fiscal Services.

At its May 21, 2015 meeting, DBC was asked to complete the annual Committee Self-Evaluation and later tallied (a total of 9 responses were received). The results of the Self-Evaluation was presented to DBC during the June 19, 2015 meeting. The Self-Evaluation showed that all respondents felt that DBC works collaborative, shares, its inclusive, open to input and respectful of diverse opinions during these meetings. Furthermore, 8 respondents agreed that the communication is easy to understand, clearly defined and transparent.

The District had been operating under the 70/30 split Resource Allocation Model (RAM) since 2010; however, this model was not addressing the needs of either college. Prior to fiscal year 2014-2015, DBC recommended the implementation of the new "floating" RAM as its first attempt to move away from the 70/30 split RAM in order to address the needs of the Colleges. The RAM was implemented; however, there was a lack of constituent understanding.

On October 2014, the Collaborative Brain Trust (CBT) completed a report on enrollment management for the San Bernardino Community College District. That report focused on four specific issues:

1. Development of a recommendation on full time equivalent student (FTES) goal distribution between the two colleges over the next five years.
2. Evaluation of the district's external data to be sure that FTES goal distribution recommendation is realistic.
3. Development of recommendations on how to increase instructional productivity (weekly student contact hours (WSCH)/full time equivalent faculty (FTEF).
4. Assessment of the processes and policies each college uses to manage its schedule and course offerings.

In response to the CBT report, the Chancellor formed a task force which was charged with developing a recommendation on FTES goal distribution between the two colleges. In order to maintain a collegial process, the task force included members from both colleges.

On April 16, 2014, the task force presented the DBC with its recommendation to modify the "floating" RAM to a more systematically model that could address the issues identified in the CBT report. DBC accepted this recommendation and recommended to Chancellor's Cabinet to revise the RAM Guidelines for FY 2014-15 and 2015-16 as originally recommended on 4/24/14; therefore, moving away from the "floating" RAM.

The District believes that this new RAM provides a comprehensive transparency, fairness, and ease of

understanding; and have the flexibility to adjust to changing circumstances, without the need for extensive debate and readjustment every fiscal year. As an example of the flexibility of this new RAM, at its July 16, 2015 meeting, the District Budget Committee (DBC) approved a recommendation to Chancellor's Cabinet to revise the RAM Guidelines for FY 2015-16 in view of the state's newly proposed growth formula.

To ensure that all constituents groups, including the Board of Trustees, were informed about the new RAM. The Interim Vice Chancellor of Business and Fiscal Services focused his Preliminary Budget Presentation on presenting the new RAM along with the collegial process during the past few months.

At its May 21, 2015 meeting, DBC was asked to complete the annual Committee Self-Evaluation and later tallied (a total of 9 responses were received). The results of the Self-Evaluation was presented to DBC during the June 19, 2015 meeting. The Self-Evaluation showed that all respondents felt that information is evidence-based was used during these meetings. Furthermore, 8 respondents agreed that the communication is easy to understand, clearly defined and transparent.

At its May 21, 2015 meeting, DBC was asked to complete the annual Committee Self-Evaluation and later tallied (a total of 9 responses were received). The results of the Self-Evaluation was presented to DBC during the June 19, 2015 meeting. The Self-Evaluation showed that all respondents felt that quality of information flow from the committee to the constituency groups is good to very good; all respondents agreed that the quality of information flow from the constituency groups to the committee was good to very good; and all respondents agreed that the quality of communication by the committee with the District community as a whole was good to very good.

DBC has provided the Chancellor with up to date information in regards to the various assumptions used for budget development in order for the Chancellor to incorporate into his Chancellor's Chat newsletter.

Furthermore, DBC will be presenting to the various constituency groups the new proposed RAM when school resumes for fall semester.

In response to the CBT report, the Chancellor formed a task force which was charged with developing a recommendation on FTES goal distribution between the two colleges. In order to maintain a collegial process, the task force included members from both colleges. This task force was led by the Interim Vice Chancellor of Business and Fiscal Services.

The Interim Vice Chancellor of Business and Fiscal Services has remain the chair of the District Budget Committee and continues to have the responsibility of clear communication, transparency, inclusiveness and evidence based information.

The Chancellor has presented the various assumptions used for budget development in his Chancellor's Chat newsletter at various occasions.

The Chancellor will present the new RAM during opening day at both colleges. The Interim Vice Chancellor of Business and Fiscal Services will lead the DBC presentation to various constituency groups around the District.

Evidence of the Results

- 1) Revise Board Policy
- 2) Documented process, guidelines, and training on resource allocation model;
- 3) Documented communication process that is clear and consistent as to how projections are being made;
- 4) #3 above and development of Enrollment Management Plan that links to Resource Allocation Model;
- 5) Quarterly Newsletter and minutes from presentations;
- 6) Minutes of Chancellor and Vice-Chancellor promoting resource allocation model;
- 7) Revised budget calendar;
- 8) Administrative Procedure AP 2610:
<http://www.sbccd.org/~media/Files/SBCCD/District/Board/Board%20Procedures/2000/AP%202610%20Presentation%20of%20Initial%20Collective%20Bargaining%20Proposals%203-12-15.pdf>
- 9) District Budget Committee Recommendation #FY2015-01:
<http://www.sbccd.org/~media/Files/SBCCD/District/District%20Committees/District%20Budget%20Committee/Recommendations/Budget%20Committee%20Recommendation%20FY2015-01.pdf>
- 10) Agendas from College/District Business & Fiscal Services meetings
- 11) June 18, 2015 District Budget Committee Agenda with minutes:
<http://www.sbccd.org/~media/Files/SBCCD/District/District%20Committees/District%20Budget%20Committee/2015/2015-06-18%20Minutes%20-%20Approved.pdf>
- 12) Enrollment Management Task Force - Recommendation to DBC for FY 15-16:
<http://www.sbccd.org/~media/Files/SBCCD/District/District%20Committees/District%20Budget%20Committee/2015/2015-04-16%20Enrollment%20Management%20Task%20Force%201%20Proposal%20to%20DBC.pdf>
- 13) District Budget Committee Recommendation #FY2015-05:
<http://www.sbccd.org/~media/Files/SBCCD/District/District%20Committees/District%20Budget%20Committee/Recommendations/Budget%20Committee%20Recommendation%202015-05%20on%20Revised%20RAM%20Guidelines%20for%20FY%202014-15%20and%202015-16.pdf>
- 14) District Budget Committee Recommendation #FY2016-01:
<http://www.sbccd.org/~media/Files/SBCCD/District/District%20Committees/District%20Budget%20Committee/Recommendations/Budget%20Committee%20Recommendation%202016-01%20on%20Revised%20RAM%20Guidelines%20for%202015-16%20-%20Approved.pdf>
- 15) 2015-07-16 Tentative vs Final FTES Distribution Growth:

http://www.sbccd.org/~media/Files/SBCCD/District/District_Committees/District_Budget_Committee/2016/2015-07-16%20Tentative%20vs%20Final%20FTES%20Distribution%20Growth.pdf

16) May 28, 2015 Board Study Session - Preliminary Budget Presentation Study Session:

<http://www.sbccd.org/~media/Files/SBCCD/District/Board/Board%20Presentations/2015%20Presentations/5-25-15%20Preliminary%20Budget.pdf>

17) June 18, 2015 District Budget Committee Agenda with minutes:

http://www.sbccd.org/~media/Files/SBCCD/District/District_Committees/District_Budget_Committee/2015/2015-06-18%20Minutes%20-%20Approved.pdf

18) Chancellor's Chat Newsletter – Volume 5, Issue 11 - June 18, 2015:

<http://www.sbccd.org/~media/Files/SBCCD/District/Chancellor/Chancellors%20Chat/2015/61815%20Chancellors%20Chat.pdf>

19) District Budget Committee Presentation to various constituency groups:

[Coming soon](#)

20) District Budget Committee Roster:

http://www.sbccd.org/~media/Files/SBCCD/District/District_Committees/District_Budget_Committee/2015-16%20Membership%20Roster-June%202015.pdf

Additional Plans Developed by the SBCCD

District Recommendation #4

In order to improve effectiveness, the team recommends that the District develop a local Board orientation program to ensure that all members of the Board are adequately prepared to provide leadership appropriate to their role as Board members (IV.B.1.f).

Description of Resolution to District Recommendation #4

To respond to the Accrediting Commission for Community and Junior College's (ACCJC) District Recommendations, an ad-hoc task force was assembled which included representatives from the Board of Trustees, Chancellor, College Presidents, Academic and Classified Senates, Adjunct Faculty, California School Employees Association (CSEA) and California Teachers Association (CTA), Student Government, Human Resources, Research and Planning, Black Faculty and Staff, Latino Faculty and Staff, Accreditation Liaison Officers, and Business and Fiscal Services. The task force had three initial meetings of the full-task force in the month of April 2015 and several sub-task force meetings in May and throughout the summer. The full task force began meeting again in September of 2015 and monthly thereafter to monitor and provide feedback on the progress that was being made towards addressing the District recommendations.

The purpose of the initial three meetings in April were to analyze each of the District-level findings to:

- 1) distill what triggered the visiting teams' findings;
- 2) evaluate what needed to be done to address the findings;
- 3) identify resources, points of accountability, and timelines that will be necessary to address the findings;
- 4) and list what evidence would satisfy the visiting team to show we have addressed each recommendation.

The task force reviewed and collectively agreed to the following goals for the task force:

- 1) Develop a tactical plan that will enable the District to completely satisfy the ACCJC District Recommendations with evidence to support addressing the recommendations and satisfying the standards;
- 2) Develop a tactical plan that all constituent groups believe can satisfy the ACCJC District Recommendations;
- 3) Work as a team to communicate the work that has and will be done to re-instill confidence in our colleges' and district's ability to serve our community;
- 4) Develop a monitoring process that all constituency groups believe is accurate, timely, meaningful, and transparent.

The task force collectively identified the following deficiencies which was recognized as district shortcomings that needed to be addressed and which all believed led to the findings.

- 1) Lack of systematic and ongoing review of Board Policies/Administrative Procedures within specified timeline;
 - a. No policy review in place for at least 4 years;
 - b. Last minute rush to do all BP/AP means that reviews could not be done in a meaningful way;
 - c. AP6610 did not go through the agreed to process. It was rushed through based on "business necessity;"
 - d. Chancellor's evaluation process – Used a different process than was in BP/AP and then

approved new process after the fact

- 2) Currently, no locally structured training or orientation. Every trustee needs to know and follow their Board BP/APs. Need to know time sensitive BP/APs; No evidence of local, structured, and/or comprehensive training.
- 3) President of Board of Trustees should make sure the Board is following BP/APs. There is no specific Board President training.

Subsequently, the task force openly and candidly discussed strategies for addressing these deficiencies. The corrective actions that were collectively recommended were:

- 1) To define timeline and systematic process for BP/AP review. The timing should be specific and achievable and include:
 - a. the monitoring and tracking of progress via checklists;
 - b. clear definitions and be communicated;
 - c. subject expert review and tracking;
 - d. tracking of the rationale for any changes;
 - e. watching for conflict with other BP/APs;
 - f. needing to make sure "current" policies are available online;
 - g. inclusion in the Board self-evaluation;
 - h. a clear definition of "Periodic Review."
- 2) Board Training
 - a. The development of a local Board Handbook inclusive of training.
 - b. Develop a living and evolving list of what every Board member should know and be trained on.
 - c. Consideration for transition time between Board Presidents
- 3) Develop local Board President Training which should be included in overall Board Handbook/Training; should include clear language that Board President is ultimately responsible to orient new board members and student trustees.

During the month of April and May, the sub-task force committee for the development of a Board Policy Manual met. Representatives from the ACCJC District Task Force met with the District Assembly to request that rather than approving the Board Handbook that was scheduled to be approved, they allow time for the ACCJC District Task Force to review and incorporate additional changes over the summer. The request was approved.

The sub-task force committee working on the Board Handbook met to review the local handbook that was being proposed and incorporated the changes recommended by the ACCJC District Task Force. This included ensuring that the local handbook complimented, augmented, and expanded upon the Community College League of California (CCLC) Trustee Training, reviewing and adding to the list of topics all trustee members should be trained on, ensuring regular updating of the handbook, specifying Chancellor and Board President responsibilities, specifying when the training of board members is to occur, and incorporating a sign off sheet to verify the training of board members in each topic area.

[Analysis of Results Achieved to Date](#)

The SBCCD and its colleges fully recognized the rationale for the four District Recommendations. These recommendations highlighted issues our District have been cognizant of but have had challenges addressing. The recommendations provided by the visiting team were constructive,

provided guidance, and an impetus for the SBCCD to finally put thoughts into action.

The SBCCD is proud of the transparent and consultative processes used to address this recommendation. All constituency groups had a spot at the table, opportunity for input, and played an integral role in identifying issues, proposing solutions to the issues, and in monitoring the progress made in addressing those issues.

All constituent groups approved and supported all steps in this process and the end result are solutions that they collectively feel fully address the ACCJC District recommendation. The solutions that have been implemented codify processes along with timelines and points of responsibility, and ensure ongoing transparency. The new Board of Trustee Handbook is expected to be approved at the September District Assembly Meeting and become operational thereafter.

Evidence of the Results

- Minutes/Meeting Summaries from ACCJC District Task Force
- Notes from sub-committee meetings
- Minutes from District Assembly
- Minutes from Academic and Classified Senate Meetings
- Update local Board Handbook

Additional Plans Developed by the SBCCD