

1 Summary As a result of the Meet and Confer agreement effective July 2002, all unexpended Faculty  
2 Professional Growth funds are eligible for carry forward from one budget year to the next. Establishing a  
3 process for managing this fund so that it works for the greater good of all faculty is critical.

- 4 • What process should be used to determine the allocation of rollover funds from the previous year?
- 5 • What group has the information to make this decision?
- 6 • What group has the responsibility to make such a decision?
- 7 • What group should have the authority to make such a decision?

## 8 9 10 Rollover FPG (Faculty Professional Growth) funds

11  
12 As a result of the Meet and Confer agreement effective July 2002, all unexpended Faculty Professional Growth  
13 funds are eligible for carry forward from one budget year to the next. RFP A.9.2. In July 1998, RFP A.9.1 FPG  
14 (Faculty Professional Growth) funds became fungible (allows for movement between the categories)

15  
16 The RFP in Section A.9.1 states:

- 17 • Monies allocated for the fiscal year will be fungible among all the Professional Growth accounts. The  
18 FPG (Faculty Professional Growth) committee will make a recommendation to transfer funds to the Vice  
19 Chancellor For Academic Affairs who will approve the transfer.

20  
21 The 2002-2003 FPG budget is \$1,310,000.

22 The RFP specifies a division of the FPG budget as follows:

23	
24	Sabbaticals \$755,000 (57.6%)
25	Fees and Summer Projects \$269,400 (21.8%)
26	Travel budget, dispersed to each college based on the percentage of RFP faculty \$285,600 (20.5%)
27	

28 When new funds are negotiated in Meet and Confer, the amount per category designated in the proposal is  
29 hammered out in the negotiation process.

30  
31 In July 1998 by a verbal agreement with Vice Chancellor Glasper unused funds for sabbaticals and projects had  
32 been carried forward even though it was not included in the RFP. The premise was that the funds were to be spent  
33 during the current academic year to the best of the committee's ability; funds were not to be saved to increase  
34 dollars available.<sup>1</sup> Those funds were managed by the FPG (Faculty Professional Growth) committee based upon  
35 need for either sabbaticals or projects.

36  
37 The two years of rollover funds though helpful in funding some additional sabbaticals did create some harm in the  
38 Meet & Confer process because the budget records kept by the part-time temporary FPG secretary were incomplete.  
39 As a result when the Meet & Confer team was negotiating hard for an increase in funding for Professional Growth  
40 the district budget office was showing a balance of approximately \$400,000 remaining unspent in April. Based on  
41 that information increases for funding were largely ignored. It is critical that these funds be used each year and the  
42 need for the dollars is genuine. See the FPG (Faculty Professional Growth) funding history at:  
43 <http://www.mcli.dist.maricopa.edu/fpg/docs/funding1990-2001.html>

44  
45 This year for the first time, unused travel dollars were returned to the central FPG account in the amount of \$53,889.  
46 Perhaps this is an unusual event as some travel plans were changed during the 2001-2002 academic year because of  
47 the events of 9/11. Either way the potential for unexpended travel funds will continue. It is necessary to clarify the  
48 process to allocate unexpended funds thus deciding how the funds will be apportioned. In April 2002 when the  
49 realization occurred that travel funds might be collected there were a variety of opinions re: how the travel dollars  
50 would be handled. Some representatives both in FEC (Faculty Executive Council) and the College Travel  
51 committees believed the dollars should be returned to the college from which the money was unused. The proposal

---

<sup>1</sup> Per Bob Galloway, FEC (Faculty Executive Council) Pres. July 1998-99

52 to return the unused dollars exactly as collected is complicated by the fact that the balances vary significantly  
53 between what was collected and returned to the general fund and what colleges believe the final balance was.<sup>2</sup>  
54

55 This creates a larger question in looking at the entire FPG (Faculty Professional Growth) budget and its ability to  
56 rollover all unused funds and the ability to move funds between accounts albeit approved by the Vice Chancellor of  
57 Academic Affairs.

- 58 • What process should be used to determine the allocation of rollover funds from the previous year?
- 59 • What group has the information to make this decision?
- 60 • What group has the responsibility to make such a decision?
- 61 • What group should have the authority to make such a decision?

62  
63 **Options:**

- 64  
65 1. The FPG (Faculty Professional Growth) committee would monitor and manage the roll over funds keeping  
66 the amounts within the current categories. The FPG (Faculty Professional Growth) chair would bring  
67 budget actions to FEC (Faculty Executive Council) for endorsement. Any changes in amounts per category  
68 must be approved by the Vice-Chancellor of Academic Affairs. Unexpended travel dollars would be  
69 reallocated to the colleges dividing the unexpended funds using the established percentage per RFP faculty  
70 positions.  
71
- 72 2. Upon receiving a final budget report of the FPG accounts, the FEC (Faculty Executive Council) would  
73 recommend allocation of the funds for use by FPG .  
74
- 75 3. All unused funds (includes registration fees/projects, sabbatical funds & travel dollars) would be held in a  
76 general FPG (Faculty Professional Growth) account and used on an as needed basis, monitored by FPG  
77 (Faculty Professional Growth). The FPG Committee Chair would seek Vice Chancellor approval when  
78 necessary. A general accounting would be provided to FEC (Faculty Executive Council)by the FPG chair.  
79
- 80 4. All FPG (Faculty Professional Growth) rollover funds be managed by the FPG (Faculty Professional  
81 Growth) committee and allocated among the three categories as needed through out the current year. The  
82 FPG Committee Chair would seek VC approval when necessary.  
83  
84  
85

86 The FPG (Faculty Professional Growth) Steering Committee reviewed these options at their Sept. 26<sup>th</sup> meeting and  
87 endorsed option 1.

- 88 • **The advantages of this option include:**
  - 89 ○ Maintains established budget percentages to the three funded areas (Registration fees/projects,  
90 Sabbaticals & travel.
  - 91 ○ Reduces potential leadership conflict re: the funding percentages of each category particularly for  
92 smaller amounts. (here we should define smaller amounts)
  - 93 ○ Allows FPG (Faculty Professional Growth) & FEC (Faculty Executive Council) to work together  
94 in reviewing the budget allocation. As a history of the rollover funds develops a review of the  
95 allocation between the areas will have more data upon which to conduct the debate.
- 96
- 97 • **Disadvantage of this option:**
  - 98 ○ Unused funds may not be used in another area.
- 99

100 Much has been revised and improved in the FPG (Faculty Professional Growth) program in the past three years.  
101 The addition of a fulltime permanent administrative secretary has greatly increased the record keeping.  
102 Providing faculty access to the FPG (Faculty Professional Growth) web site provides an opportunity for  
103 increasing interest and use of the program. Establishing a process for managing this fund so that it works for  
104 the greater good of all faculty is critical.

---

<sup>2</sup>See attached Excel spread sheet to review amounts