

**2023 Planning Memo #2**

Thursday November 16, 2023

Dear Campus Community,

Today we are delivering our second memo regarding our annual planning process. Thank you for your patience as we have been working diligently to gather and synthesize this information for you.

**Budget Modifications**

It is because of the engagement and work of the budget managers, combined with input from staff across departments at the College, that we at Shoreline have been able to create a comprehensive view of our overall fiscal needs. We want to thank everyone for sharing your institutional knowledge, and for your time in creating a Budget Plan which has been approved by the Board of Trustees.

Our goal was to construct a process which would largely correct budget errors from last year and, within our limited means, create budgets that better reflect the needs in each area of the College. To do this we employed a strategy called “incremental budgeting” which means we examined the amount spent last year and used it as a starting point for the current year’s budgeting conversations.

When a budget is created each year, estimates are made for what each area expects to spend. As we go through the annual budget review process, we determine if the estimated amounts are correct, or if each area has over or underspent. If over/underspending occurs, budget adjustments need to be made and taken into consideration for the future. If we were to have approved all the adjusted amounts for this year, then the total budget amount would have equaled $55,048,640. This would have been an amount equal to $1,167,025 over the Board approved amount of $53,881,615.

However, through the diligent work of our budget managers and the Budget Office in locating expected reductions in needed costs throughout the departments, we were able to reduce our adjustments, so the total budgeted amount equaled $53,990,330, which is a difference in the amount of $108,715 and within the 1% flexible budget authority granted by the Board of Trustees.

The Executive Team and Area-Leads met with the Budget Office to review every area line-by-line given the total budgeted amount we could work within. In this analysis, several improvements were made to last year's rollover budget. These included items like:

* Corrections for costs on salaries that were inaccurate
* Adjustments for expenses charged to incorrect departments
* Reduced budgets in areas where budgeted amount was no longer needed
* Reviewed and updated budgets to align with new managers and appropriate areas
* Improved our expense transfer process which allows us to align expenses with the right budget amount for improved tracking

This year's work is moving us toward a process where all of us can be better stewards of our own budgets. As stated in the Strategic Planning Budget Council (SPBC’s) [guiding principles](https://shorelineccwa.sharepoint.com/%3Aw%3A/s/InstitutionalPlanning/EaGZ33JcqrhFiFRwzNu88rYBDecxsswW2B7j2oszvG4zAA?e=BVvobR), the budget is the responsibility of the campus as a whole. Though we weren’t able to say yes to everything, we are continually looking for avenues (e.g., grants, alternate contracts, community partnerships) so that we can say yes to items that serve our community and are reflections of our goals and planning. Until then, we thank you for your partnership in realizing our strategic budget plan and ensuring that we are good fiscal stewards for the College.

We will continue to finetune and improve processes as we go. This fiscal year we will add:

1. Proactive monthly reporting from the budget office
2. Controls to prevent overspending
3. Increased communication with the Budget Office: The Budget Office will make departmental budget changes after consulting with the budget manager.

Thank you to everyone for being integral to this process, and for sharing your knowledge with us so that we can better serve our students and our community.

**Budget uploads should be available in ctcLink later this month.**

**Annual Planning**



Perhaps the most important part of the Annual Planning process is ensuring that each area has the structure, support, and plan to work on area goals throughout the year to ensure they move their goals forward. To aid with this process:

* The Executive Team has prioritized big picture projects based on your suggestions in the Area Reviews (see chart below).
	+ Please note that these are *big picture* projects only; however, there are many smaller projects happening within areas per the Area Reviews. For Instruction and Student Services, because there is so much work happening and projects ongoing, we have tried to capture “themes” vs. specifics the way we did in other units. The specifics are reflected in the [Area Reviews](https://shorelineccwa.sharepoint.com/%3Ax%3A/s/InstitutionalPlanning/EXkJvQoNvaFEi4ZO5xZ7it0BW28uu2JSJjJIijELrnecgw?e=nMF6IZ&nav=MTVfezI0N0RERUY4LUQ5QTEtNEVCMC04MERGLTlBQzA5NjhBMTA2Q30) for those units, of course. There just wasn’t room to capture them all here.

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|  **Annual Planning Projects** |
| **Area** | **Project Name** | **Description** | **Presidents Goals** |
| Budget | Automated Budget Status Reporting. | Implement a "push" of budget status reports to budget managers monthly. | Communication |
| Budget | Budget Funds Availability Checking. | Activate budget funds available, non-sufficient funds (NSF) checking in cTcLink. | Infrastructure |
| Budget | Budget Development Transparency and Stakeholder Engagement. | Develop published annual budget process and timeline that includes stakeholder input and meets accreditation standards | Communication/Infrastructure |
| C&M | New Web Update Management Process  | Create training and implementation process to launch Shared Web Update Process with reps across campus | Communication/Infrastructure |
| C&M | Targeted marketing plan | Created Targeted Marketing Campaigns to help meet strategic enrollment goals | Communication/DEIA |
| C&M | CRM Streamlining | Clean up student communication by streamlining existing student communication platforms down to a much more manageable number | Communication |
| C&M | Virtual Tour | Research and launch a virtual campus tour for prospective students as per our innovation grant | DEIA, Communication |
| College Council | Participatory Governance  | Work with Constituent groups reps to bring a model to campus | Infrastructure |
| DEIA | PD for campus | Ensure compliance with legislation for staff & student DEI training | Training |
| DEIA | DEI Legislation | Ensure compliance with ell DEI legislation | Training |
| DEIA | Colocation Project | Find space for Workforce/Centers to collaborate | DEIA |
| DEIA | Antiracist Framework | Incorporate Antiracist Framework in College Initiatives | DEIA |
| DEIA | Naming Project & Beyond | Work with Native community to provide continued guidance and direction for Capital projects | DEIA |
| DEIA | Antiracist Policy  | Work with Constituent Groups to advance Anti-racist Policy  | DEIA |
| Facilities (Custodial, Grounds, Maintenance) | Stakeholder service and engagement | Fully staff position vacancies to support and maintain a clean, safe, and welcoming environment. | Infrastructure/DEIA |
| Facilities (Custodial, Grounds, Maintenance) | Enhance Professional Development | Work with Pro-D committee to determine and plan training for job requirements, operational safety, and enhancing skills sets. | Training |
| Facilities (Custodial, Grounds, Maintenance) | Capital Renewal Plan | Develop building and infrastructure maintenance, repair, and prioritization plan. | Infrastructure |
| Financial Services | Financial Statement and Audit Completion | Complete FYE 6/30/2023 annual financial statements and audit prior to the April 2024 Accreditation Visit | Infrastructure |
| Financial Services | Stakeholder service and compliance | Fill vacant positions to stabilize core financial, budget, and compliance functions of the College | Infrastructure |
| Financial Services | Enhance Professional Development | Engage in prof. dev. and training on core cTcLink financials processes, accounting pronouncement changes, and effective compliance controls. | Training |
| Foundation | Annual Fund | Create and implement an annual giving plan that increases the amount of unrestricted dollars that come to the foundation. | Infrastructure |
| Foundation | Scholarship Equity | Evaluate scholarship and emergency aid distribution for equity and assess current model of how scholarship information and emergency assistance is disseminated on campus.  | DEIA |
| Foundation | Foundation Infrastructure Review | Revise job descriptions to prioritize fundraising and advancement duties and to reflect common small shop Foundation staffing models more accurately | Infrastructure |
| Human Resources | Annual Pro-D calendar/reporting and self-reporting.  | Develop/post annual Pro-D offerings and report to College Council on progress. | Training |
| Human Resources | Creation of Employee Engagement Committee. | Create/implement a calendar of campus engagement events.  | Infrastructure |
| HR - Security  | Emergency Drills | Bring back quarterly/annual fire drills. Identify/train Building Marshals.  | Infrastructure |
| IE | IE funding model benchmarking | Research best practices with area colleges to incorporate more long-term planning and strategy in IE funding model | Enrollment/Infrastructure |
| IE | Pursue new overseas partnerships | Strengthen existing partnerships and pursue new ones that allow Shoreline to continue to attract international students from around the world.  | Enrollment |
| IE | Update IE marketing plan | Update marketing plan that allows SCC to be more effective in our diverse overseas markets.  | Communication |
| IE | Expanding global engagement with community partners | Proactively engage with new local communities that have global ties as a way of attracting local communities to our campus and exploring opportunities to collaborate | Community Engagement |
| IE | Enhance global engagement on campus | Provide opportunities for campus for more global awareness and engagement. | Community Engagement |
| Inst. Advancement | Support cultural events for public | Increase knowledge of and opportunities for diverse lectures, programs, films, and other activities that draw the public to campus. | Community Engagement, DEIA |
| Inst. Advancement | Draft community communications plan | Work with Communications & Marketing to Improve and deliver a campus wide calendar that can be used to market and promote on campus activities that are open to the public | Communications/Community Engagement |
| Instruction | Increase enrollment of underrepresented populations in high-demand areas | Enrollment (into benefits programs associated across workforce funding programs) and retention initiatives in all programs, but focused on high-demand programs – While working to close success gaps, improve opt-in opportunities and cross training among TANF, BFET, Worker Retraining, etc.  | Enrollment, DEIA |
| Instruction | Learning Resources - building capacity through improved processes and cross-training | Consider vacant positions across instructional units, solicit feedback on efficiencies and supports needed (to include cross-training) so they the College can serve students more effectively. | Enrollment, DEIA |
| Instruction | Improve Program Pathways | 1. As part of the cyclical review process, consider and update pathways to build enrollment in programs both Prof Tech and Transfer. Improve transitions from (2) Adult Basic Education/English as a Second Language into college-level coursework, focusing efforts on under-represented students in high demand fields where wages provided improved quality of life and access to healthcare; (3) Reduce redundancy of degrees without eliminating access to career clusters and embed short-term certificates so students have earlier access to employment while pursuing degree or transfer opportunities
 | Enrollment, DEIA |
| Office of the President | Internal President Connections | Increase in number of appointments the President has had with members of the community (including virtual office hours attendance) | Communication |
| Office of the President | Campus Event Participation | Increase number of attendees to campus events as compared to the previous year.  | Communication |
| Office of the President | President’s Office Focus Group | Conduct focus groups for feedback in spring 2024. | Communication |
| Office of the President | Coffee/Food to campus | Bring coffee and food service back to campus  | Infrastructure |
| Parent Child Center | Full childcare classroom availability | Fully staff the Parent Child Center (PCC) to operate at maximum capacity to serve the community | Infrastructure/Community Engagement |
| Parent Child Center | Professional Dev. & Required Training | Bring PCC staff current and fully document required licensing trainings. | Training |
| Parent Child Center | Family Engagement | Enhance opportunities for family engagement, i.e. parents, grandparents, to support the mission of PCC. | Communication/Community Engagement |
| PIE | Accreditation Mid-Cycle Visit | Prepare campus for accreditation site visit (April 18-19, 2024) with a mock visit and study guides. | Infrastructure |
| PIE | Accreditation Mid-Cycle Report | Prepare accreditation report by the due date of March 7, 2024, with a draft sent to NWCCU Liaison for feedback by February 1, 2024.  | Infrastructure |
| PIE | Culture of accreditation | Foster a culture of accreditation, assessment, and continuous improvement via the Accreditation & Institutional Effectiveness Committee. | Infrastructure/Communication |
| PIE | Create Institutional Effectiveness team  | Create Planning & Institutional Effective (PIE) department. Within PIE, rebuild Institutional Research (IR) team and begin rebuilding data, reports, dashboards, and queries that were lost in ransomware incident in March 2023. | Infrastructure |
| PIE | Stabilize ctcLink | Continue to stabilize ctcLink/PeopleSoft operations via ctcLink Leadership Team. Institutionalize Business Analyst support network (staffing, as well as communications). | Infrastructure |
| PIE | Grants to support President's Goals | Strategically pursue grant opportunities that support DEIA goals at the College.  | DEIA |
| Printing Services | Restore Printing Services hardware. | Fully reintegrate hardware to efficiently and effectively serve stakeholders. | Infrastructure |
| Printing Services | Rebuild Printing Services Design Capability | Rebuild online design and support capability to serve stakeholders efficiently and effectively. | Infrastructure |
| Student Services | Revise New Student Orientation  | Launch optional Canvas-based New Student Orientation for new winter students | Infrastructure/Enrollment |
| Student Services/DEIA | Enhance Basic Needs planning and support | Hire Basic Needs Specialist this fall | DEIA |
| Student Services/Other Areas | Develop Near Term Student Retention Strategies | Implement weekly student retention activities each quarter, beginning Winter 2024 | Enrollment |
| Student Services | Draft/revise student service policies and procedures | Develop/update at least three policies/procedures per quarter | Infrastructure  |
| Student Services | Advising Enhancements Project | Develop new domestic advising model  | Enrollment/DEIA |
| TSS | Wired Network Rebuild | Replace and rebuild wired network and communications infrastructure. | Infrastructure |
| TSS | MS Teams VoIP Telecom Changeover | Modernize and improve telephone communications to increase availability and mobility for all users.  | Infrastructure |
| TSS | Cybersecurity Enhancements | Implement multi-layered cybersecurity standards and best practices to protect college information, assets, and reputation. | Infrastructure |
| VP-BAS Office | Financial and Budget Department Review | Review current division's organizational structure and propose reorganization ideas to consider how to improve critical processing, compliance, and efficiencies to support the College's mission and President's Strategic Goals. | Infrastructure |

Each ET representative will work with faculty, budget managers, and staff on the items listed above and will continue to prioritize items within their respective units, updating the campus regularly about their progress. Updates will be delivered:

* In monthly Community Meeting
* In weekly emails (as appropriate)
* In monthly Faculty Program Coordinator (FPC) and Division Planning Committee (DPC) meetings
* At Faculty Senate Council, when Dr Rucks and I visit

The Office of Instruction also will host monthly Faculty Planning Coordinator (FPC) meetings to facilitate workshops to monitor progress and goal plan for the future. Through the Area Review process for 2024/25, we will first consider interventions implemented in the last year, and then utilizing new data in concert with last year’s review, we will make requests for faculty positions and equipment for 24/25. From there, the monthly meetings will focus on completing the 24/25 Area Reviews to ensure that learning outcomes assessment, curriculum, and other faculty projects move forward with support.

**Recruitment & Hiring Updates:**

Per [Planning Memo #1,](https://daag.shoreline.edu/2023/09/29/message-from-the-president-2023-planning-memo/) the College already has begun moving forward with the following position requests approved in the 2023/24 budget process:

1. Hiring of additional Student Ambassadors/Peer Mentors for International Education
2. Increasing the Senior Graphic Designer back to 100% FTE Funding
3. Reclassifying Financial Aid Staff (from Customer Service Specialist 2 to Program Specialist 2 positions)
4. Hiring a new Campus Security Officer position

Executive Team (ET) also has been able to pool together temporary funding (primarily from Guided Pathways funds and a small amount of operational funds which we hope will be reimbursed by Title III grant funds) for a 2nd Research Analyst position in Planning & Institutional Effectiveness (PIE) (this was #1 on the unfunded prioritized position requests) which will focus on rebuilding data, reports, and dashboards lost in the ransomware incident- all of which is needed for grant reporting, as well as accreditation purposes.

Moving forward, to ensure the College is completing thoughtful and consistent analysis around personnel recruitment requests and is working within our allocated budget, ET has authorized the creation of a “Hiring Criteria” form for completion by position supervisors when requesting approval to recruit for a vacant position. The Hiring Criteria form will be supplemental to the Personnel Requisition form and used by ET to evaluate requests for recruitment of both new and replacement positions.

Criteria considered when determining if a position will be filled include such things as whether the position is legally/contractually required, how it supports the President’s Goals, whether similar positions exist already, impact if the position is not filled, etc. Should a position not be approved to move forward with recruitment, the funding will then be applied to the remaining unfunded prioritized position requests from the 2023-24 budget request process. The position also may be determined to be funded at a later time depending on the urgency of the positions on the priority list.

Lastly, the College will continue to assess our fiscal situation at the end of each quarter to determine if new funding (from revenue, etc.) is in place and could potentially be applied to remaining unfunded, prioritized position needs. Updates regarding new funding for positions will continue to be shared via campus updates and Planning Memo communications.

**Conclusion**

Once again and I would like to thank you for your time and attention to this new planning process. I know it took a lot of effort from everyone, but I truly believe that it will make the College stronger. I am excited to see your projects come to fruition so that we may better serve our students and our community, and I look forward to seeing what the future holds.

Best Wishes,

Jack