



# Welcome to the Student Services Planning & Budget Team (SSPBT)

## The Orientation Packet Includes:

- **About Student Services Planning & Budget Team**
  - **Meeting Time & Place**
  - **Effective Committee Member Checklist**
  - **Role of Classified Staff in Governance**
  - **Student Role in Governance**
  - **Membership List**
  - **Glossary**
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## About Student Services Planning & Budget Team

### Mission

As part of the college's governance structure, the SSPBT provides leadership and coordination for the development and implementation of Student Services planning and budget processes that support institutional strategic goals and priorities and the college's Educational Master Plan, Facilities Master Plan, and the Technology Master Plan.

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### Charge

- Facilitate the effective, efficient and timely Student Services program review, annual planning, and budgeting processes.
  - Develop a comprehensive annual plan for Student Services with clear goals, outcomes, budget projections, and a year-end review and evaluation process.
  - Develop a process for establishing, implementing and communicating the funding priorities and resource allocation consistent with the Student Services, institutional strategic planning goals, and the college's Educational Master Plan, Facilities Master Plan, and the Technology Master Plan.
  - Coordinate with the Institutional Research Office to provide quantitative and qualitative data related to Student Services Programs.
  - Establish and implement consistent decision-making criteria and evaluation priorities in matters concerning Student Services budget and resources.
  - Facilitate collaboration of planning and budget discussions and decisions across other shared governance groups and Planning and Budget Teams.
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### Committee Structure:

#### Co-chairs\*

- Vice President of Student Services
- Committee elected person from within the committee

#### Membership

- Administrators (5)
  - Faculty (3), with one from outside of Student Services
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- Classified (3), with one from outside of Student Services
  - Student (2)
  - Bargaining Unit (2-3)

Confirmed/appointed by respective governance group

### **Membership (staggered) terms**

- Two-year terms for all De Anza Employees
  - Term of DASG Students or Designees
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### **Decision making process**

- Voting Majority
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### **Committee training offered**

- Orientation by the SSPBT Chair
  - Packet posted online
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### **Meeting schedule**

- First and third Thursday of each month from 1:30-3:00 p.m., or as needed.

### **\* Co-chairs are responsible for:**

- Facilitating meetings;
  - Developing the agenda (based on previous committee discussions and goals);
  - Ensuring that the committee accomplishes its' goals.
  - Making certain that minutes are posted to the SSPBT web page;
  - Attending meetings; and
  - Making presentations to College Council, Academic & Classified Senates, and other governance groups when needed.
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## Calendar

### Meeting Time & Place

**Frequency:** First & third Thursday of the Month - unless otherwise noted

**Time:** 1:30 - 3:00 p.m.

**Place:** DA/Library LC237 El Milagro Room - unless otherwise noted

Note - The Student Services Planning and Budget Team meets during fall, winter and spring quarters but does not usually meet during the summer or first or last week of each quarter.

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# Effective Committee Member Checklist

Do you...

- know the purpose of the committee?
- know the goals of the committee?
- know the committee composition?
- know the committee's procedures and ground rules?
- know the decision making process of the committee?
- know when the committee meets & have the calendar of meetings for the term or academic year?
- honor confidentiality within the committee and of your constituents, as appropriate?

Are you organized? Do you have all of the following?

- Have a binder or folder – dedicated to the work of this committee?
- Meeting agendas, notices and other materials sent to you with dates and in chronological order?
- Your notes from previous meetings
- Copies of notes that you've sent to your constituency after every committee meeting
- Reference materials

Closing the Loop

- Do you have all the e-mails and phone numbers of everyone in your constituency?
- Have you created a voice mail list of everyone in the group you represent?
- Have you created an e-mail list of everyone in your constituency?
- Have you blocked off time after every committee meeting that is dedicated to getting the committee notes BACK out to your group?
  
- Do you have a method to connect with your constituency so you can poll members if needed? (via phone or e-mail?)

As a committee member you have committed to...

- Attend every meeting
- Arrive on time or early
- Stay until the end of the meeting
- Listen with respect to all speakers
- Question positions, not people
- Represent your constituency
- Make clear if you are speaking for yourself or for a minority
- Ask Questions, & be concise & on-topic in your comments
- Not be silent if you disagree – voice your concerns
- Pay attention to group dynamics & how they work on a committee as well as what you add both personally and professionally to the group dynamic.

Role of a committee chair...

- Mentor new people
- Create and distribute a binder or folder with all pertinent material
- Set the agenda and keep track of where items are in the process re: information, discussion or action items
- Create a safe environment so all feel comfortable in voicing their concerns
- Know the basic tenets of running an effective meeting (timelines, agendas, facilitation)

## **Role of Classified Staff in Governance**

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The Board of Trustees shall ensure that all classified staff be given the opportunity to participate in district and college governance as outlined in Title 5, section 51023.5.

Before the Board of Trustees takes action on matters significantly affecting classified staff, except in unforeseeable, emergency situations, the classified staff shall have input on formulation and development of those matters.

To provide opportunity to influence the deliberative process and encourage improved policies and recommendations, classified staff representatives to the various district and college governance bodies shall be granted the same rights and privileges provided to all other representatives.

The district and colleges shall provide appropriate means (e.g., training and/or orientations) to strengthen classified staff knowledge and understanding of governance issues.

Appointment of classified staff representatives to serve on district and college task forces, committees, or other governance groups shall be made by the Classified Senates and the classified collective bargaining units. Representatives will be fully accountable to their appointing organization.

Classified staff representatives are expected to work within the established guidelines of the participatory governance process.

Approved 7/19/99

## **Student Role in Governance**

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The Board recognizes that students should have an opportunity to participate in matters of governance and access to governance mechanisms that allow them to express their opinions at both the campus and district level in accordance with Title V Section 51023.7.

To foster participation in governance, students shall be accorded membership on district and college governance committees, and (when appropriate) task forces, and similar groups.

To influence the deliberative process student members of the various district and college governance bodies, other than the district governing board, shall be granted the same rights and privileges generally held by other members

Opportunity for student participation in governance shall be maximized through reasonable accommodation of time and resources. To facilitate student attendance, the prior commitments of all members of any given committee shall receive equal consideration in scheduling meetings.

The district and colleges shall provide appropriate means (i. e., in-service training and/or orientations as needed) to strengthen student knowledge and understanding of governance issues in order to increase student preparedness, to foster greater self-confidence in student leadership roles, and to enhance student credibility.

Student representatives who serve on district or college committees, task forces, or other governance bodies shall be recommended, or where appropriate, appointed by the associated student organizations in accordance with their Constitutions and By Laws.

Students have direct access to the board in the hearing section of every board meeting, during discussions of agenda items, and, in addition, shall make use of the Student Trustee's role in the governance process.

Students shall maintain the scholastic standards of the college while serving in governance capacities.

Student representatives are expected to work within the established guidelines of the shared governance process.

Title V California Code §51023.7

Approved 2/8/93

## Frequently Used Budget Terms

- 1320 - Part Time Faculty
  - A Budgets
  - Automatic Budget Reallocation (ABR)
  - B Budgets
  - Bond Money
  - Educational Trust Fund
  - Budget Transfers
  - Campus Center Use Fee - Fund 28
  - Bond (Capital Projects) - Fund 76
  - Categorical - Fund 21
  - Census
  - Child Development - Fund 26
  - De Anza Associated Student Body (DASB) - Fund 148
  - Deficit Factor
  - Enterprise - Fund 148
  - Expenses Transfers
  - Financial Aid - Fund 37, 38, 39
  - Float
  - Full Time Equivalent Faculty (FTEF)
  - Full Time Equivalent Student (FTES) Computation
  - Full Time Faculty Obligation (FTFO)
  - General Fund - Fund 14
  - Load & Productivity
  - Parking - Fund 25
  - Productivity
  - Professional Development Leaves (PDL) Backfill
  - Revenue & Cap
  - Self-Sustaining - Fund 15
  - Special Education - Now DSPE - Fund 22
  - Work Study - Fund 23
  - WSCH Definition
  - WSCH Computation
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## 1320 - Part Time Faculty Costs

The 1320 acronym simply reflects the account object code used to pay part time faculty. So whenever you hear 1320, just substitute part time faculty teaching costs and it will be the same designation. The importance of the 1320 budget is that the scheduling and enrollment management changes each quarter are managed by adjusting the part time faculty assignments in the numerous academic departments to respond to student demand for classes. As demand increases more part time faculty are hired to teach the classes, conversely, when demand softens fewer part time faculty are hired to teach in that academic department.

## A Budgets

This is the cost of the full-time contracted salaries and benefits, and certain other items such as leases, utilities, etc.

## Automatic Budget Reallocation (ABR)

This is an acronym for 'automatic budget reallocation'. The theory is that you can budget in a broad category like a 4000 ABR and when money is spent from a specific object code i.e. 4010, it will first deduct from that code. If there is no money available in 4010 it will pull money automatically from the 4000 ABR pool. The financial reports show a negative budget amount if the ABR does not have enough money. ABR's are used for all major budget categories such as 1100, 2000, 4000, etc.

## B Budgets

This represents discretionary funding for the college. It is used for supplies, casual hourly and all other operating expenses such as repairs, postage, etc., that are the college's obligation. It is distinguished from 'A budgets' which represent the contracted salaries of faculty and classified staff and other agreed upon expenses such as facilities rental, utilities, negotiated release time, etc. The amount of the 'B budget' is set through an historic formula that allocates money to the campus. This amount is then augmented by the income that the campus generates. This campus' generated income includes instructional materials, parking fines, sale of catalogues and schedules, registration enrollment fees, transcript fees and a host of other minor fees/revenues. We have used another term for the capital outlay budgets, the 'C budgets, but the 'C budget' has become the same as the 'B budget' in fund 14 since there is no separate allocation for fund 14 capital budgets. Other parts of the capital budget get a little confusing because the state allocates restricted money to the district for 'instructional equipment' and 'scheduled maintenance'. The amount of money varies year to year as determined by the state budget process. These instructional equipment funds and scheduled maintenance funds are recorded and spent in fund 21 and fund 76 respectively, because they are restricted by the state for specific purposes.

## Bond Money

Oftentimes employees ask why we cannot use [Measure C](#) and E (bond) money to solve budget shortfalls. The bond money is restricted by law to only be used for capital outlay projects and the incidental costs of professionals devoted to the implementation of those capital outlay projects. These projects are paid for by bonds, which are sold by the district to raise money for designated capital projects and paid back by the taxpayers of our district over a (roughly) 30 year time period. Consequently, these dollars cannot be used to pay any operating expenses. The [Citizens Bond Oversight Committee](#) meets on a regular basis to ensure that all expenditures for bond projects meet the legal state and local requirements for expenditures of these bond monies.

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## **Deficit Factor**

The percentage by which an expected allocation of funds to a school district or county office of education is reduced. The state may apply deficit factors to revenue limits and categorical programs when the appropriation is insufficient based on the funding formulas specified by law.

## **Educational Trust Fund**

A District fund established which rewards the college's productivity.

## **Budget Transfers**

Are for transferring money from one account to another. The appropriate budgeter must sign off on it. You cannot transfer from 'A' budget to 'B' budget or between funds (i.e. categorical project to the general fund 14).

## **Campus Center Use Fee Fund 28**

Revenue for this fund is generated by a mandatory fee for use of the campus center. The proceeds are used for payment of the bonds and COPS, which financed the construction of the building.

## **Capital Projects Fund 76**

This fund is used for state money directed toward major building projects, instructional equipment allocations, and state scheduled maintenance projects.

## **Categorical Fund 21**

This fund handles all the local, state, and federal grants that are received by the college. Large grant programs would include Matriculation, NASA, EOPS, VTEA, health services, and many other smaller programs.

## **Census**

Students are counted about the third week of the quarter. This is known as 'census week'. Full-Time Equivalent Student (FTES) is defined as 12 hours/week = 525 weekly student contact hours (WSCH).

## **Child Development Fund 26**

This fund is established for the operation of the Child Development Center. The revenue comes from parent fees, as well as Local, State and Federal grants.

## **De Anza Associated Student Body (DASB) Fund 148**

This fund records all the student body revenue from card sales, fund-raisers and flea markets, the revenues are used for the operations of the DASB, the clubs, and support of the college.

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## **Enterprise Fund 148**

This fund is established for the Bookstore, Food Services and maintenance of the Campus Center Building. It is designed to be self-sufficient so that revenues from the operations cover the costs of sales, labor and maintenance.

## **Expenses Transfers**

This is used to transfer the expense for a specific transaction from one account to another. Specific detail of the expense must accompany the transfer. The budgeter of the account where the expense will be charged must sign the transfer.

## **Financial Aid Fund 37, 38, 39**

These funds are used for federal and state financial aid programs, such as Pell Grants, SEOG, Perkins, etc.

## **Float**

When a regular full-time employee resigns or retires from a position, the dollars freed up while the position is vacant are called float dollars. The district has an automatic procedure in place where those dollars are moved from the budget account to a campus-wide salary lapse account as 'B' budget.

Classified float is the equivalent of the actual rate the incumbent was being paid at the time he or she left the position. These float dollars can normally be used to hire casual hourly replacements while the position is vacant.

Certificated non-teaching positions also generate float in the same manner. In these cases, float dollars are converted into hourly teaching dollars until the position is refilled). Float can also be used for other discretionary purposes within the college besides salary backfilling.

## **Full Time Equivalent Faculty (FTEF)**

Full Time Equivalent Faculty, a load of 100% (range of 95% to 105%) taught by one instructor (full-time) or several instructors (part-time).

## **Full Time Equivalent Student (FTES) Computation**

In a quarter environment, during census week, to compute FTES, you would do the following calculation:

1. There are 175 days of instruction in an academic year (The state defines this). This results in 35 weeks of instruction in an academic year (excluding summer quarter).  $175/5$  days per week = 35 weeks per year. There are 11.67 weeks in a quarter (35 weeks per year / 3 quarters)
2. Multiply the number of hours a class meets per week (WSCH) for that quarter by 11.67 to project for the year.
3. Divide this by 525 to obtain the FTES.

## **Full Time Faculty Obligation (FTFO)**

There is a state regulation that requires community college districts to hire a minimum number of full time (FT) faculty each year. The district's FTFO is currently 516.

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## General Fund - Fund 14

This is the general operating fund of the district. Basically everything happens here unless the State designates a fund to be set up for a special purpose. This is the fund that receives the state apportionment and property taxes for income and pays most of the expenses of the teaching and support staff in addition to all the operating expenses like the 'B' budget and utilities etc.

### Load

The class 'productivity' would be calculated as follows:

1. Assume that an Accounting 1A load factor equals .0830 for 1 quarter or .25 for the year (three quarters). (That is, the instructor would have to teach 4 of these classes per quarter, for three quarters to make up his or her full load for the year.)
2. If there were 140 hours of enrollment for that class for that quarter, / by .25 (quarter load factor of .0830 x 3 quarters) load factor for that class, the productivity = 560 WSCH/FTEF

The financial impact on the district for changes in WSCH/FTE is enormous. For example, if the WSCH/FTE drops by 10 points from 530 to 520, the district revenue would be reduced by \$600,000.

## Parking - Fund 25

This fund is established to receive revenue from the sale of parking decals and permits. The fees are then used to make payments on the loan that was used to build the parking garage at De Anza, for the parking security officers and for other parking lot maintenance costs.

### Productivity

The efficiency with which we use our resources. It is figured by dividing the quarterly WSCH by the quarterly FTEF. Because FTEF is also an annualized term, productivity can also be figured by dividing the WSCH by 3 times the Load Factor. District budgets for a productivity of 530.

## Professional Development Leaves (PDL) Backfill

We also receive funds to backfill Professional Development Leaves (PDL) granted to certificated staff, and Staff Development Leaves (SDL) granted to classified staff. In these cases, the calculation on PDL and SDL backfill is slightly different than float.

Classified SDL backfill is calculated at the part-time hourly rate equivalent to step A of the salary range of the incumbent. This amount of money would be enough to hire casual hourly replacements.

Certificated non-teaching and teaching PDL backfill is calculated at the part-time hourly rate (about 70% of the full-time rate).

## Revenue & Cap

The base revenue we receive from the state is based on the FTES we generate. Generally, the more FTES we generate the more money we receive from the state. However, the state limits the growth in community colleges by a variety of formulas. In our case, we are generally limited to (capped at) a 1% growth rate. We are at cap now, so any funding for

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growth above the 1% allocated growth cannot be guaranteed from year to year. It is through this method that we receive over 85% of our annual revenue each year (over \$93 million dollars district-wide).

## **Self Support - Fund 15**

This is technically a sub fund of the general fund, but programs are set up here to be self-sustaining. That is, they generally have a source of revenue like the Community Development Program and are expected to pay for all their own expenses. The reprographics department is another example of a self-sustaining department that relies primarily on chargebacks from the college to operate.

## **Special Education (Now DSPS) - Fund 22**

This fund is set up for the special education programs of the college. It receives restricted income from the state for the programs as well as general apportionment funding generated by special education students in regular classes.

## **Work Study Fund 23**

This fund is used to channel federal financial aid dollars to qualified students on financial aid.

## **WSCH Definition**

WSCH is an acronym for weekly student contact hours. These types of calculations on an individual class roll up to the college wide totals, where we convert to FTES and report to the state. We are paid on the basis of FTES by the state, so you will hear many references to 'WSCH producing classes', because it drives so much of our district income.

## **WSCH Computation**

For an Accounting 1A class that meets 4 hours per week (4 unit class), and there are 35 enrollees at census date, the FTES would be computed as follows:

1. 35 enrollees multiplied by 4 hours per week = 140 hours of enrollment in the census week, which computes to 140 WSCH.