

Date: May 20th, 2026
To: IBPC Members
Subject: Summary Memo (May 12th Session)

A. Council Meeting Overview

This memo is intended to provide a brief summary of the topics discussed and perspectives delivered at the May 12th IBPC meeting. This summary is organized by agenda segments and includes the segment objective and a summary of discussion highlights.

- **Pre-work** [engagement form](#)
 - *Contextual video:* [SCORE Workgroup](#)
- **Shared in the calendar invite:**
 - [Budget Process Readjustment Values](#)
 - [Glossary of Terms](#)
 - [Budget Manual Policies](#)
 - [Sample: Legacy Banner Budget Development Sheet - the “PRE1”](#)
 - [Budget Reduction Proposal Form](#)
 - [Cost Centers](#)
 - [In-meeting active engagement form](#)
- **Post-session:**
 - [Engagement Form](#) - Budget Info Session Material
 - Google Form - Subcommittee & Co-Chair Interest
- [Meeting attendance](#)
- Meeting [recording](#) (passcode: 1pYh8\$of)
- [Slide deck](#)

B. Agenda Item – Opening Sequence

- **Objective:** *To provide an overview of the session and close the loop from the April meeting.*
- **Discussion Summary:** *Members were reminded of the perspectives they delivered in previous sessions that informed the Budget Process Readjustment Values, as well as their feedback on the IBPC’s charter and scope. The co-chairs discussed how those perspectives served as foundational elements for the day’s two agenda items.*

The group was also informed that over the course of the next several weeks, there will be a college budget update, and post-session, IBPC will review the presentation materials to help leadership understand anticipated questions and needed refinement of those presentations. IBPC feedback was captured in a post-session engagement form.

C. Agenda Item – Follow-Up: Structural Considerations for IBPC

- **Objective:** *To revisit the IBPC’s structure to begin planning for next year.*
- **Discussion Summary:** *The co-chairs noted two key concepts that emerged from the group’s April feedback, namely an IBPC co-chair group structure and a budget process subcommittee. The co-chairs shared a reminder that the work of the Shared Governance Taskforce could potentially impact each structure in the future, but the IBPC needs to continue to advance its ideas while that work plays out.*
 - **IBPC Co-Chair Group:** Members were presented with the idea of a four-person co-chair model moving forward, with one individual from the Finance team as a consistent part of the group as a “throughline,” and three other co-chairs (up to the IBPC to determine), with the CFO and EVP in co-executive sponsor roles. Discussion and feedback highlights included below:
 - The co-executive sponsors will ensure administrative support for those potential co-chairs without administrative assistants.
 - The Finance co-chair member “throughline” will be important for continuity.
 - The group conducted a Fist to Five vote, which resulted in a 4/5 vote to move forward with the idea; the group will vote for the co-chairs in the June meeting.
 - The elected co-chairs will make the determination of the timing and duration of co-chair terms (e.g., biennium or fiscal year terms).
 - **Budget Process Subcommittee:** Members were also presented with the idea for a summer subcommittee focused on the design of a new budget process, as the group will need to move quickly. Discussion and feedback highlights below:
 - Note that the IBPC will be putting “words into actions” to drive the design of the new process.
 - Questions surfaced regarding the timing with adaptive planning, as well as the alignment of the subcommittee’s work with the budget team’s efforts.
 - The co-chairs noted that this would be an iterative process, combining both the technical aspects of the budget work with broader opportunities to reimagine the process.
 - **Additional process question:** Is the summer working group being asked to redesign the budget model entirely, or use the existing model and decide on a process within that model?
 - The group conducted a Fist to Five vote, which resulted in a 4/5 vote to move forward with the idea.
 - Post-session, members received a Google form to indicate their interest in participating in either group.

D. Agenda Item – Assessing the Impact of SCORE on the Budget Process

- **Objective:** To deliver context for the work of the Strategic Course & Operations Resource Evaluation workgroup and consider its potential impact on PCC’s budget process.
- **Discussion Summary:** As a precursor to the draft budget process conversation, the SCORE workgroup leads, Karen Sanders and Karen Paez, delivered an overview of SCORE, noting the motivation for starting the work (an overspent instructional budget that lacks flexibility for demand-based growth), and the ultimate goal of supporting student completion and driving enrollment growth by optimizing current faculty instructional resources.

The leads walked through the process of building draft recommendations, and shared emerging recommendations for resource alignment, resource optimization, and operational processes (see [slide 14](#)). For the work of IBPC, SCORE was framed as a potential jumping off point for investment and growth recommendations, the creation of rubrics, and the implementation of data-informed budget reallocation processes, as well as a model for how to narrow scope, establish a knowledge baseline, and ensure a cross-functional team.

E. Agenda Item – Draft Budget Process Outline

- **Objective:** To generate feedback on the draft budget process outline and key budget process components.
- **Discussion Summary:** The Finance team presented a draft budget process outline, starting with an overview of the guiding values of the process (generated from IBPC feedback), existing budget development process resources, and a breakdown of the key roles and responsibilities within the current development process (of Cabinet, the Budget Office, College Unit Leads, and Divisions/Departments/Managers/Stakeholders).

The Finance team then shared initial opportunities for review and redesign, and asked the IBPC for perspectives on what the new development process needs to accomplish. The IBPC then participated in a table exercise to deliver more granular feedback on the process redesign. Member feedback highlights are included below:

- **Individual Reflection Highlights:** “What Do You Believe is Most Important for a New Budget Development Process to Accomplish?”
 - The budget process should be anchored in student success, not process mechanics.
 - Along these lines, the process should connect budget decisions to institutional values and outcomes, not just procedural compliance.
 - Concerns about the accuracy of current budget data in Workday: can we build accurate projections or audit past spending?

- How might the data sources and analysis from the SCORE efforts offer insight to broader budget process planning?
 - Budget information must be communicated in ways that non-finance experts can understand (e.g., visuals and plain language).
 - Need to address a key disconnect: budget staff hold authority while department managers hold responsibility, but the two rarely interact effectively.
 - Need to streamline the volume of forms and documents.
 - Desire to stagger leadership transitions to preserve knowledge across changes.
 - One member noted that we need to develop a formula that captures the increased revenue effect of adding a section.
- **Table Exercise Highlights: Reflections on the Process Redesign**
 - Need to crosswalk tools, so users aren't navigating contradictory frameworks (e.g., align the Budget Reduction Proposal Form and the budget development worksheet).
 - Suggestion to replace the spreadsheet with a purpose-built form to collect info.
 - Access to reliable data remains a blocker (see above).
 - Values need to be operationalized; the *why* behind decisions needs to be explicit and built into the process.
 - We need to get granular with what we mean by “process” as the subgroup begins.
 - Need to demystify what happens after budget forms are submitted to Cabinet.

F. Naming Feedback Loops

The below ideas were pulled from throughout the meeting dialogue and feedback, and identified as potential agenda topics or activities for future sessions and/or resources the Council might develop.

- Post-session feedback on the Budget Info Session materials will be processed and delivered to Cabinet ahead of presentations.
- Ahead of June, the co-chairs will review the interest form for the co-chair subgroup (in anticipation of a June vote), as well as interest in the Budget Process Subcommittee.

All feedback loop items from the previous sessions can be found in the summary memos from [October](#), [November](#), [December](#), [January](#), [February](#), [March](#), and [April](#).

- Items addressed from the previous feedback loop sections:
 - IBPC perspectives on the group's structural considerations directly led to the proposed Budget Process Subcommittee and four-person co-chair group structure.
 - IBPC feedback informed the Budget Process Readjustment Values document, which serves as a foundational guide in developing the new process.