



# Assessment Report

Governance (Committee) - Budget

## Committee

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### **Purpose Statement**

Make recommendations to District Governance Senate on policies, planning and other matters related to fiscal resources

- \*Review and revise budget assumptions that guide budget development
- \*Monitor the District's fiscal solvency
- \*Review the draft budget in its developmental stages
- \*Oversee, evaluate and assess the budget development process including making recommendations for Above-Base Funds and the District's Faculty Obligation Number
- \*Provide budget analysis to the District Governance Senate
- \*Develop and maintain a process for ensuring that resource allocations are linked to district planning
- \*Review and discuss implementation of policies related to fiscal resources
- \*Serve as a forum for dialogue on ongoing fiscal activities, such as monthly and quarterly reports
- \*Review and share information on the state budget
- \*Conduct annual assessment of its own processes

### **Membership**

Ron Perez - Co-Chair Administrator; James McDonnell - Co-Chair Faculty; David Loverin - Administration; Vicky Parra - Administration; Zachary Patterson - Administration; Louann Waldner - Administration; Tracy Redden - Faculty; John Sorber - Faculty; Manlia Xiong - Faculty; Madison Johansson - Adjunct Faculty; Freddy Lopez - Classified; Jeremy Mallouf - Classified; Mia Lippincot - Student; Eric Rodriguez - Student; Rainbow Park-Moore - Ex-Officio, Leangela Miller-Hernandez - Ex-Officio

# Governance (Committee) - Budget: Assessment Column Report

## Initiative

**Initiative Name:** General Expectations

**Initiative:** Agendas and minutes posted, quorum attained, attendance at meetings recorded in minutes.

**Initiative Status:** Active

**Academic Years:** 2025 - 2026

**Start Date:** 11/13/2025

### Result

**Result Date:** 03/09/2026

**Reporting Period:** 2025 - 2026

**Results:** Agendas have been posted for all meetings, thus far, for the 2025-26 academic year. Quorums attained for all but one meeting. Approved minutes have been posted for each meeting and attendance recorded.

**Report Type:** Mid-Year

**Result:** Carried Forward

**Actions**

**Follow-Up**

## Initiative

**Initiative Name:** Annual Above-Base Training

**Initiative:** Maintain training video on web page, meet all timelines, meet accreditation standard 1.4 - closing the loop on above-base resource allocation; send out surveys, follow-up (as needed) and report out to Budget Committee.

**Initiative Status:** Active

**Academic Years:** 2025 - 2026

**Start Date:** 11/13/2025

### Result

**Result Date:** 03/09/2026

**Reporting Period:** 2025 - 2026

**Results:** Above-base training video continues to be housed and accessible on the Budget Committee website. All dates were met for the the above-base timeline for this year. The committee will send out above-base surveys to close loop and continue meeting accreditation standard 1.4.

**Report Type:** Mid-Year

**Result:** Carried Forward

**Actions**

**Follow-Up**

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## Initiative

**Initiative Name:** Monitor Student Centered Funding Formula as it Affects COS

**Initiative:** Budget Committee will monitor and ensure effective use of resource allocations and promotion of greater equity and success for students with those state allocations.

**Initiative Status:** Active

**Academic Years:** 2025 - 2026

**Start Date:** 11/13/2025

### Result

**Result Date:** 03/09/2026

**Reporting Period:** 2025 - 2026

**Results:** Budget Committee received updates on the 25-26 budget appropriations via the Student Centered Funding Formula at their September 11, 2026 meeting.

**Report Type:** Mid-Year

**Result:** Carried Forward

**Actions**

**Follow-Up**

## Initiative

**Initiative Name:** Use of One-Time Funds

**Initiative:** Budget Committee will participate in one-time resource allocation process in 2025-26 according to the resource allocation manual/resource allocation diagram.

**Initiative Status:** Active

**Academic Years:** 2025 - 2026

**Start Date:** 11/13/2025

### Result

**Result Date:** 03/09/2026

**Reporting Period:** 2025 - 2026

**Results:** Use of one-time funds will be discussed at a future meeting date once we have an idea of the surplus.

**Report Type:** Mid-Year

**Result:** Carried Forward

**Actions**

**Follow-Up**

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