Integrated Planning Summit
Mt. San Antonio College
October 12, 2009

EMP: Educational Master Plan
TMP: Technology Master Plan
FMP: Facilities Master Plan
PIE: Planning for Institutional Effectiveness
IEC: Institutional Effectiveness Committee
PAC: President’s Advisory Council
IT: Information Technology Department
Budget Committee

Student Learning Outcome
By the end of the day, attendees will know how to use the planning models (e.g., master plans and committee structures) for integrated planning.

Assessment
80% of the groups will be able to identify at least one way that the planning models can be integrated to help find a solution for the given scenario.

Summary
Faculty, staff, and administrative representatives from key college governance committees, leaders of the college’s master plans, and key department personnel convened for a day of information sharing, dialog, problem solving, and resolution planning. The attendees included:

Art Morales, Classified
Audrey Yamagata-Noji, Management
Barbara McNeice-Stallard, Management
Eric Kaljumagi, Faculty
Gary Nellesen, Management
John Nixon, Management
Kate Scott, Classified
Kristina Allende, Faculty
Laura Martinez, Classified
Linda Baldwin, Management

Michael Gregoryk, Management
Michelle Grimes-Hillman, Faculty
Odette Richardson, Classified
Paul Kittle, Faculty
Priyadarshini Chaplot, Classified
Rene Kouassi, Student
Shanti Atashpoush, Management
Terri Long, Management
Virginia Burley, Management
The consultants in attendance included:
  David Palais, IT Consultant
  Joyce Black, Facilities Consultant
  Marlene Imirzian, Facilities Consultant

**Integrated Plans and Committee Structure**

John Nixon welcomed the *Summit* team members and emphasized the extraordinary importance of integrated planning and how it is linked to effectiveness of resources and best programs and services for students. Intrinsically, it is a time to look inward at all levels across the college and beyond using the college mission as the driving force. It is through examining these main planning processes that we get to the purpose of today which is to learn about integrated planning, the relationship between department/unit SLO/AUO PIE work and the master plans. We are a college that is proud of its programs and services and we will continue to evaluate them and improve them based on a planning model that uses data for decision making.

Extrinsically, the accreditation commission (ACCJC) requires integrated planning endeavors that include master plans. Our planning needs to be driven by long range plans that are master plans; they are focused on the college’s mission statement.

Campus leaders presented three master plans and the college’s main planning process:

- **Educational Master Plan (EMP)**
  - Virginia Burley discussed how the EMP was created over the last year based on the idea of growth. As growth is not an option now, there is the need to re-examine and re-frame the EMP to focus the college based on the current and future needs for enrollment that are mostly decreasing. How can the departments use the EMP as it was created, re-evaluate it for today’s circumstances and use it for future planning? Given the current conditions, how do we take growth data and scale it back because of the funding? Discussions are underway as to how to release the 300+ page EMP in a meaningful manner.

- **Facilities Master Plan (FMP)**
  - Gary Nellesen provided an overview of facilities planning. He discussed how the 2004 to 2005 FMP is being updated this fiscal year to include the Bond Measure RR projects. The new FMP will include a more detailed finance planning component that would demonstrate where the funding is coming from for that building (e.g., State or Bond). He also discussed how facilities planning is becoming standardized (e.g., standard IT needs for classrooms) and how the collaboration required to the facilities project proposal (FPP) includes all constituents from start to finish. Gary indicated that they are always improving their planning processes and
one improvement to be done soon is to link the infrastructure needs (e.g., piping) to the FMP so the costs are transparent.

The integration of the revised FMP with the other master plans is the goal of the team working on this update. In response to a question from the group, Gary indicated that the Measure R program has increased the number of classrooms, but the most significant growth in square footage will be with the Measure RR program. The increase in space size is done using many methods including being creative with how classrooms are built and used (e.g., Active Labs), and constructing flexible teaching spaces and classrooms that are correctly sized for the classes that we teach. John Nixon indicated that the old LRC building, once it is vacated, will be used for new teaching space. At some point in the future, he also said that the college will need to consider using off-site locations because we only have so much space to grow on the campus.

The FMP consultants, Marlene Imirzian and Joyce Black, also talked about the FMP. They said that they look not only at the building, but also at the space outside the building for learning and socializing opportunities. For the buildings, they recommend flexible building models to allow for changes.

- Technology Master Plan (TMP)
  - Vic Belinski discussed the TMP and how IT does not sit in a silo and thus the TMP needs to be pervasive throughout the college master planning efforts. The TMP takes into account the other master plans and includes a strategic planning section for long-range planning as well as a tactical section for short-term planning such as the next year or so. The tactical portion will be updated more frequently than the strategic section.

  Shanti Atashpoush discussed how the IT team talking with the departments to determine their needs led to the classroom technology standards for new buildings. The standard allows the teacher to go into any new classroom and know exactly how to work with the same equipment, thus allowing more time for instruction. The college is getting better at dealing with IT issues ahead of time.

  Vic said that the TMP will be on the IT web site shortly for the college to review. He indicated that the college should have a central place for all master plans.

- Planning for Institutional Effectiveness (PIE)
  - Virginia Burley discussed the program review process – PIE. More information about PIE can be found in the Planning for Excellence newsletter article
Although it was not intended, the focus of the college to link program review with resources is making some people think about program review as a resource tool as opposed to a planning model.

PIE includes the college’s mission statement as the driving force behind all the planning the departments/unit do in alignment with the college’s goals and team goals, and it allows for the integration of outcomes assessment (i.e., SLOs and GEOs). We use a software system, TracDat, to help organize the information in one place and to make planning process accessible electronically. We use a team summary approach that allows the deans/directors to summarize planning and accomplishments in their areas and the vice presidents to summarize their teams’ accomplishments. This process allows for more transparency about the planning endeavors across the campus. Each year Institutional Effectiveness Committee conducts a careful evaluation of the planning process and how the evaluation is done in order to make recommendations for improvements for next year’s cycle of PIE. PIE is an ongoing process with an annual reporting requirement.

Committee chairs also shared the work of their respective groups:

- **Budget Committee (Budget Allocation Model)**
  - Michael Gregoryk discussed the Budget Committee’s Allocation Model. PIE is one of the main sources of resource requests that are used to drive the allocation model. On October 21, 2009 the Budget Taskforce will meet to review all the ideas employees submitted for reducing costs at Mt. SAC. This process of asking employees for their ideas in a systematic manner was the first submittal from employees for cost-cutting/revenue-generating ideas. These recommendations will be reviewed by the Budget Task Force for formal submission to the Budget Committee, then to PAC and to the President.

- **Institutional Effectiveness Committee (PIE Process)**
  - (see above description of the PIE process)

- **President’s Advisory Committee (Accreditation; Planning and Goal Setting)**
  - PAC is the major planning body for the college. It oversees the efforts of the Budget Committee and IEC and reviews the master plans.

More information about the committees and the above mentioned planning models can be found in the notes from first meeting to discuss integrated planning.
Key Recommendations

After sharing information about the master plans and the committee process, participants worked in small groups to discuss two potential campus scenarios. They discussed how the college’s planning processes and master plans could be utilized to assist in resolving the situation. Reports were shared from each small group, followed by a general discussion about the college’s progress in integrating its planning processes.

- **Educational Master Plan**
  - Need to develop an Implementation Plan for the EMP
  - The EMP should inform and lead the FMP and the TMP
  - The EMP needs to be dynamic and reflect the changing needs of students

- **Technology Master Plan and Facilities Master Plan**
  - Incorporate concepts of “life cycle funding,” “multi-year costs” in planning and purchasing
  - Consider diversification of those involved in providing input to the planning process (end users, advisory committee members/experts in the field)
  - Consider human resources planning: impact on staffing, utilizing staff expertise, establishing operating standards

- **Master Plans**
  - Make master plans accessible, easy to use/find information, relevant and dynamic (up-to-date)
  - Cross-involvement for consistent communication
  - “Translate” the master plan information for relevancy in department level planning

- **Institutional Effectiveness and Planning**
  - PIE information should be used to inform master plans
  - Utilize PIE process to enhance departmental collaboration and planning
  - Recognize the impacts that decisions have on other departments/divisions across the campus
  - Utilize multiple perspectives to resolve issues, including cross-team and cross-committee dialog
  - Long term planning and annual evaluations should be based on data that drives decisions, to make improvements, and to clarify direction

- **Communication**
Planning process, including how decisions are made, campus priorities, and urgent situations should be communicated broadly and with transparency.

**Scenario 1**

*The College faces a $750,000 unfunded software predicament. How can we use our master plans and planning processes to solve this problem?*

- Define the scope of the problem
- Identify other existing systems to use instead or reduce funding
- Technology purchases should go through IT. IT can use this information to help in the formation of the TMP
- We all need education on “life cycle funding” — annual and ongoing costs for software and other agreements, licenses, upgrades, etc.
- IT should provide input to the FMP re: alternative funding sources.
- Review the EMP regarding growth
- Recommend better sharing of information from the campus to the Budget Committee or to Fiscal Services for better planning — especially related to “multi-year costs” (licensing, hardware purchases)
- Prioritize – Plan – Be Goal Driven
- Include cost planning in PIE for both multi-year costs and ancillary costs
- Use the PIE process to bring together departments to look at goals, planning and prioritization
- Use department information to obtain an overview to inform the budget process and look at alignment to master plans
- Are our systems too complicated? What are the thresholds?
- How best to use PIE resource requests in our planning process. Need to get more specific details through the budget request process.
- How to capture the PIE items that don’t go through the budget process? We need a better way to capture needs and look at what we want to accomplish.
- If there are existing funds available, the same level of coordination and scrutiny may not exist
- All plans should include alternatives. How do we meet mandates and/or goals with insufficient funds?
- Example: Blackboard.
  - Is it mandated by EMP or goals?
  - Does it do things that are a necessity?
  - Study impacts
  - Look at EMP and FMP with regard to Distance Education
  - How to leverage funding?

**Scenario 2**

*The College faces a monetary shortfall in addressing the new building standards for classrooms still to be built. How would you use the master plans to guide problem solving?*
The need to use processes in unforeseen situations:
- Define the problem and the scope and look at different master plans:
  - What are the different building standards
  - What operating standards are required (e.g., cleaning)
  - Consider life cycle funding to maintain the standards
  - Evaluate future operating expenses
  - Create a comprehensive picture
- The EMP should inform the other plans (right now, we appear to be doing it the other way where FMP informs the EMP)
- Consider limitations due to state building mandates
- Make buildings more versatile
- Need to involve entire campus community, including advisory committees in the planning process
- Need to improve in long term planning and annual evaluations by using data to drive our decisions, to make improvements and to clarify direction
- Incorporate experience of our staff in building plans and operational aspects of buildings in order to minimize mistakes and enhance communication

**Improving what Mt. SAC Does**

**Question 1: Use of Master Plans and Planning**
*What did your group learn about how the planning processes and master plans do or do not work together?*
- The Educational Master Plan (EMP) needs to change and be reviewed frequently for what students need
- The EMP should lead the planning for the college
- Need to utilize a problem-based planning process: using multiple perspectives to resolve issues—cross-team and cross-committee dialog for problem resolution. [Example provided was the moving into new/remodeled buildings and the need to coordinate between division offices, faculty, movers, construction, IT access, signage, etc.]
- Need to recognize the impact of decisions by certain divisions/departments on other divisions/departments—what will happen to them if this particular decision is made
- How to educate the rest of the campus?
- Need to “translate” the master plans for relevancy in department level planning

**Question 2 – Resource Allocation**
*How is resource allocation working with the planning processes and master plans?*
- Problem: lack of resources
• Lacking a formalized process to use in making cuts – no model for “negative resource allocation”

Questions 3 and 4 – Gaps in Structure and Processes
What organizational structures/processes would best solve the two scenarios?
Where are the gaps in how Mt. SAC’s structures/processes operate?

• Life cycle costing – real costs over time
• Master plans aren’t accessible:
  o How to find the information you need
  o How to make the plans dynamic (up-to-date)
• What are the expectations of integrating the master plans for:
  o Committees
  o Departments
  o Constituent groups
• What is the message?
  o Need to be consistent
  o Need to contextualize
  o Utilize Planning for Excellence newsletters
• Capitalize on interest and involvement – need to both take it in but also send it out
• EMP is missing an implementation plan – this aspect needs to be developed
• Involve the leadership of TMP and FMP with EMP. Create annual “yearbook” updates based on recent events/changes
• Own what is working well
• Cross-involvement for consistent communication

Question 5 – Improvements/Suggestions
How can the college improve its integrated planning with its planning models (EMP, FMP, TMP, PIE, and committees)?

• Need planning process to keep all master plans updated
• Consider human resources planning – this appears to be missing:
  o Who will do the work?
  o What are the staffing needs related to the master plans and planning processes?
  o How will we make things work?
• Campus-wide communication system
  o Communication and transparency
  o Funding parameters and restrictions
  o Planning committee work should be shared across the campus to clarify:
    ✓ How decisions are made
    ✓ Urgency of particular situations
• Reaffirm the role of PAC to synthesize and inform
• Enhanced clarity regarding a budget reduction plan – a great way to demonstrate communication and incorporate master plans

Evaluation of the Day
Participants were asked to complete an evaluation of the day. Of the 22 participants, 15 completed the evaluation. The results indicated that overall those participants thought the time together was well spent, the day was worth the effort and should be repeated annually with a broader level of participation, especially from Student Services. A summary of the findings are below.

1. Did you work with your group ahead of time to address the questions for each scenario? Not many teams worked on the scenarios ahead of time. Some people did not remember that requirement being part of the invitation.

| 1. Did you work with your group ahead of time to address the questions for each scenario? |
|----------------------------------|------------------|----------------|
| Valid                           | Frequency       | Percent  |
| Yes                             | 5               | 33.3     |
| No                              | 8               | 53.3     |
| Not applicable                  | 2               | 13.3     |
| Total                           | 15              | 100.0    |
2. Did you like working with your group ahead of time? Of those few that did work with their teams ahead of time, most felt the experience was positive.

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3. What did you like about working with your group ahead of time? The narrative thoughts included:
   - extra set of eyes and expertise
   - made it fun, easy, productive
   - review of material; additional input
   - time to discuss scenarios and possible solutions. Hearing different perspectives and interpretations of the scenarios
   - for some reason, I was not aware of the need to work with my group before hand.

4. What did you not like about working with your group ahead of time? The narrative thoughts included:
   - always difficult to find the time
   - could have had more lead time
   - I think without the benefit of the information presented in the morning, pre-meeting work would not be well grounded.
   - unsure of exact definition or scope of scenarios

5. Did you like working in groups for today’s meeting? Almost all liked working in teams for the day’s activities.

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6. What did you like about working in groups today? The narrative thoughts included:

- a lot of collective good ideas
- ability to gain perspectives from various angles. Comfort of trying out ideas in small group
- discussion of real issues
- diverse perspectives - like a Venn diagram of knowledge; practical scenarios
- diversity of issues, ideas
- good sharing and implementation strategies
- I was identified as an "expert" and was not involved much. Was called upon once. (I appreciated the multi-team perspective. I'm still learning new ways to see and understand)
- interesting to hear ideas
- it gave us a chance to hear differing perspectives about the same issue
- It was very invigorating listening to everyone’s. I also realize how challenging integrated planning is
- learned ? (not readable) how other parts of campus works. It was great b/c we all had ? (unreadable) stuff - background and got different perspective
- learning process
- meeting new people. Hearing a broad perspective on the scenarios. Groups were the perfect size - not too big
- multiple perspectives

7. What did you not like about working in groups today?

- I had a great group that was inclusive of all members
- individuals at this summit either get "it" or have the support to do more so more people should be involved
- insufficient time
• Not really enough time to have a full discussion of the scenarios
• scenarios were a little vague
• time constraints
• was divorced from all communal knowledge

8. Do you think it a worth your time to attend today’s meeting? Most participants thought that the day’s activities did justify the time they put into the meeting.

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9. What would you suggest we do differently next time we offer a group meeting on integrated planning? The narrative thoughts included:
• I thought the meeting was excellent and I learned more about the planning process
• bring in people that are not all committees as well
• need representation from student services and HR and dept chairs; consider expanding it to campus community and do it regularly
- the format seems fine. The scenarios need to lead to goals of the group meeting
- more data
- Widen the circle of awareness of IP efforts; - explore how to make master plans accessible; - explore mechanisms for ongoing communication of planning efforts.
- supply note book to keep track of progress
- continued broad participation
- we need to include more student services folks here. We had only Audrey representing this large area.
- fewer questions

10. **What do you think should be the college’s next steps in reviewing how to improve our integrated planning process?** The narrative included:
   - Communicate, communicate, and communicate!
   - Communication and meet at least twice per year
   - communication via PFE newsletter article to campus about this meeting. Meeting to update plans in light of economic situation
   - continued meetings, broad participation
   - form what is salvageable about the EMP
   - inclusion
   - plan access/communication/relevance of these plans; develop an easy to understand diagram and give real examples of where constituents fit; open venue for campus to engage in conversations about a timely issue (e.g., budget).
   - review plans to adjust to fiscal issues
   - seek dept level up? (unreadable) Ideas - reverse PIE if you will
   - similar workshops/summits offered to campus community
   - this integrated meeting is outstanding - make it regular, annual
   - Use the EMP to drive future planning processes. Make attempts to better communicate to all constituents.
   - Work on "strategic" and "tactical" goals for EMP data collected