ATTACHMENT 5

ANNUAL BUDGET (Org) REVIEW FORM

Budget Org Name_____   **Budget Org code** _____

Name of Budget Manager _____

This form has two purposes; the first use is for annual assessment and institutional effectiveness processes, and the second, to serve as a supplement to division discussions for the budget prioritization process. After your division meets to prioritize anticipated new costs, your Vice President/Dean/President will inform you to complete the Budget Request Form for those approved Anticipated New Costs being considered for inclusion in next year's budget. Budget Request Forms will then be submitted to Cabinet and the Planning Council for further review and prioritization.

Please complete the form and review it with your VP/Dean. Forward a signed copy to Sue Fagan and the original Kristy Lisle due February 8, 2012. Please feel free to add rows to the sections as needed by hitting the tab key.

1. **2011-2012 Annual Continuous Improvement/Assessment Progress**: If you represent an academic area please complete A, if you represent a business or student support area, please complete B.

   A. **Academic Org** – based on the <mark>most recent Program Review</mark>, please provide detailed information on the progress of each improvement actions/initiatives (e.g., the action is complete, how was completion accomplished, we are working on the action, what advances were made, we have not made progress, what assistance can we provide (data, budget, general assistance), what are the plans for the upcoming year to make progress)

   B. **Business or Student Support Org** – based on your most recent mid-term review please provide detailed information on the progress of each *institutional* strategic planning indicator (e.g., complete, in progress (60%), not yet started)

   Business or Student Support Org – based on your most recent mid-term review please provide detailed information on the progress of each *division* strategic planning indicator (e.g., additional accomplishments/actions/projects from your mid-term performance review, division, or other) (e.g., complete, in progress (60%), not yet started)

   C. **For the current budget cycle 2011-2012, do you have any anticipated Cost/Budget SAVINGS for your Org?**

Explanation/Comments	Account Code	Anticipated Savings
		$
		$

   D. **For the current budget cycle 2011-2012, do you have any anticipated Cost/Budget unmet NEEDS for your Org?**

Explanation/Comments	Account Code	Anticipated Needs
		$
		$

2. **2012-2013 Strategic Planning** – if you represent an academic area please complete A, if you represent a business or student support area please complete B. For your reference, the **Institutional Annual Plan Projects** are as follows: 1. Implement Strategies to meet College Completion Agenda Goals; 2. Continue to develop and implement an infrastructure to expand Four Year Degrees; 3. Continue to develop and manage the Service Excellence Program.

   A. **Academic Org** – based on the most recent 3-Year Program Review, please provide information on the improvement actions/initiatives you will focus on next year.

B. **Business or Student Support Org** – please indicate the division projects that are a part of next year's planning.

3. **2012-2013 Anticipated Budget Needs** - for next year's budget cycle 2012-2013 please indicate the Org's anticipated needs in questions A through D. E is to summarize all requests.

   A. Facilities – if current facilities are not adequate, list the needs and general location (e.g., additional office space, furniture, new carpet, painting and etc.).

Project/Needs Budget Request	Request (select one for each row)		Expected Benefits	Connected to Div. Project #	Connected to Inst. Project #
	Estimated New Cost to Continue	Estimated New Expansion Request			
	$	$			
	$	$			

   B. Technology –If you represent an academic area, please complete A, if you represent a business or student support area, please complete B.

   a. List any classroom related hardware and software instructional technology needed in your Org area for the next fiscal year. (e.g., Student Response System, Audio-Video systems, PC's, software, etc.)

Project/Needs Budget Request	Request (select one for each row)		Expected Benefits	Connected to Div. Project #	Connected to Inst. Project #
	Estimated New Cost to Continue	Estimated New Expansion Request			
	$	$			
	$	$			

   b. List any hardware or software needed in your Org area for the next fiscal year (e.g., Student Response System, Audio-Video systems, PC's, software, etc.)

Project/Needs Budget Request	Request (select one for each row)		Expected Benefits	Connected to Div. Project #	Connected to Inst. Project #
	Estimated New Cost to Continue	Estimated New Expansion Request			
	$	$			
	$	$			

   C. Staff and Program Development (SPD) Requests: please list anticipated SPD (e.g., presentations, travel & fees)

Name	Brief Description of the request (e.g. AERA conference)	Anticipated Date	Estimated Cost
			$
			$

   D. Student Helpers: do you anticipate the need for student help? (e.g., scholarship, student assistant, work study)

Desired Hours	Describe Need/Expected Benefit

   E. Summary of Anticipated New Costs other than Facilities &/or Technology, for the 2012-2013 Budget Cycle:

Project/Needs Budget Request	Request (select one for each row)		Expected Benefits	Connected to Div Project #	Connected to Inst. Project #
	Estimated New Cost to Continue	Estimated New Expansion Request			
	$	$			
	$	$			
	$	$			
	$	$			

Completed by (Print): _____   Date: _____

VP's Signature: _____   Date: _____