Principles, Criteria and Data Elements for Unit Planning

These budget principles, criteria and data elements are used regularly by units to inform planning and budgeting at the unit level. In addition, they are used by committees allocating sources such as student tech fee and Perkins Grants. In the event of budget or program reductions these elements will inform those decisions.

Budget planning at Lane will be guided by the following principles:
1. Budget planning will be guided by the college strategic plan, unit plans, council plans and other planning efforts.
2. Budgets will focus on furthering the college mission.
3. Budgets must meet legal, contractual and accreditation obligations.
4. Budgets must meet board policies and involve as much input from the college community as possible
5. Maximize revenue generation balanced with accessibility and affordability.
6. Invest in new activities that maximize future revenue.
7. Support student enrollment, retention, success and learning while minimizing negative impact of budget constraints on quality of student services, instruction and college infrastructure.
8. Maximize investment in technology or streamlined work processes that will save resources.
9. Maintain ability to respond to community needs.
10. Avoid involuntary layoffs of permanent employees
11. Maintain existing facilities and equipment well and upgrade as needed.
12. Benchmark to best practices while recognizing intentional variations between Lane and national norms.
13. Using data and objective criteria in planning and resource allocation.

INSTRUCTIONAL PROGRAMS

Criteria	Data Element
Enrollment – demand	5-year Enrollment History; future trends
Program – Discipline cost	Cost per FTE; revenue; comparisons with selected Oregon colleges
Retention	Student Persistence at the institutional level; course completion
Capacity – Utilization	Capacity Analysis – class fill rate; student: faculty FTE
Essential courses required for degree/certificate	Student enrollment in required courses
Availability of jobs (for CT programs)	Employment Department data
Wages (for CT programs)	Employment Department data
Job Placement (for CT programs)	Employment Department data

STUDENT SERVICES

Criteria	Data Element
Enhances Student Engagement	Number of service contracts Number of unduplicated participants Demographics of individuals served Other evidence of enhancing engagement
Enhances Student Learning	Enhanced student persistence Enhances one of five benchmarks from the Community College Survey of Student Engagement (Active & Collaborative Learning, Student Effort, Faculty/Staff and Student Interactions, Academic Challenge, Support for Learners) Other evidence of enhancing learning
Enhances Student Satisfaction	ACT Satisfaction data CCSSE satisfaction data Other evidence of enhancing satisfaction

STUDENT SERVICES (continued)

Criteria	Data Element
Requirement for Service	Essential to completing a business process with students
	Essential to an effective educational experience
	Legally mandated
Uses resources efficiently	Comparison of faculty/staff to student ratios to national association standards and best practices.Develop appropriate institutional benchmarks
	Demand/capacity analysis (i.e., waitlists, complaints about access, etc.)
	Total general fund budget
	Budget from other sources (i.e., student fees, grants, etc.)
	Other evidence of efficient use of resources
Note: Because Student Services are so diverse, it is difficult or impossible to use a standard set of data elements for every service	

College Services

Criteria	Data Element
Service is essential to operation of the institution	Consequences of not having service
	Citation(s) for legal requirements (e.g. governing ORS, federal code, IRS and audit requirements)
Cost of service	Total General Fund support for service (offset by service charges)
	Service charges and other revenue that offset GF support
	Revenue directly provided to GF by service
Service is cost effective	Comparison to industry standards (e.g. housekeeping sq. ft./staff FTE, # of desktops/IT technician). Develop appropriate institutional benchmarks
	Cost comparisons with similar outside services
	Cost savings for college compared to cost of service
Service is utilized	Customer counts
	Service logs
	Number of transactions