



Integrating Budget, Planning, and Assessment

Fall Conference FY 2025

Tuesday, September 17, 2024

More **communication** in general

More professionalism and an attitude of **service** not superiority. Please cooperate with other offices to achieve our shared goals. More **transparency** about where and how figures are derived. Help creating a budget that works and is understandable and not dictating.

I would love to see more focus on meeting college **strategic goals** and innovative concepts and less focus on risk aversion creating a reason to not do or try new things

Budgeting needs some improvements--need more, and more usable, **information** on a timely basis

No ability to understand budgets and what the rules are. It is so convoluted there is no way to understand what they are doing and how it all works. A **better understanding** of how it works would help other departments budget better and probably save the college quite a bit of money.

Business Services needs to take an approach of **collaboration** and service to internal customers. We should work as a team with them consulting us on budget and other issues. We resent the condescending and patronizing tone of language we sometimes receive (or witness internally). Please respond to requests for budget **training** and have basic and advanced levels of training.

Need to be a supporter of **academic goals** rather than a consistent blocker of them

Adopt a **customer service** mindset

Lacks collaboration, **RESPECT** for other staff



Budget Council, established February 2023

FACULTY

- Tyler Cox, Ag Science and Business, WW
- Lori Loseth, Biology, Clarkston

ADMIN/EXEMPT STAFF

- Mike Boogaard, Environmental Svcs Mgr, WW
- Chad Miltenberger, Dean of Clarkston Campus, Clarkston
- Magdalena Moulton, Asst Director of Fin Aid, WW

CLASSIFIED STAFF

- David Johnson, Surplus Inventory Control Spec 4, WW
- KT Peterson, Clarkston Campus Mgr, Clarkston

STUDENTS

- *Currently vacant*
- *Currently vacant*

With Non-voting Representation from:



Human Resources
VP of HR (vacant)
Stephanie Groom



**Equity, Diversity,
and Inclusion**
Dr. Allen Sutton



Technology Services
Mike Stocke
Luke Fidge

Chair

- Lori Peterson, Director of Budget and Fiscal Services

Co-Chair

- Rachel Warren, Fiscal Analyst 5 (Grants and Contracts)

Admin Support

- Morgan Sandvick, Fiscal Analyst 3 (Budget)

Executive Sponsor

- Pat Sisneros, VP of Administrative Services



Take-aways from FY25 Planning

Achievements

- **Defined participatory governance roles**
- **More communication / increased transparency**
- **Increased participation at the department level**
- **Developed Budget Values & Principles; Guiding principles for reviewing positions**

Opportunities for Improvement

- **Start the planning process earlier**
- **Stronger kickoff / more training opportunities**
- **Provide more data/context to those making recommendations/decisions**
- **Increase communication within divisions**
- **INTEGRATE WITH STEPS**



NEW: Budget Presentations

- **Each division will be allotted time for their departments to present budget requests before a panel consisting of Budget Council and the Executive Leadership Team**
- **Panelists can use this opportunity to ask clarifying questions to better understand budget requests**
- **Panel members will have a rubric based on the strategic plan to guide scoring of budget requests**
- **These presentations will be open to all employees who wish to observe**
- **Look for these 3-hour sessions, which will be held on Wednesday afternoons in January and February (1/22/25, 2/12/25, and 2/26/25)**



NEW: STEPS+Budget

- **STEPS is an integral piece of the annual planning process**
- **STEPS and budget submissions will have same due date**
- **The budget request form will be accessed from the annual STEPS reporting form**
- **Look for STEPS+Budget workshops this fall** *(2-4 pm 10/23/24, 10/30/24, and 11/20/24 in D185)*



Standardized Evaluation Services (STEPS) Annual

Purpose

To provide all programs and services at the college with a framework to evaluate contributions towards student success, identifying needs and setting priorities, and to work with the community to improve student success.



What is STEPS?

Standardized Evaluation of Programs & Services

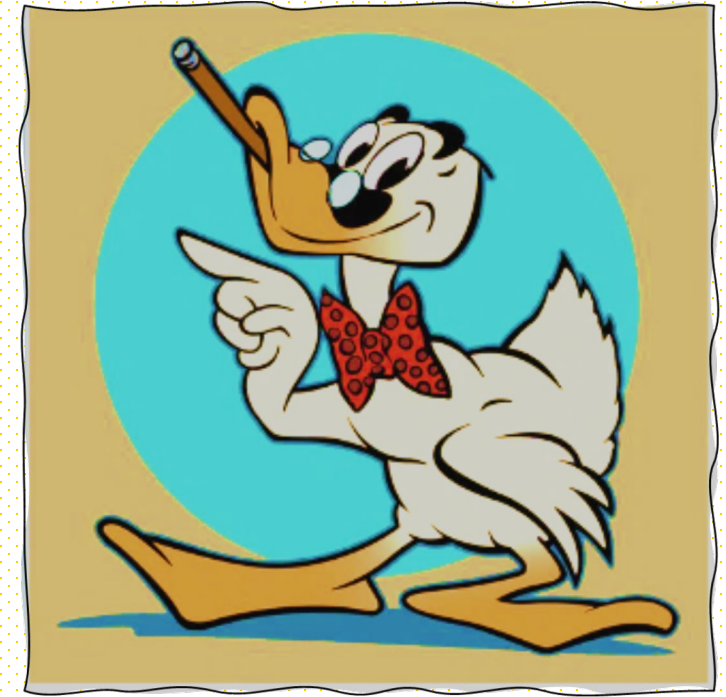
- Annual process (multiyear cycle in development)
- Cooperative Assessment:
 - ID strengths & weaknesses
 - Develop actionable plans for improvement
 - Reallocate resources—Budget Requests are now made through STEPS
- Holistic
 - Instruction
 - Student Services
 - College Operations

Ultimately, STEPS helps college leaders make informed decisions to benefit students



What's a Duck Program?

- Functional unit of activity that:
 - Holistically uses or creates resources towards a common purpose
 - Can engage in self study
- Tied to our academic structure
- Typically overseen by Director/Chair/Dean



If it looks like a duck

Work with your VP to identify your program!

STEPS Standards

Essential practices to enact good work

Come from practice and research

Informed by Council for the Advancement of Standards (CAS) in Higher Education

- 1. Mission**
- 2. Organizational Structure and Objectives**
- 3. Student Learning, Development, and Success**
4. Interpreting Information
5. Human Resources
6. Finances & Other Resources
- 7. Planning & Continuous Improvement**

Standards reported on annually are marked in blue



INTEGRATED PLAN BUDGETING

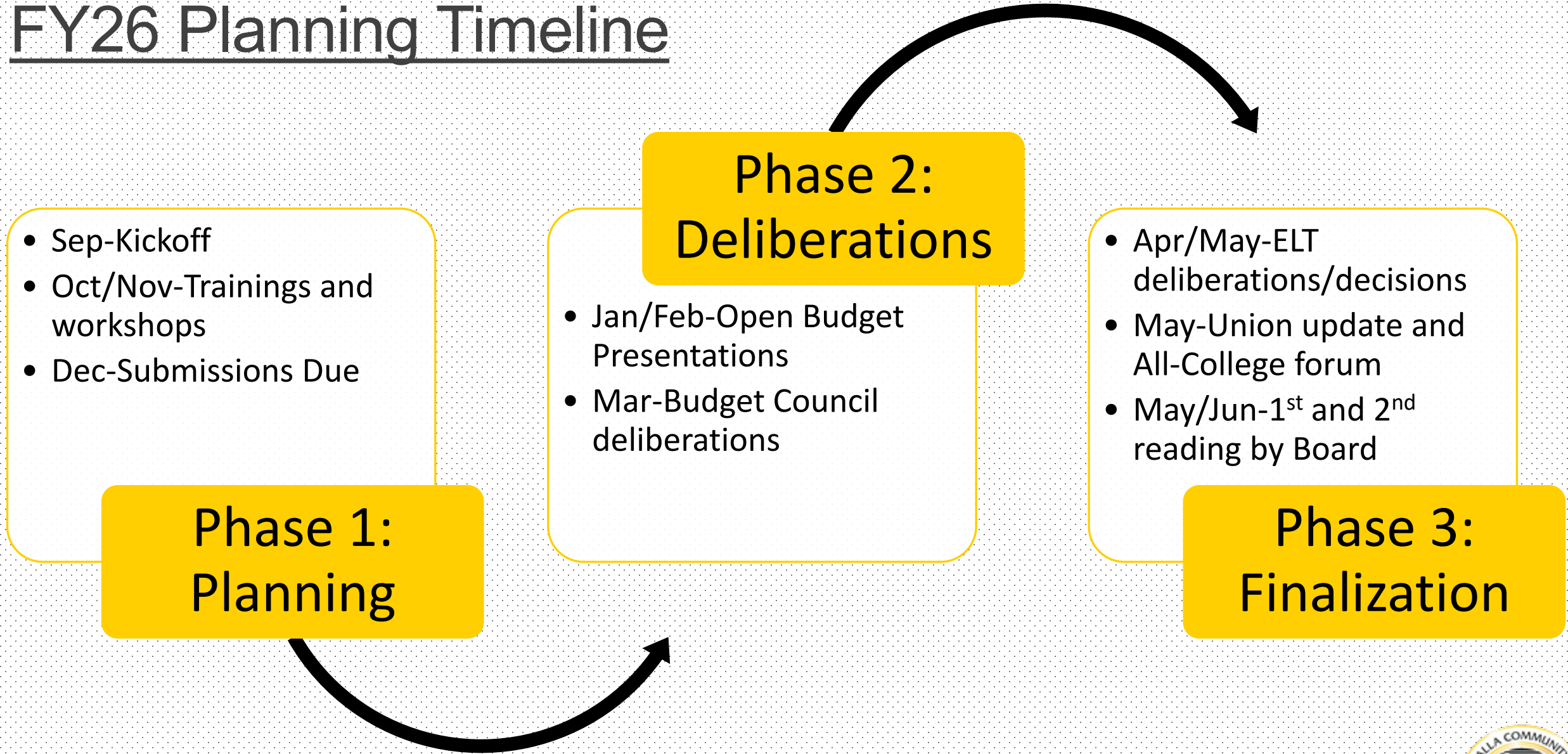
Annual Report Submission

- **Go to the Integrated Planning and Budgeting website:**
(<https://www.wwcc.edu/employees/integrated-planning-and-budgeting/>)
 - Will house all necessary materials in one place
 - Guidebook
 - Forms
- **Complete a STEPS report**
 - Narrative
 - Self assessment
- **Upload via a submission form by December 27**
 - Inform budget
 - Allow time for review

WWCC uses an integrated approach to planning at the program level and resources through our budget process with the aim of supporting the mission, vision and strategic plan in a transparent and equitable manner. Standardized Evaluation of Programs and Services (STEPS) provides a way to evaluate the contributions of all programs and services at the college to student success. STEPS informs meaningful change by identifying new priorities, and facilitating continuous improvement in alignment with the college's vision, mission, and strategic goals. All programs, departments, and budget areas of the college will submit their budget request and STEPS report, due the last Friday in December. The Budget Committee will review all requests and reports.



FY26 Planning Timeline



For full timeline, visit the Planning and Budgeting page at

<https://www.wvcc.edu/employees/integrated-planning-and-budgeting/>



WE CAN DO BETTER!

Please take our survey to provide your feedback on the budget process as you've experienced it so far.

We will ask for your feedback again this Spring, to make sure we are continuously improving.

Your responses are anonymous.

Survey closes at 4 pm on Friday, 9/20/2024

Budget Process Assessment Fall Conference, September 2024



Institutional Assessment Plan 2024-2028

The Northwest Commission on Colleges and Universities (NWCCU) Standard One for accreditation clearly defines academic and institutional assessment:

1.B – Improving Institutional Effectiveness

1.C – Student Learning

1.D – Student Achievement

The draft Institutional Assessment Plan (IAP) describes the mechanisms used to assess the College's academic programs, course offerings, student support services, and administrative operations with a strong emphasis on student success.



Draft Purpose Statement

The purpose of assessment at Walla Walla Community College (WWCC) is **to guide and empower every student toward meaningful learning in their academic and personal achievement and for the institution to assess institutional effectiveness, student learning, and achievement.**



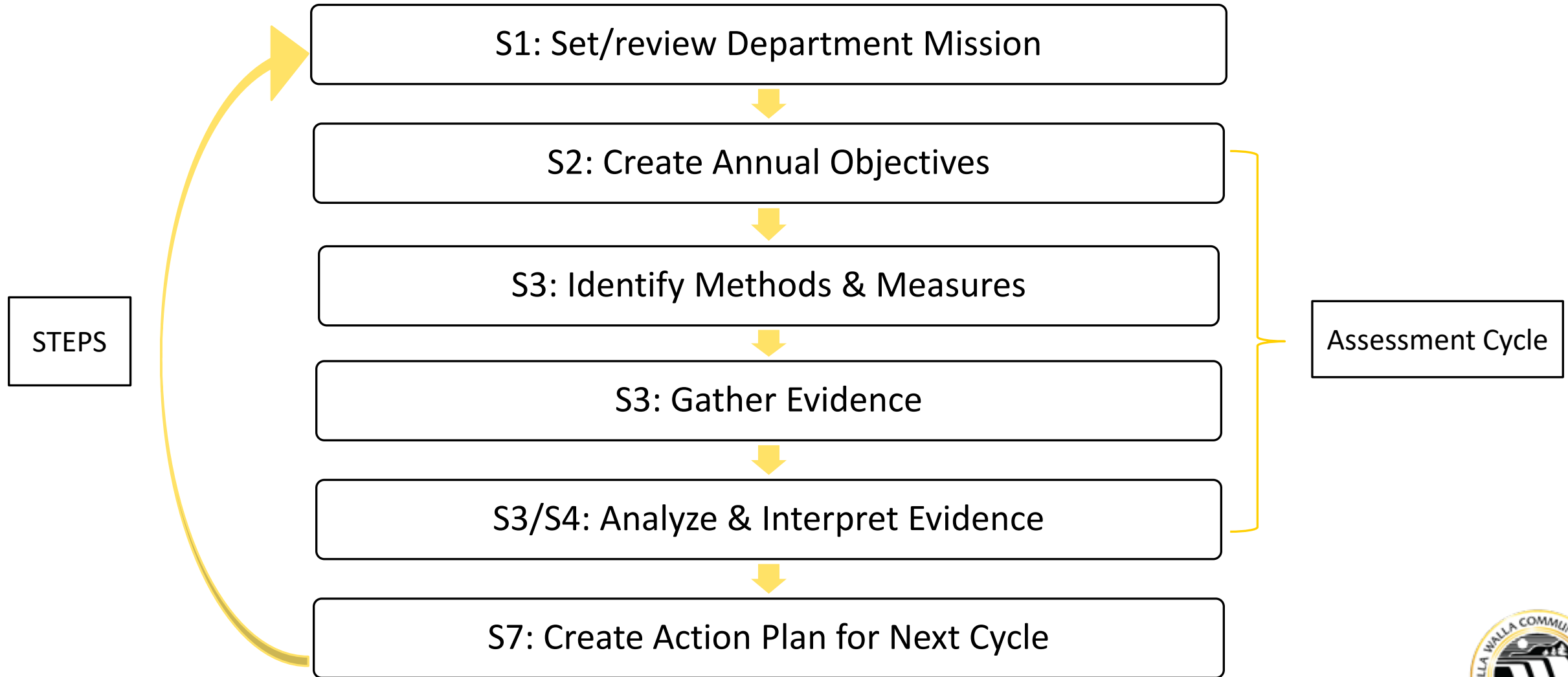
WWCC Guiding Principles for Assessment

1. All assessment efforts are founded upon the institutional mission and align with identified student learning or achievement outcomes.
2. All WWCC faculty, staff, and administrators have a role in assuring student success.
3. Effective assessment is ongoing, cyclical, and used for continuous improvement.
4. Effective assessment measures student achievement based on established performance standards.
5. Assessment results must be shared with key stakeholders and decision-makers to identify needed changes.

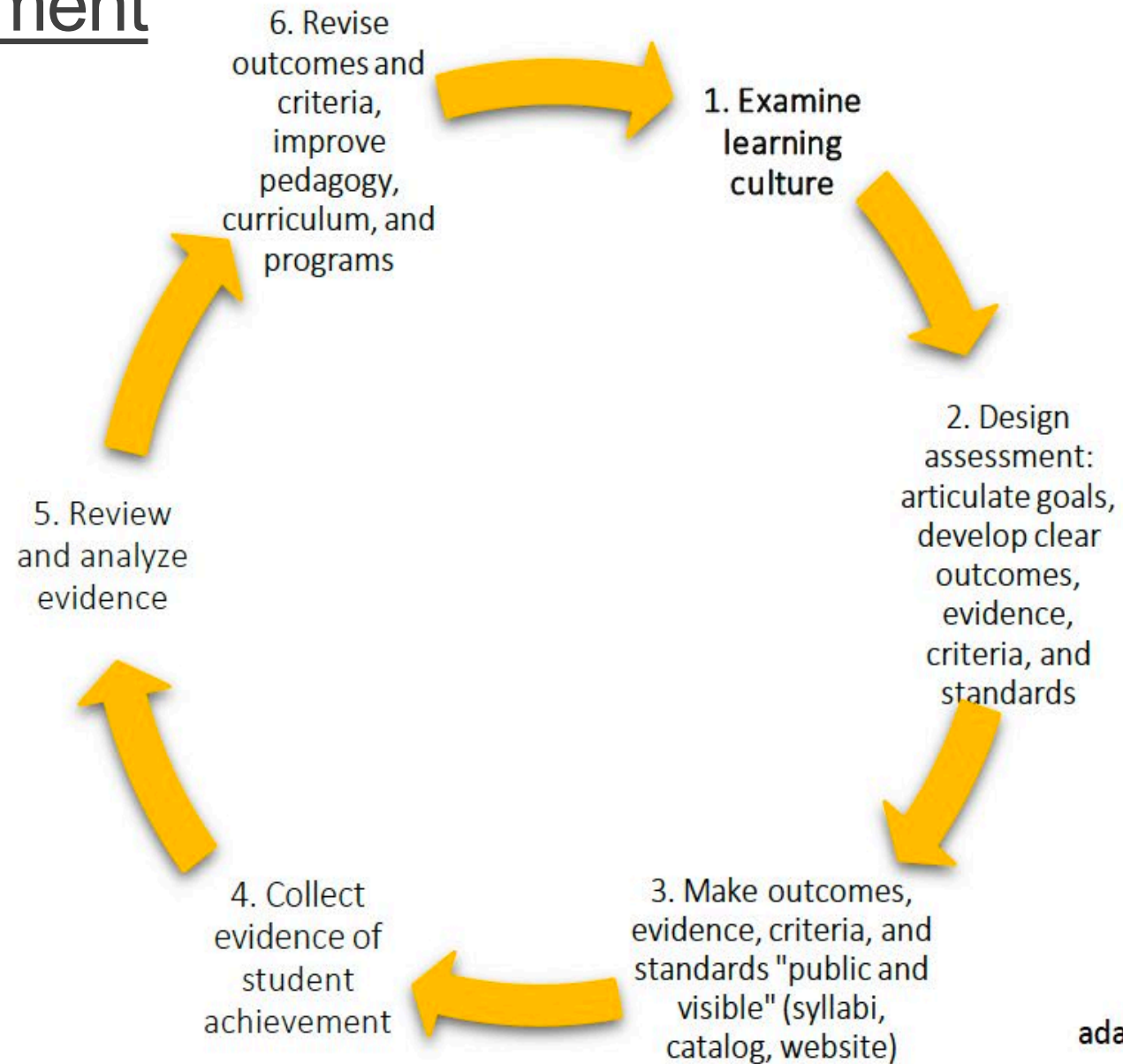


Non-Academic Assessment

Non-academic assessment is an ongoing process that begins each new year with the annual STEPS process.



Academic Assessment



adapted from Driscoll and Wood, 2007



Questions?

