FOOTHILL COLLEGE
INSTITUTIONAL RESEARCH & PLANNING

DATE: April 29, 2022

TO: Bret Watson, Vice President, Finance and Administrative Services

FROM: Elaine Kuo, College Researcher

RE: Annual Budget Form Evaluation, 2021-22

Overview

As part of the annual resource request process, programs with a resource request are required to complete an online form for prioritization by a resource request review committee. The online survey invite was sent to 27 employees, a mix of administrators, faculty, and classified staff. A total of 18 respondents completed the survey for a 67% response rate. Full survey results (along with respondent comments) and the survey instrument are included at the end of this report.

Highlights

- The majority of respondents indicate that it was "easy" or "somewhat easy" to access the annual budget request form (89%).
- Roughly half of respondents indicate the level of support received was "just right" (56%).
- Almost one-fourth of respondents needed more than two (2) hours to complete the annual budget request form (22%).
- Roughly one-fourth of respondents said it was "not easy" to find someone to answer questions (22%).
- The top three (3) issues encountered were:
  - Saving/Printing a copy of the completed form;
  - Gathering the proper information to submit; and
  - Navigating the online form's organization/flow to get to appropriate sections.
  Meanwhile, about one-fourth of respondents did not experience any issues (22%).
- Improvement suggestions include:
  - Delaying the funding source to a later stage in the budget request process;
  - Creating a template or ability to save previous work (and update annually);
  - Finding a way to include adjunct faculty in the budget request process;
  - Creating an instrument/asset repair budget category;
  - Developing better understanding of fund restrictions.

Methodology

The annual budget request period began in Fall 2021 and closed at the end of January 2022.The annual budget form feedback survey was administered from February 7-February 22, 2022. This survey was sent to 27 employees and this contact list was provided by the Finance and Administrative Services Office. IRP sent out email invites with the survey link embedded. Survey form was created using Remark survey software and reminder emails were generated for non-respondents.

Source

FH IRP [Resource Request Evaluation Survey Results AY22.bqy]

Annual Budget Request Process Evaluation
Survey administration
February 7 - February 22, 2022

Survey sent to 27 people
18 respondents or 67% response rate

Q1: Indicate how easy it was to access the annual budget request form.

Response	N	Percent
Easy	9	50%
Somewhat Easy	7	39%
Not Easy	2	11%
Total	18	100%

Q2: Approximate the amount of time it took for you to complete the annual budget request form.

Response	N	Percent
< 30 minutes	3	17%
30 minutes > 60 minutes	4	22%
60 minutes > 90 minutes	4	22%
90 minutes > 120 minutes	3	17%
> 120 minutes	4	22%
Total	18	100%

Q3: Did your program review self-study action plans inform the budget requests made?

Response	N	Percent
No	3	17%
Yes	7	39%
Self-study not completed yet	8	44%
Total	18	100%

Q4: Indicate the level of support you received to complete the annual budget request form.

Response	N	Percent
Just right	10	56%
Not enough	7	39%
No Response	1	6%
Total	18	100%

Q5: Indicate how easy it was to find someone to answer questions about the annual budget request form.

Response	N	Percent
Easy	6	33%
Somewhat Easy	6	33%
Not Easy	4	22%
I did not have any questions	2	11%
Total	18	100%

Q6: Indicate if you encountered any of the following issues when filling out the annual budget request form.

Response	N	Percent
Experienced no issues	4	22%
Understanding instructions	3	17%
Difficulty gathering proper info	6	33%
Not finding valid sections	3	17%
Form flow difficult to navigate	4	22%
Online site difficult to navigate	1	6%
Thought I completed but didn't	0	0%
Submitting online form	1	6%
Saving/Printing form	7	39%
Other	7	39%

Other: Please explain

I understand the need to fill out a budget request form, but this is just a request to prepare a broken instrument, a $60K asset, so many of these questions seem superfluous

Saved copy did not provide complete form. Partial only.

Was not able to access last year's form without help

description of funding source, editing once submitted

not being able to save the form and then go back to it to make changes before submitting it.

understanding the restrictions for the various funding sources such as what could Perkins pay for (i had to look this up myself)

Q7: Share any suggestions you have about improving the annual budget request form and/or process.

1. Fiscal Year - it isn't clear which FY the funding request applies to because the request period falls in the middle of the current FY so FEI completes the form in consideration of the upcoming FY 2. New Staffing - the request only asks for new staffing when we need to secure funding for the existing staffing 3. Form's Template - is not user friendly; the answer box doesn't expand so we can see our written response in the box. So we have to type the response in word doc then paste it into the form. Thank you for asking for our feedback.

I am still anxiously awaiting a response regarding the requests. It feels like they disappeared into the abyss with absolutely no follow up. When and how will we be given a decision. What happens next? Timeline? To put so much workin into requests and then hear nothing for weeks is quite disappointing.

I understand that providing justification is important for making decisions, but when every single item needs to be submitted separately on the form, the process creates a lot of justifications that need to be written when one would probably suffice. In my (very limited) experience, it doesn't really seem that a lot of the information provided is even taken into account when decisions are made, but I could definitely be mistaken about that.

It would be nice to have a "total" section that shows the total amount of ALL monies requested at the bottom of a form that includes ALL sections filled out. It was kind of strange that everything was separated. I had to contact the "point person" to understand how to fill it out. The "point person" was extremely helpful during the process.

It would be nice to have a template to work on (I made my own) and save before submitting it. That way if I need to make any changes I can do that before submitting it. Currently, once you start filling out the form, you can't save it in progress. If you need to stop, then you have to start over again.

Maybe I missed it but last year it was easy to see what could be placed in each funding source. I would like to edit a submission after submitted - would also like to see the spreadsheet prior to submission - don't know if that's possible

Please create a process where our budgets can be revised each fiscal year. Meaning we are sent last years to be updated. Also so that we can work on it and save our progress. No time to sit and do it all at once. We also need more support to obtain quotes. We spend a ton of time finding the products, getting quotes, etc. why doesn't the school provide this level of support?

The absolute best part of the new system is that I do not have to resubmit ongoing costs.

The ongoing issue with the budget requests is the idea that we request within the various silos and then have a debate about where the money can come from. If that decision is going to be made somewhere else, anyway. Maybe we should just have one form (or at least fewer, and let the strategizing re: money pots come later. Trying to assess whether a request should go to Perkins or Lottery or B Budget should not be happening at this point in the process. Having it due during a Dean transition also did not help.

The question what will happen if this request is not funded is just stupid.

There should be a more streamlined process to get assets repaired on campus. We have a $60K instrument which is easy to use, and should be part of the SLI student outreach program. We really should have an instrument repair budget.

We need to find a way to include adjunct faculty in the budget requests. After the budget request was submitted I learned that adjunct faculty in our department needed equipment to teach hybrid or hiflex instruction. Although I included all faculty in this process, I find that adjunct faculty do not voice their needs. This is a huge issue since equipment needs for hybrid or online are rarely considered with lottery funds. I am hoping this mindset will change for administration to value online, zoom and hybrid courses and also ways to include the adjunct voice.

Annual Budget Request Process Feedback

(1) Indicate how easy it was to access the annual budget request form.
- ○ Easy
- ○ Somewhat Easy
- ○ Not Easy

(2) Approximate the amount of time it took for you to complete the annual budget request form.
- ○ 5 minutes or less
- ○ 6-10 minutes
- ○ 11-15 minutes
- ○ 16-20 minutes
- ○ 21 minutes or more

(3) Did your program review self-study action plans inform the budget requests made?
- ○ Yes
- ○ No
- ○ Have not completed program review self-study yet

(4) Indicate the level of support you received to complete the annual budget request form.
- ○ Too much
- ○ Just right
- ○ Not enough

(5) Indicate how easy it was to find someone to answer questions about the annual budget request form.
- ○ Easy
- ○ Somewhat Easy
- ○ Not Easy
- ○ I did not have any questions

(6) Indicate if you encountered any of the following issues when filling out the annual budget request form.

☐ Did not experience any issues
☐ Understanding the instructions of completing the online form
☐ Difficulty gathering the proper information to submit to the site
☐ Not finding sections valid to my resource request
☐ Organization/flow of form made it difficult to navigate the appropriate sections
☐ Navigating the online site
☐ Being notified that I did not complete the form when I thought I did
☐ Submitting the online request form
☐ Saving/printing a copy of my completed form
☐ Other (please explain) [   ]

(7) Share any suggestions you have about improving the annual budget request form and/or process:

Submit

Modified 01.14.22