



An update on planning initiatives under way to foster efficiency, effectiveness, and excellence.

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Integrated Planning

Mt. SAC is committed to integrity and a process for providing high quality education congruent with the College's mission that is "to welcome all students and to support them in achieving their personal, educational, and career goals in an environment of academic excellence." In order to support the College's mission statement, on April 15, 2009 representatives from the President's Advisory Council (PAC), Institutional Effectiveness Committee (IEC), and the Budget Committee gathered. President Nixon explained that the purpose of the joint meeting was to develop a common understanding of institutional planning and hear about the committees' work. A further purpose was to understand how institutional planning is related to accreditation and evaluate the College on how well it is doing on planning, evaluation, integration of planning and resource allocation and improvement. The President went on to say that ultimately there should be a focus on reinforcing the importance of planning and evaluation for students and effective teaching and learning.

The meeting began with the chairpersons of each committee discussing their work (<http://inside.mtsac.edu/organization/committees/>). President Nixon reinforced PAC's role in monitoring and coordinating overall institutional planning. In its role as the College's main planning body, PAC has reviewed the College's mission statement and recommended changes to the Board of Trustees. It also developed College Goals and Strategic Objectives. Not only does PAC function as the primary institutional planning council, but PAC has the responsibility of evaluating institutional planning.

Dean Debbie Boroach, IEC Chairperson, discussed the current model referred to as Planning for Institutional Effectiveness (PIE). This model is used to capture and document the planning and program review done at the unit and team levels, and to relate this planning to current and future institutional goals and objectives. This process is conducted annually by each unit of the College, and all unit participation is documented in e-PIE (an electronic version of PIE). Dr. Boroach explained the PIE process begins at the unit level and works its way through team summaries. The development of student learning outcomes is a major component of e-PIE. Through this campus-wide, faculty-lead, dialogue-rich and evaluative process, SLOs are measured and assessed to determine how well learning is occurring so that changes to improve learning and teaching can be made and allocation of resources (monetary and non-monetary) recommended. Using the data-driven PIE process allows for reliable qualitative and quantitative information about the College's programs and how well it is achieving the College's goals through use of an evaluation process that allows for clear inquiry, meaningful interpretation, and whose results are broadly communicated (i.e., on the IEC website). PIE allows the College and units a place to demonstrate its planning and evaluation processes.

Evaluation of the PIE process is continuous. Each year, IEC requests and receives feedback via the manager and team summaries on process clarity, utility, ease of use, effectiveness of documents and training, etc. This feedback is incorporated into adjustments for the following year's PIE process. IEC also considers

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the Accrediting Commission for Community and Junior Colleges (ACCJC) rubric and standards for planning and evaluation in identifying process components to be strengthened. More information on the PIE process can be found in the two previous *Planning for Excellence* newsletters (<http://www.mtsac.edu/administration/research/newsletters.html>). The PIE process clearly exemplifies an evaluative, integrated planning effort (i.e., more than one stakeholder is required to participate in the plan in order to achieve the desired outcome).

Vice President Gregoryk, Budget Committee Chairperson, said the history of the Budget Committee is that the budget drives planning; however, today's process is reversed. Mr. Gregoryk said that because of work going into planning (including identification of potential resources), the Budget Committee is re-evaluating its role. The Committee is also reviewing its current resource allocation process and wants to make it more easily understood. Mr. Gregoryk distributed a draft proposed budget review and development process prepared by Professor Kaljumagi. The Budget Committee will have a final budget process in 2009 to 2010.

The meeting progressed to a discussion of the major planning documents at Mt. SAC. The Educational Master Plan (EMP), as Vice President Burley said, is a relatively new document and is part of a complete planning process and can be used as the foundation for much of the institution's other planning activities. The EMP was developed for the purpose of projecting the College's program and service needs from the present to the year 2020. While it is recognized that the content of the EMP represents a snapshot in time, it is important that projections be used to anticipate the needs of future students and residents of the District. The processes for the EMP ensure that planning is integrated with resource planning and distribution to achieve student learning outcomes. Through a collaborative, across-campus process, the EMP was created by employees with the help of consultants and includes information about each department in the College with summary narratives that describe the program or service and its current and future needs and plans. Plans are underway to disseminate this substantial integrated planning document to the campus community. According to Dr. Nixon, the EMP is a document that may remain static for up to five years whereas other master plans are more dynamic. He added that the EMP would inform work at the academic or program department level as well as for both Facilities and Technology Master Plans.

Vice President Gregoryk said that the College is planning to use a collaborative approach to update its Facilities Master Plan (FMP) by the end of the 2009 to 2010 year; it was last updated

in 2005. The integration of the EMP with the FMP is crucial as is the link to the Technology Master Plan (TMP).

Chief Technology Officer Vic Belinski said a Technology Master Plan (TMP) is being drafted and will be on the web for employee comment in 2009 to 2010. The TMP will be integrated with the EMP and FMP. As IT is an integrated function of the College, it is important that the TMP embody this integration and allow for an evaluative component.

Once the integrated planning document discussion ended, Barbara McNeice-Stallard, Director of Research and Institutional Effectiveness, presented an overview and led a discussion on institutional planning, that includes department-level input (through PIE) as well as participatory governance input. Based on the College's mission statement and goals, planning involves deciding the College's focus/priorities, setting institutional goals, developing institutional/departmental strategies, outlining tasks, and creating schedules to measure if the goals are reached, evaluating the outcome, and doing it all over again (i.e., think, plan, do, and evaluate cycle). A copy of the presentation can be found at [http://www.mtsac.edu/administration/research/pdf/tips/Introduction to Planning 2009.ppt](http://www.mtsac.edu/administration/research/pdf/tips/Introduction%20to%20Planning%202009.ppt).

Dr. Nixon reiterated that integration of plans is an important theme and also stressed the need to evaluate our evaluation processes and to make improvements as needed and adjust resource allocation. Director Barbara McNeice-Stallard led a discussion of the many ways unit planning and integrated planning is occurring across campus, including PIE, SLOs, VTEA, administrative systems planning, Banner, reviewing new processes, class schedules and enrollment, hiring, etc. Because it is important that we not work in a vacuum, there was discussion on how we can continue to integrate our planning and plans and provide documentation or evidence of our work. Unit level planning was seen as "the first step of the ladder."

Committee members were asked to review the ACCJC *Rubric for Evaluating Institutional Effectiveness – Part II: Planning* (see table on page 3) to determine where they felt the College was in its level of implementation. Nearly everyone agreed that the College was well into the Proficiency category and in Sustainable Continuous Quality Improvement in some areas. This led to a lively discussion on what Sustainable Continuous Quality Improvement would "look" like. Mr. Belinski commented that he believes the College does a great job of planning and integrated planning, but noted that Mt. SAC looks at itself with a very critical eye.

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Dr. Nixon thanked everyone for attending and for the great work they do across campus and planning that they do that is comprised of evaluation, goal setting, resource distribution, implementation, and re-evaluation. It is clear that dialogue guides institutional change and is an ongoing self-reflection process with a goal to improvement. He said he felt significant

progress was made today on re-defining institutional planning and that we all have a better and more common understanding of the College's institutional planning and integration of its components. The group indicated the need for periodic and focused meetings like today's and a follow-up meeting will be scheduled in 2009 to 2010.

Accrediting Commission for Community and Junior College (AACJC) / Western Association of Schools and Colleges (WASC)

Rubric for Evaluating Institutional Effectiveness — Part II: Planning

Levels of Implementation	Characteristics of Institutional Effectiveness in Planning <i>(Sample institutional behaviors)</i>
Awareness	<ul style="list-style-type: none"> • The College has preliminary investigative dialogue about planning processes. • There is recognition of case need for quantitative and qualitative data and analysis in planning. • The College has initiated pilot projects and efforts in developing systematic cycle of evaluation, integrated planning and implementation (e.g., in human or physical resources). • Planning found in only some areas of College operations. • There is exploration of models and definitions and issues related to planning. • There is minimal linkage between plans and a resource allocation process, perhaps planning for use of "new money." • The College may have a consultant-supported plan for facilities, or a strategic plan.
Development	<ul style="list-style-type: none"> • The Institution has defined a planning process and assigned responsibility for implementing it. • The Institution has identified quantitative and qualitative data and is using it. • Planning efforts are specifically linked to institutional mission and goals. • The Institution uses applicable quantitative data to improve institutional effectiveness in some areas of operation. • Governance and decision-making processes incorporate review of institutional effectiveness in mission and plans for improvement. • Planning processes reflect the participation of a broad constituent base.
Proficiency	<ul style="list-style-type: none"> • The College has a well documented, ongoing process for evaluating itself in all areas of operation, analyzing and publishing the results and planning and implementing improvements. • The institution's component plans are integrated into a comprehensive plan to achieve broad educational purposes, and improve institutional effectiveness. • The institution effectively uses its human, physical, technology and financial resources to achieve its broad educational purposes, including stated student learning outcomes. • The College has documented assessment results and communicated matters of quality assurance to appropriate constituencies (documents data and analysis of achievement of its educational mission). • The institution assesses progress toward achieving its education goals over time (uses longitudinal data and analyses). • The institution plans and effectively incorporates results of program review in all areas of educational services: instruction, support services, library and learning resources. • Program review processes are ongoing, systematic and used to assess and improve student learning and achievement.
Sustainable Continuous Quality Improvement	<ul style="list-style-type: none"> • The institution uses ongoing and systematic evaluation and planning to refine its key processes and improve student learning. • There is dialogue about institutional effectiveness that is ongoing, robust and pervasive; data and analyses are widely distributed and used throughout the institution. • There is ongoing review and adaptation of evaluation and planning processes. • There is consistent and continuous commitment to improving student learning; and educational effectiveness is a demonstrable priority in all planning structures and processes.