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Planning Team	Budget and Planning Group
Meeting Date	June 8, 2017 – from 9:00 a.m. to 12:30 p.m.
Members Present	Regina Ferrante, Director of Finance Manchester CC Jill McDowell, Director of Finance Gateway CC Melentina Pusztay, Director of Budget & Planning SO Jared Ragusett, Ph.D., Assistant Professor of Economics CCSU

Meeting Notes

The group reviewed all listed activities under Budget and Planning that take place at the campus level to Identify which will continue at each campus (BOR Functional data request). In addition, members discussed issues with enrollment and the drop out process based on BOR policy (automated drop process vs campus decision) and the significant impact on receivables. During the year, colleges adjust their annual revenue projection and expenditure budget based on enrollment.

Budget and Planning group recommended the implementation of a longer-term planning, a 3 or 5 year Spending Plan.

Per discussion of the new structure for Budget and Planning department, the group made the following initial recommendation:

a) one budget analyst/manager for three campuses would be necessary to cover the workload and to provide local support to all Departments.

b) one centrally located budget manager position overseeing the position control which drives projections of FT personnel cost for all 12 campuses and coordinating with HR on assigning the CF2 and required position funding (FOAP). This position will also manage the required changes to the positon funding source (GF vs OF) in CoreCT as well as provide reports on actual headcount and salary.

The group would like to learn more about the new Banner modernization and efficiencies created by utilizing Banner 9 functionality as well as Ellucian recommended best practices. Request to have Ellucian present a demo of the Budget Module in Banner 9 submitted to the CIO.

Mike Lopez, Director of HR Administration presented an overview of current System Office budget (at the position level), position control process (PFA form) and discussed the HR's undergoing effort to iron out all issues with job codes and position data. Issues with EA job codes will need to be evaluated, defined and formed standard job codes by grouping across the system.

Budget and Planning group next meeting scheduled for June 15, 2017.