



# **MERRITT COLLEGE**

## **Budget Committee Retreat**

**June 2, 2015**  
**9:00am-4:00pm**  
**The Waterfront Hotel**

### **AGENDA**

- I. Review of Goals of Retreat/Agenda**
- II. Introductions/Icebreaker**
- III. Assessment of the 2014-2015 Budget Process (Good & Bad)**
  - A. Review of Budget 2014-2015 Budget Timeline**
  - B. Review Process for Fund 1 Allocations & Other Allocations at the March Budget Meeting (including Deans meeting with us, incorporation of APU's, Program Reviews, Assessment/SLO data etc.)**
  - C. Review Process for Other Funds – categorical and non-categorical that we did not review/cover**
  - D. How Does our Budgeting Process Tie to Planning/CEMPC**
- IV. Comparison of Merritt College to Other Colleges – Including Video Interviews and Information re Other College Processes**
- V. Accreditation Update/Feedback – Review of Comments from Accreditation Team and Determine How to Adjust**

- VI. Goal Setting for Total Complete Budgeting of All Funds – How Do We Accomplish Total Complete Budgeting?**
  - A. For all funds, not just Fund 1**
  - B. How to Incorporate APU’s, Program Reviews**
  - C. How to Incorporate Assessment Data**
    - **Can it be from the information in the APU’s/Program Reviews – does it have to come from Taskstream?**
    - **And what is “assessment” for purposes of what we are doing – assessment also includes determining how you spent funds**
  - D. How to Integrate Budgeting and Planning Processes**
- VII. Develop Budget Process Timeline/Calendar for 2015-2016**
- VIII. Future Development of Written Budget Manual/Process for Documenting Budgeting Process**
- IX. Determine Next Year’s Goals for 2015-2016**