

# WORKSHOP: 2024-2025 PLANNING & RESOURCE ALLOCATION PROCESS



Presenters:

Planning Committee Co-Chairs Amanda Badgett & Dr. Robyn Wornall

Budget Committee Co-Chairs Ricardo Guzman & Jim Reeves

- December 6, 2023 (in person)
- December 8, 2023 (via Zoom)

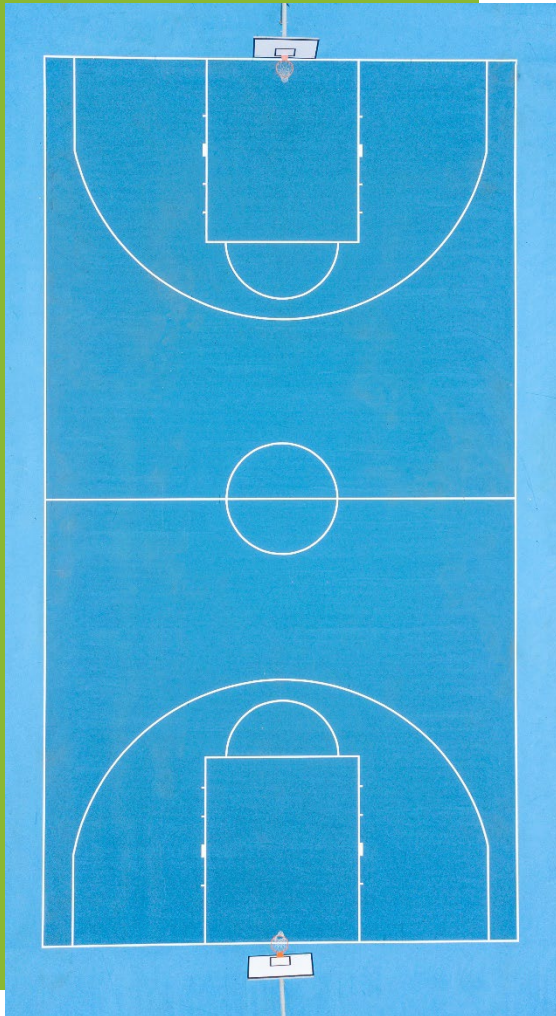
# OUTLINE FOR TODAY'S WORKSHOP



1. Defining our terms: Strategic Initiatives and Operational Continuance
2. Context: Overview of 2024-2025 Planning and Resource Allocation Process
3. Context: Planning Priorities for 2024-2025 Cycle

*Continued...*

# OUTLINE FOR TODAY'S WORKSHOP (CONTINUED)



4. Context: Prioritization Rubric
5. Examples of Strategic Initiatives
6. The Annual Template

All materials associated with 2024-2025 cycle posted here:

<https://www.napavalley.edu/about/administrative-services/planning-and-budget-development.html>

# STRATEGIC INITIATIVES **VS.** OPERATIONAL CONTINUANCE



## Strategic Initiatives:

- NEW IDEA
- Linked directly to Institutional Planning Priorities

## Operational Continuance:

- IN ORDER TO MAINTAIN THE CURRENT LEVEL OF SERVICES
- Requires documented support (in the form of vendor quotes or 3-year average cost increases).



# SUBMISSION PATH FOR STRATEGIC INITIATIVES

Collaborative conversations among faculty, staff, administrators (including deans and VPs among the “units” involved in the initiative)



One person submits Strategic Initiative (on behalf of a collaborative group) to RPIE\* by January 31, 2024


- \*Submissions cc'd to:
- All “units” involved in initiative
  - All associated Deans & VPs



RPIE compiles Strategic Initiatives for Planning Committee to prioritize

# SUBMISSION PATH FOR OPERATIONAL CONTINUANCE

Budget Center  
Managers and Program  
Coordinators identify  
Operational  
Continuance needs



All Budget Center  
Managers and  
Program Coordinators  
submit Operational  
Continuance needs  
to B&F\*  
by January 31, 2024

\*Submissions cc'd to:

- Dean over the program
  - Associated VP/P
- 

B&F compiles  
Operational  
Continuance needs for  
Budget Committee to  
consider

Deans review  
submissions from their  
respective areas;  
coordinate  
with B&F regarding  
needs that can be  
absorbed by local  
budgets



# Context: Flowchart

**November 9 –  
January 31  
(Plans due by  
Jan. 31)**

Units/Programs/Services:

- Collaborate with others to develop Strategic Initiatives aligned with established institutional planning priorities
- Identify unit-level operational continuance resource needs
- Discuss plans and resource needs with colleagues, including area VP/President
- Enter Strategic Initiatives, associated resource requests, and Operational Continuance needs into annual template
- Submit completed templates to Business & Finance & RPIE

**Workshops: Dec. 6 & 8**

**November –  
December**

Planning & Budget Committees provide context for annual planning and resource allocation process.

- Planning Committee: reviews and updates Prioritization Rubric
- Budget Committee: updates Guidance Memorandum

**Plans due January 31**

<https://www.napavalley.edu/about/administrative-services/documents/2024-25-PlanningResourceFlowchart.pdf>

## CONTEXT: INSTITUTIONAL PLANNING PRIORITIES



**Student Performance:** Equity-minded initiatives that lead to measurable improvements in student matriculation, on-boarding, access, success, persistence, and overall sense of belonging. Initiatives focusing on specific metrics and objectives described in institutional and program-level planning documents (e.g., Guided Pathways, Student Equity, Strategic Enrollment Management, program review).

**Student Basic Needs:** Investments that improve student access to housing, food, health/mental health services, and transportation. Initiatives with a focus on expanding resources for students and development of community partnerships.

**Campus Climate:** Initiatives that promote and facilitate a safe and inclusive work environment for all employees. Initiatives designed to address findings from recent campus climate surveys and other data.

**Physical Infrastructure:** Investments in the college's aging physical infrastructure, including instructional equipment. Initiatives with a focus on improving and modernizing existing facilities and equipment supporting student learning (including safety and access).

**River Trail Village:** Investments in marketing, onboarding, and support services for students in residence. Initiatives with a focus on providing opportunities and services for campus residents, including new and innovative offerings.





# CONTEXT: PRIORITIZATION RUBRIC

Criteria	Criteria Considerations	Assessed via Template Column(s)
<b>Strategic Impact</b>	Alignment between proposed initiative and institutional planning priorities for 2024-2025	A & B
<b>Collaboration</b>	Number of programs, services, or/and units actively engaged in implementing the proposed initiative	C
<b>Promotion of Institutional Goals</b>	Alignment between proposed initiative and guiding institutional plan(s)	D & E (with B)
<b>Promotion of Program-Level Goals (Plans)</b>	Alignment between proposed initiative and existing program-level plan(s) (i.e., documented in program-level plan(s))	F & G (with B)
<b>Impact of Initiative</b>	Measurable outcomes/impacts of the proposed initiative (e.g., number of students impacted, anticipated improvements in performance, deliverables), including rationale and method of evaluation	H – J (with B)
<b>Timeliness</b>	Alignment between proposed initiative and status of NVC in 2024-2025, including timing, urgency, what can be accomplished within one year	B – J
<b>Completion of Submission</b>	All portions of template filled out, reflects a clear plan, including assessment of sequencing, costs associated with all resources needed	A – N



# EXAMPLES & 2024-2025 TEMPLATE

- Three Examples: [Strategic-Init-Sample-Dec-23.xlsx \(live.com\)](#)
- Introducing the Template: [Strat-Initiatives-Worksheet-FY25.xlsx \(live.com\)](#)
- Planning and Budget Development Website: [Planning & Budget Development \(napavalley.edu\)](#)
- Questions?