INTEGRATED PLANNING:
EFFECTIVENESS AND RECOMMENDATIONS

Introduction

The purpose of the meeting (June 6, 2011) was to bring together members of President’s Advisory Council (PAC) and others across campus to discuss integrated planning – its effectiveness and to make recommendations for actions to improve it. Dr. Virginia Burley began the Integrated Planning day by stating that we must share and understand that planning happens on campus in many areas, at many levels and in many ways. All employees are important to and part of the mosaic of planning that happens at the college. Planning is linked to many areas and to many resource requests. While planning is happening, an evaluation of how it is occurring and a reflection on how to improve it is also happening.

The Integrated Planning day continued with Dr. Burley describing Administrative Policy 3250 (Institutional Planning). A change to the policy was being considered by the college to include assessment of integrated planning. In particular, the new component of the policy reads as follows:

At least twice each year, PAC will convene as an expanded body to assess the effectiveness of integrated planning. The purpose of this periodic assessment is (1) to assess the effective integration of ongoing planning processes, and (2) to make recommendations on integrated planning to the College President. The expanded body shall include members of PAC, plus the following positions/assignments:

1. Members of the President’s Advisory Council (14)
2. Vice President, Instruction
3. Vice President, Student Services
4. Vice President, Administrative Services
5. Vice President, Human Resources
6. Dean, Instructional Services
7. Chief Technology Officer
8. Director, Facilities Planning and Management
9. Director, Assessment and Matriculation
10. Director, Research and Institutional Effectiveness
11. Faculty Outcomes Coordinator (suggested after June 6th meeting)
12. Faculty (Co-)chair of Campus Equity and Diversity Committee
13. Faculty (Co-)chair of Student Equity Committee
14. Faculty (Co-)chair of Assessment and Matriculation Committee
It is this change in the policy that was the impetus to bring this group together. Based on the college’s mission statement and goals, integrated 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 again (i.e., think, plan, do, and evaluate cycle).

Dr. Burley also discussed that one of the key external mandates that impact the college and its work is accreditation. The Accrediting Commission for Community and Junior Colleges (ACCJC) stipulates the standards of the college’s educational programs and services. It is these standards that must be met in order for the college to continue to be accredited and thus offer its students financial aid. Encapsulating the commissions’ 100+ standards into a rubric for planning, below are the key points that the college must achieve to be in the highest category - sustainable continuous quality improvement. It is important for the college to use this rubric (and the standards) to periodically evaluate how well it is doing in these areas.

### ACCJC Rubric on Planning - Sustainable Continuous Quality Improvement

1. The institution uses ongoing and systematic evaluation and planning to refine its key processes and improve student learning.
2. There is dialogue about institutional effectiveness that is ongoing, robust and pervasive; data and analyses are widely distributed and used throughout the institution.
3. There is ongoing review and adaptation of evaluation and planning processes.
4. There is consistent and continuous commitment to improving student learning; and educational effectiveness is a demonstrable priority in all planning structures and processes.

### Summary of Past Integrated Planning Summits

The college has been doing planning since its inception. Its commitment to integrity is evident in many ways including its recent external evaluation in which it received full accreditation from ACCJC. The recent concentrated work on integrated planning began in June 2009. The summit was used to bring together committees that oversaw major planning areas and those persons responsible for major planning endeavors such as the Educational Master Plan, Facilities Master Plan, and the Technology Master Plan. The group evaluated the college’s progress in integrated planning relative to the ACCJC Rubric and found the college to be well into the Proficiency category and in Sustainable Continuous Quality Improvement in some areas. The meeting ended with members having a beginning understanding of the complicated nature of planning and how their work impacts others’ work.

The second Integrated Planning Summit was in October 2009 (). Building on the previous summit, this session focused on having participants use real situations the college was facing and try to find solutions
(e.g., The College faces a $750,000 unfunded software predicament: (1) how can we use our master plans and planning processes to solve this problem; The college faces a monetary shortfall in addressing the new building standards for classrooms still to be built: (1) how would you use the master plans to guide problem solving? During the group work, it soon became clear that a wealth of information was needed in order for participants to make decisions. It also became clear that using integrated planning was multi-faceted. The attendees learned how the master plans work together and how resource allocation works with the master plans. The evaluation of the day indicated a need for regular meetings – thus were born the changes to AP3250. Other recommendations that were addressed included:

- Developed an implementation plan for the Educational Master Plan
- The Educational Master Plan informs and leads the Facilities Master Plan and the Technology Master Plan
- The Educational Master Plan is dynamic and reflects the changing needs of students
- The Technology Master Plan includes life-cycle funding, multi-year costs, allowed for campus-input on its content and examining staffing issue
- Master plans are on the web, used in numerous meetings, used for planning purposes at the department level
- Planning for Institutional Effectiveness is used to inform the master plans and to enhance departmental and cross-departmental collaboration and planning
- Long-term and short-term planning are based on data that drives decisions
- Planning process, including how decisions are made, campus priorities, and urgent situations are communicated broadly and with transparency

**Current Planning Challenges and Responsiveness**

The meeting continued with a presentation by Dr. Terri Long. Dr. Long provided a summary of the work the college has done to provide a plan of action based on the Educational Master Plan (EMP). The four EMP meetings, with highly engaged employees from all teams, culminated in the creation of a prioritized listing of actions needed. It was clear that the EMP was created when growth was a reality, but it became not as useful as economizing was the norm. As such, the groups worked many hours to make the action plan a meaningful document for their flexible current and future needs. The three primary goals of their activities were:

- To coordinate the efforts of all individuals working with students to maximize resources
- To support greater student success
- To support strategies to increase student access to classes and services

During these sessions, they created sub-goals under the three primary goals. Each sub-goal had identified tasks that were classified into short-term, long-term or ongoing and progress toward meeting each task was updated at the last meeting.

Dr. Long also gave an overview of the Basic Skills Coordinating Committee’s (BSCC) work which is to provide oversight and coordination of campus-wide efforts to strengthen and improve the delivery of basic skills instruction and services for students. She discussed how well this work aligns with the Educational Master Plan. As with all areas across campus, basic skills funding is being decreased (by 30-50%). As fewer projects could be funded, the evaluation process was augmented to include a more detailed examination of how each project provided direct impact on large or small numbers of students.
Dr. Audrey Yamagata-Noji provided an overview of the integrated planning dilemmas in Student Services in a time of reduced resources. Overall, it was clear that Student Services had endured severe cuts in services over the last few years. Their response has been to regroup, refocus, and repurpose. For example, due to a 50% loss of funding, DSPS is experimenting with offering set dates and times for test proctoring to reduce the number of individual testing and proctoring sessions held daily. Also due to a severe loss of funding, EOPS had to make the difficult decision to discontinue its peer advising but to retain critical counseling and tutoring services.

The attendees discussed how they are supporting planning as the college moves toward improvement. They were asked to work in groups to answer this question: “How does the reduction in money and resources for the college impact your planning processes? Use the ACCJC Rubric on planning to guide your discussions.” Overall, it was clear from the discussions that people were cognizant of re-working their resource needs to be more efficient with least impact on students and that there was a need to stop doing everything that they’d always done (increase efficiencies). Although there is a planning component in their departments, a reactionary piece is also evident as well as some creativity (e.g., going to grants, other funding sources) and strategic thinking. There was a balancing of impact of services with decreased expectations due to reduced funding (e.g., balance between quality and resources). It is clear that there is complex and costly funding needed to educate students (e.g., facilities, support services, changes in pedagogy, etc.).

Working in groups, members evaluated the strategic objectives within the college’s Strategic Plan. Questions addressed included:

- Are more objectives needed?
- How does Strategic Planning relate to integrated planning?

The group thought that it would be helpful to have the President’s strategic objective on partnerships increased: The President will expand outreach to Businesses and Industry so as to establish strategic partnerships (under college goal #4). Another new objective is as follows: IT will complete the backlog of Argos reports by fall 2013 (under college goal #5). Under college goal #9, a new objective might be: “By January 2012, Administrative Services will research and evaluate the feasibility of using existing resources in lieu of contracting out services.

At the end of the day, Dr. John Nixon discussed the complexity of integrated planning and how it is important for all employees to keep a keen eye on evaluating planning and improving it. Based on the groups’ evaluation of this summit and past work in the two previous summits, recommended actions for this group for fall 2011 include the following:

- Provide more opportunities for the group to grade the college’s endeavors to allow for the specific outcome asked of the group: to assess the effective integration of ongoing planning processes and (2) to make recommendations on integrated planning to the College President.
  - Provide the agenda and handouts ahead of time.
  - Provide a learning opportunity at each meeting and use that learning as the basis for the activities and the assessment and recommendations for improvement.
  - Based on the information gleamed from these three summits as well as the recommendations for improvement, use the following as a check-point for demonstrating how integrated planning works and allow for the group to provide recommendations for improvement:
    - How is the college’s implementation plan for the Educational Master Plan going?
Demonstrate how the Educational Master Plan is dynamic and reflects the changing needs of students. Recommendations for improvement?

Demonstrate how the Educational Master Plan informs and leads the Facilities Master Plan and the Technology Master Plan. Recommendations for improvement?

Demonstrate how the Technology Master Plan includes life-cycle funding, multi-year costs, allowed for campus-input on its content and examining staffing issue. Recommendations for improvement?

How are master plans documented on the web, used in numerous meetings, used for planning purposes at the department level? Recommendations for improvement?

Demonstrate how Planning for Institutional Effectiveness (PIE) is used to inform the master plans and to enhance departmental and cross-departmental collaboration and planning. Recommendations for improvement?

Demonstrate how long-term and short-term planning are based on data that drives decisions. Recommendations for improvement?

How are planning process, including how decisions are made, campus priorities, and urgent situations communicated broadly and with transparency? Recommendations for improvement?

How can the college do integrated planning differently to be more effective?

How does the Student Success Workshop findings relate to the master plans?

How do we integrate the research with the planning process?

Use a thematic approach for each meeting (e.g., how the master plans are linked).

30 minutes should be allocated for each activity followed by 10 minutes for reporting out.

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**Attendees**

1. Adrienne Price, Director, Grants
2. Annette Loria, Vice President Human Resources
3. Audrey Yamagata-Noji, Vice President Student Services
4. Barbara Gonzales, Professor, Learning Assistance Reading
5. Barbara McNeice-Stallard, Director, Research & Institutional Effectiveness
6. Bill Rawlings Computer Facilities Supervisor, Information Technology
7. Dale Vickers, Director Academic Technology & Infrastructure, Information Technology
8. Deb Distante, Bibliographic Instruction Librarian, Library
9. Diana Casteel, Executive Assistant, President’s Office
10. Eric Kaljumagi, Professor, Learning Assistance
11. Gary Nellesen, Director, Facilities Planning & Management
12. Heidi Lockhart, Director, Career and Placement Services
13. Jim Ocampo, Director, Assessment and Matriculation
14. John Nixon, CEO/President
15. Juan Astorga, Director, TRIO Programs
16. Juan (Johnny) Jauregui, Landscape Technician, Grounds
17. Kristina Allende, Professor English
18. Rosa Asencio, Secretary, Career and Transfer Services
19. Terri Long, Dean, Instructional Services
20. Victor Belinski, Chief Technology Officer, Information Technology
21. Virginia Burley, Vice President Instruction

**Regrets**

1. Gary Enke, Professor, English
2. Laura Martinez, Secretary, Professional and Organizational Development
3. Liesel Reinhart, Professor, Communication
4. Melinda Bowen, Professor, Physical Education
Evaluation
At the end of the day, attendees were asked to evaluate their experience. Most found the experience to be worthwhile (88.9%). While they appreciated the time together and liked learning about some of the planning endeavors and some wanted more learning opportunities, there was a clear need to also address the “recommendation” piece of the meeting. Some did not feel that the group made many if any recommendations for improvement in the integrated planning process. Many said that they would like to have more meetings more often. Below are the comments from the attendees.

Do you think it worth your time to attend today’s meeting?

- 88.9% (n=16) Yes
- 0% No
- 11.1 (n=2) May be

Why?

Yes Comments:
- It is always good to hear what others are doing on campus
- These kinds of meetings help pull us together
- Bringing representatives from various areas provides this framework for this integration
- Provided a clearer understanding of how all the planning units are integrated
- Communicating ideas and understanding is valuable
- Helpful to understanding various planning functions across the college and how they relate/align with the strategic plan
- It gave us an opportunity to share perspectives and experiences on a specific subject
- To bring all constituents together
- Good discussion related to strategic goals and current budget crisis
- It was helpful to be able to review how we plan and how we organize goals and objectives
- It is always good to meet with other councils/leaders involved in planning and discuss the conditions impacting our ability to do our jobs.
- I feel like I have a much better idea of how planning is actually going on around campus. Really found the strategic objectives informative. The small group activity was very helpful and it was good to discuss things with others
- I was able to communicate to many of the leaders on campus about the planning efforts taking place in facilities management.
- I was able to hear from campus leaders about their planning efforts
- I was able to see new ways to work together on our planning efforts
- Very good conversation and sharing of innovative ideas

May Be Comments:
- I thought we were grouped to be asked our opinion of what the college could be doing differently in terms of integrated planning. Not just an update on what’s been done.
- Always good to come together to review where we’re at. However, not enough focus on what more we need to do or how to get there – “What’s next?”

What would you suggest we do differently next time we offer a group meeting on integrated planning?

- Ensure that there is a balance in terms of constituency representation or at least attempt to ensure
- Group introduction would be helpful
- Maybe provide the handouts ahead of time to be able to have us read the information so we can know what is being discussed
We should try to encourage more dialogue beyond budget cuts
Need to look forward – updates are good, but where is the future planning? How do we integrate what departments do (e.g., PIE), what committees do (e.g., goals), what information/data/research is available to departments and committees?
Spend time with other groups
No suggestions at this time – Ginny did a great job of facilitation
More time; additional structured group activities (about 30 minutes more)
I felt the activities were a bit nebulous and not very meaningful, so have better activities/questions
To some extent, we had inadequate representation. There was little union or faculty representation, and only two groups presented. As few people read all the plans, hearing a 15 minutes presentation on each plan would be valuable.
Perhaps earlier in the year so more key people attend. Forcing the different constituent groups (e.g., classified, management, committees) to sit with others for discussion portion
The time went far too quickly. It would have been nice to have an agenda beforehand or a better idea of what we were going to do beforehand, especially if there are documents (Strategic Plan) to review
Perhaps more time for reports. I would like to have made a report on facilities
Perhaps more time for discussion on existing planning processes and strategic objectives
May be a thematic view for each meeting (e.g., Master Plans; Link between plans; Integrate Planning in Action; etc.)

What do you think should be the college’s next steps in reviewing how to improve our integrated planning process?

- Bring together various planning pieces as opposed to each piece standing alone
- Tie together work from the Educational Master Planning meetings and the Student Success Conference. The focus from these two efforts area clearer and more current and may help to guide a more integrated planning effort
- Evaluate last meeting and talk about improving
- Increase frequency of meetings to stay on track
- Meet quarterly
- Discuss our approach at the next meeting to see if it (or how it) can be improved (interest-based brainstorming; “great staff” style solution building)
- Meeting more often – encourage more participation
- Modify/classify goals as achievable; required resources/funding
- The college should review who is best needed for planning and should provide training so that they are well educated and able to contribute
- Just hold consistent meetings and communicate well with campus community
- It would be nice to go through the processes by which the various master plans are created, evaluated, and revised and actually have the opportunity to review them and provide feedback or suggestions
- More frequent meetings
- Schedule another planning summit