2013/2014 GRCC Team Charter

Team Name: Budget Review Committee
Team Leader: Jim Peterson and Greg Forbes, co-chairs

Chartering is a two-way process
Team sponsor(s) specify the mission of the team, its resources, the expectations for what the team is to accomplish, the timelines, decision-making authority, and how the team relates to the broader College strategy and goals.

The team itself thinks through and creates a draft charter, including team goals, stakeholder requirements, and strategies for goal accomplishment.

Together, they review and finalize the team charter, adding the process that will be used to review team progress on a regular basis.

1. Purpose of the Team (What is this team expected to accomplish?)

The Budget Review Committee was charged to follow a proactive process to review the budgets of all programs and services at GRCC, both instructional and non-instructional. Based on a review of documents completed by individual units, the Budget Review Committee makes one of the following recommendations: a) enhance the funding level of the program/service; b) maintain the program/service at the current funding level; c) reduce the funding level of the program/service; or d) eliminate the program/service.

2. Decision-making Context and Scope (What level of decision making authority does this team hold?)

This Committee makes recommendations to Executive Leadership.

3. Team Goals, Action Projects, and Timelines (How will this team proceed to accomplish their purpose? I.e. what will they do?)

Budget Reviews occur on a three-year cycle, with all units with budgets exceeding $100,000 being evaluated. EBCO’s create the cycle of review and designate specific units of analysis.

4. Stakeholders and their Key Requirements (For whom is this team doing their work? What do they want?)

Our stakeholders are many, and their requirements are varied. First of all, units undergoing analysis are our stakeholders, and their key requirement is a clear, easy-to-navigate, and transparent process. Executive leadership is also a stakeholder, and needs recommendations based on a consistent, established methodology and reliable, valid information upon which they can base decisions. Finally, students and our community are stakeholders, and they need the process to promote fiscal responsibility at the College that they support through tuition and tax dollars.
5. **Resources Needed (both people and budget)**

This is a labor-intensive process. No new resource allocations have been made to accommodate this fact. Because terms of service will normally be two years, members have re-prioritized their work to make this assignment a priority for that period of time.

6. **Troubleshooting Path (How will unresolved issues or roadblocks be handled?)**

Challenges are normally resolved collaboratively. If major, substantive changes are necessary, they should be reported to the Strategic Leadership Team.

7. **Requirements for Integration with other Departments or Teams (How does this Team interface with others doing concurrent work?)**

As much as possible, the work of this committee will be integrated into the annual Budget Cycle at GRCC, allowing for the recommendations of the Budget Review Committee to be utilized at key times of the year by executive leadership.

8. **Review Progress (How and when will the work of this team be reviewed?)**

After each cycle of review, the process is assessed by the committee itself and survey feedback is invited from those units that undertook budget review in that cycle.

9. **Team Leader, Current Members, and Membership Specifications**

*Are team members appointed? Volunteers? Is team membership permanent? Term-limited? Is this team accepting new members? Please also list the current members on the Team by name.*

Members are appointed by the President for one and two-year terms. They represent a cross-section of the College. The terms of initial appointments were staggered to ensure the smooth, ongoing functioning of the team. Membership for 2014:

- Faculty (2-year term) – Greg Forbes, co-chair
- Faculty (2-year term) – Jeff Spoelman
- Meet and Confer (2-year term) – Klaas Kwant
- Educational Support Professionals (1-year term) – Lorena Aguayo
- Campus Police (1-year term) – Kay Newberry
- CEBA (2-year term) – Hayden Butcher
- Strategic Leadership Team (1-year term) – Felix Pereiro
- Academic Governing Council (2-year term) – Lynnae Selberg
- Deans’ Council (1-year term) – Dominic Dorsey
- Dean of Institutional Research & Planning (term not limited) – Donna Kragt
- Executive Director of Financial Services (term not limited) – Jim Peterson, co-chair
- Ex officio – Lisa Freiburger
10. List the major team accomplishments over the past year. *(What are your outcomes?)*

A total of 53 units have been reviewed through the winter semester of 2013. The committee also assessed its progress through self-reflection, discussion, and surveys, after which it implemented several process improvements, including: 1) reducing redundancy in response documents, 2) online scoring and comment collection, 3) “team-based” scoring to improve efficiency, and 4) offering both live and recorded orientation sessions.

11. List the major team goals for the upcoming year. *(What do you plan to accomplish as a team in 2013-2014?)*

After implementing process improvements based on feedback, the committee plans to review additional programs from across the College in the upcoming year. Reviews are scheduled in two cycles: one in Fall Semester and one in Winter Semester. In 2013-14, which will complete the first three-year cycle (see #3 above), the team will review 15 units in the Fall and 9 in the Winter, after which it will make its recommendations to executive leadership.

12. Please describe any current challenges the team is facing.

This is a very labor-intensive and complex process. Process improvement continues to be a focus of our work so that we can clarify, streamline, and simplify the process for units under review as well as for those scoring the responses and providing relevant feedback.