HELENA COLLEGE
UNIVERSITY OF MONTANA

BUDGET COUNCIL MINUTES
MONDAY, SEPTEMBER 22, 2:30 P.M.
DON LECTURE HALL MEETING

Table 1: Budget Council Members

- ☒ **Cari Schwen,** Exec. Director of Fiscal Services (CHAIR)
- ☒ **Sandra Bauman,** Dean/CEO
- ☒ **Jessie Pate,** Director of IR & Effectiveness
- ☒ **Jason Grimmis,** Director of Crisis & Emerg. Resp
- ☒ **Amy Kong,** Director of eLearning & Fac. Dev.
- ☐ **Mel Ewing,** CIO
- ☒ **Robyn Kiesling,** Exec. Dir. Gen Ed & Transfer
- ☒ **Tod Dumas,** Aviation Instructor
- ☒ **Larry Taylor,** Anatomy & Physiology Instructor
- ☒ **Patricia Pierson,** Librarian
- ☒ **Paige Payne,** Executive Assistant (recorder)

BC Mission: *The Budget Council utilizes broad stakeholder representation to carry out responsible and realistic budget planning that aligns with the strategic goals of our campus and the Montana University System. We strive to foster a culture of financial integrity and collaborative governance, ultimately contributing to the sustained growth and success of our institution.*

Helena College Mission: *Helena College supports our diverse community by providing the paths and tools necessary to assist learners in achieving their educational and career goals.*

Mastermind Discussion:
Note: Meeting canceled on 8/25/2025

Annual Plan
- Implement data dashboards to be used in decision-making. Potential use for trend analysis (revenue, expenditures, etc.)
- 3-year budget roll-out. BC will develop a template to roll out to departments. Guidelines/expectations for their 3-year ask/forecast.
- Determine whether BC develops a template for long-range forecasting/equipment renewal schedules?

3-year Budget Template Discussion

- Add a narrative so the reason for the request can be revisited; a description of the reason for the ask.
  - Advantages: identify trends and recurring costs.
  - The narrative and/or justification will be required.
  - Add various designations: required, fixed, cost, priority, renewal/replacement/enhancement.
    - Under priority, identify the risk of not funding; identify additional funding sources.
  - Provide a guideline within the template, like the annual plan.
  - Is there a better program other than Excel that can be easily transferred back into Excel? A separate tab in Excel?
- Inflation's impact:
  - Is there a percentage prediction to add to certain categories?
  - Add a reminder to plan for inflation.
  - Jessie created a worksheet to project her budget that she may be willing to share.
- Add a line for personnel additions.
  - Career ladder, promotion, merit, and new positions.

- Trivium will help give data to prioritize items that cannot be funded within the current or upcoming budget year.
- Offer a workshop for budget managers to talk about forecasting and projections over three years.
- Put the fee pot balances in with the budget sheet and how it accrues.
    - Include how much it accrues per student.

Potential Revenue Shortfall:

- Non-resident and WUE enrollment are lower in numbers at Helena College and across MUS. The revenue shortfall is projected at $40-50K.
    - Dual enrollment revenue has not been completed. The final report will be released at the next meeting.
- Helena College may be impacted negatively by the lowered interest rate.

Budget Council Membership:

- Amy Kong will stay on the committee for one more year.