

BUDGET, GOALS AND PLANS COMMITTEE

Annual Report 2007-08

- A. Chris DeLape continued as Chair. She reviewed and explained **budget jargon** with the Committee in order to prepare them for reports by administrators.
- B. **Assistant Vice President of Institutional Research Director Jackie Andrews and Financial Analyst Julie Chiarito.** Jackie and Julie presented the first report based on the new methodology established for measuring the number of part-time/full-time faculty. The methodology determined which part-time and full-time faculty would be consistently counted. Thus, each year the counts would be based on the same criteria, and comparisons would have meaning. The full report comparing Fall 2006 to Fall 2007 will be posted on the BG&P Web site, but numbers of interest are:
- a. increase of fulltime faculty from 310 to 327 (increase of 17);
 - b. decrease in part-time faculty from 346 to 325 (decrease of 21)
 - c. number of course sections taught by adjuncts in Fall 2007 is 431 out of 1259 course sections = 34% (3% decrease from 2006)
 - d. number of course sections taught by full-time faculty in Fall 2007 is 828 out of 1259 course sections = 66% (3% increase from 2006)
- C. **Assistant Vice President of Administration and Finance Michele Halstead and Peter Fairbrother of Internal Controls:** Michele presented the \$58,000,000 SUNY New Paltz budget and explained it by category (PSR, PST, OTPS). She provided a brief comparison with the 2006-07 budget figures as well. She introduced Peter Fairbrother and explained the function of Internal Controls—a process that integrates the activities, plans, attitudes, policies, systems, resources and efforts of the people of an organization working together, and that is designed to provide reasonable assurance that the organization will achieve its objectives (i.e., safeguarding assets) and mission.
- D. **Campus Facilities Planning Task Force**
The Chair was a member of the Task Force and presented a draft of the plan to the BG&P Committee for feedback.
- E. **Budget Process Survey**
Each year, the BG&P Committee conducts a survey to see how well the budget process is working. This year we met with Jackie Andrews to discuss what kind of information can be captured by surveys. We modified or completely changed several questions. The survey and results will be posted on the BG&P Committee Web site: newpaltz.edu/budgetcommittee.
- a. Survey Results:
 - i. There were 88 responses, compared with 108 in 2007 (19% decrease). The majority of the respondents were from LA&S (22) and F&PA (24). There was an approximately 10% increase in professional faculty who responded and a 10% decrease in academic faculty who responded, compared with 2007.
 - ii. We broke down “Status” into more specific categories: Full-time/Part-time Academic, Full-time/Part-time Professional. 51 full-time academic responded; plus 2 part-time academics; 27 full-time professionals responded; plus 3 part-time professionals

- iii. 67% of respondents had discussed the budget in a departmental meeting, up slightly from 2007; however only 56% were satisfied with the level of discussion.
- iv. 20% had received a copy of the budget request prior to discussing it in their departments.
- v. Clarifying questions about PSR and PST produced more definitive responses, with approximately 60% of the responses moving from N/A to Yes or No when compared with all of the previous years.
- vi. Because the number of responses was low, we cannot assume that they are representative of the faculty as a whole. However, written Suggestions and Comments from the survey provided the basis of our recommendations below.

b. Observations and Recommendations:

- i. New chairs and new faculty mention that they do not have a clear understanding of the budget or the budget process. We continue to recommend that Deans should give new chairs an orientation which includes 1) an introduction to the budget terminology, 2) the specific departmental allocation and how to monitor it, and 3) clear expectations regarding soliciting information from faculty in order to formulate a representative budget request. In turn, department chairs should explain the budget terminology to their own faculty when initiating budget discussions.
- ii. For the purpose of a more informed budget discussion, we urge chairs to present a preliminary budget in written form (email or hard copy), comparing it to a previous year's budget, as a basis for departmental discussion.
- iii. When departments have meetings in which budgets are discussed, minutes should be taken. As per the established Budget Process, deans should require that those minutes be submitted along with the department's final budget request.
- iv. Several faculty and chairs commented there really is nothing to discuss because the number of adjuncts hired is dictated by curriculum requirements and that OTPS allocations never change. In addition, the money that most faculty appear to be concerned about is travel money. We encourage departments to discuss and prioritize their actual needs because allocations are not static; in addition, there are often other funding sources which the department may not be aware of (CAS, Foundation, AER, Summer Session Revenue Sharing, IFR accounts, SCAP, Professional Development money, Field Trip money, etc.). Thus, departments should continue to make their optimum needs known each year and to transmit those needs to the chair and to the dean as part of their budget request.
- v. The Budget Process is posted on the BG&P Committee Web site (newpaltz.edu/budgetcommittee). It is listed in calendar year form, with deadlines articulated. In addition, there is a helpful list of "budget jargon," which explains the most commonly used budget terminology on campus. We encourage faculty to visit the Web site to avail themselves of this useful information.

- vi. The Chair of BG&P would be willing to offer a brief budget tutorial as part of a faculty meeting or in a separate meeting designated for that purpose.
- vii. Regarding the Budget Information Survey itself, the BG&P Committee will be discussing whether the survey captures useful information, and whether to continue with the survey on an annual basis, or cut back to every other year.

Respectfully submitted:

Budget, Goals and Plans Committee:

Christine DeLape, Chair, Fine & Performing Arts

Jan Hammond, Education

Yoav Kaddar, Theatre Arts

Rudolf Kossmann, English

Pierre Lacour, Economics

Terry Murray, Educational Studies

Corinne Nyquist, Library

Carol Rietsma, Biology

Tulin Sener, Business

Ping Su, Business

Suzanne Stokes, Art

Helise Winters, Regional Education

Katja Izzard, Aracelis Jones, Student Representatives