INTEGRATED PLANNING:
PULLING THE PLANS TOGETHER

Introduction

The purpose of the meeting (November 2, 2011) was to bring together members of President’s Advisory Council (PAC) and others across campus (per Administrative Policy 3250 – Expanded PAC) to discuss integrated planning – its effectiveness and to make recommendations for actions to improve it. Dr. Bill Scroggins gave welcoming remarks and a brief overview of the Integrated Planning meeting by sharing his perspective on planning and how planning needs to be integrated to improve institutional effectiveness. He asked members of the audience for specific examples of how their work integrated with others across campus, what was in their plan and how they managed their plan.

Next, Ms. Liesel Reinhart and Ms. Heidi Lockhart lead the group in an exercise. Each participant was asked to write on the cards at their table. For each planning process (e.g., Planning for Institutional Effectiveness (PIE), Educational Master Plan, Facilitates Master Plan, Matriculation Plan, Equal Employment Opportunity Plan) they were a part of they were to write its name on a card. One person from each table was asked to report out on the group’s cards and to place the cards on a bulletin board such that those plans having broader impact on the college would be at the top of the bulletin board and those with a lower impact to be placed at the bottom. At the conclusion of the exercise, it was clear that there were many people in the room who were involved in many planning endeavors and that some ideas on the board were not yet plans, but could certainly be made into plans with further work. The exercise progressed with the group directing how the many plans are connected to each other or influenced by each other by using multiple long pieces of yarn. The final result was a labyrinth of different colored yarns of wool connecting plans (see picture of Eric Kaljumagi admiring the finished product). With all the plans on the board, Dr. Scroggins discussed how one plan should influence another plan (e.g., some of the Educational Master Plan’s objectives should be contained in the Strategic Plan).

Dr. Scroggins proposed that the use of integrated planning helps to determine the impact of the college’s work and to determine whether it is achieving its goal (i.e., institutional effectiveness). The re-focusing of the college’s Strategic Plan to be directed by the college’s many other planning endeavors is the goal. He discussed the form of the plan (i.e., template, its architecture, and the maintenance and evaluation of it). The mission drives all that we do at the college and the vision and core values also play a key role. It is important to consider the degree to which what we do is aligned with the college’s
mission (see Planning Cycle Diagram from Bill). Also important is the purpose of the plan and how the college’s goals (i.e., permanent areas of endeavor usually not ever fully achievable) are aligned with it all. Connected with goals are objectives – that are measurable, that drive the development of activities, and that can be accomplished. In order to accomplish all measurable objectives, each with an appropriate metric, there must be concrete activities with assigned persons responsible for its completion. The theme of alignment was clear in the President’s message. Anything out of alignment needs to be re-evaluated for its fit to the college’s operations and mission.

The use of metrics is not always strong across campus. When Dr. Scroggins asked various members of the group about specific processes (e.g., faculty hiring), while they understood the current process, the reasons behind them and the data connected to them were not always well understood. It is this connection to metrics that Dr. Scroggins would like to encourage the college to embrace. Some may see measurement or metrics as static, but metrics are also dynamic depending on the needs of the institution. For example, when setting a 10-year plan, while the metrics start off static, as the years progress and the plan evolves, it becomes necessary to shift the metrics as needed. In any good planning, there is also the need to balance the short-term and long-term planning perspectives to ensure that what is needed to be done is being done.
Ms. Barbara McNeice-Stallard followed-up to Dr. Scroggins’ discussions by having the group review a handout of the College of the Sequoias’ Strategic Plan. The structure of the plan is very similar to what Dr. Scroggins discussed as a typical and robust Strategic Planning model. Attendees called out how one section of the plan related to the activity that Ms. Reinhart and Ms. Lockhart had the group do with regarding to linking all the plans across campus. The group found the document of assistance as it helped to reinforce Dr. Scroggins’ discussion of the principles of good planning and provided some further depth to the conversation. For example, while the measurable outcomes in the College of the Sequoias’ Plan did seem to be easily measurable, one member of the group noted that the formulation of a plan, as one measurable outcome, didn’t seem measurable in an authentic manner. Dr. Scroggins noted that sometimes strong metrics or measures are not always possible with some areas and/or in beginning work in an area. The college should strive for vigorous metrics, but also be reasonable in what it is asking of the departments.

Dr. Burley discussed how the Institutional Effectiveness Committee (IEC) oversees the PIE process (the college’s program review process). As part of meeting the goal of integrated planning, IEC has met with the Budget committee a few times in the last few years to discuss the connection and alignment of PIE to the Budget process. The next release of PIE will include a strong notation that requests that resources should be based on department planning when at all reasonable. This month, IEC will meet with the Outcomes Committee to discuss how outcomes assessment is being done within PIE and how each committee can help with the outcomes process across campus.

To consider the idea of connecting focused plans systematically with PIE, Dr. Burley suggested possibilities for rethinking the structure and format of PIE to both achieve a more dynamic goal setting process and bring in the report from groups who maintain plans across the colleges. The President proposed that a meeting be set that would allow all college employees to review how their work is being categorized and to recommend new focused areas as well as to recommend specific objectives for each focused area. At least one member of the group agreed that it was important to honor the work of the departments and using PIE in this manner would do just that. The summary activity that IEC performs annually could be the vehicle for updating the strategic plan. The draft document that Dr. Burley circulated was recognized by the group as having the potential to serve as this integrating tool. Committees who update Focused Plans (Technology, Basic Skills, etc.) would need to have their annually revised objectives included in this IEC summary process. Charrettes may also be used to gather input (i.e., focused situations where groups are asked to suggest possible solutions). Members from the communities in the Mt. SAC District and Mt. SAC students would also be included in the review process in some manner.

In the end, the group agreed that the college’s plans should be integrated, should inform each other, and should note their impact in a yearly format through the evaluation of the objectives found in the proposed new Mt. SAC Strategic Plan and an evaluation of the whole planning process. PAC will provide the leadership for this work. IEC will provide the workflow and summaries for PAC’s review.

**Evaluation**

At the end of the day, instead of handing out a survey, attendees were asked if they felt that their time was well spent at this event. Almost all raised their hands. When asked if they now had a clear idea of about a Strategic Plan, only one person raised their hand. The group said that while they recognized all the elements in a Strategic Plan, they were still unclear on how it was put together, used, and evaluated.
After the meeting, others indicated that it would be better to have a three-hour meeting as there was so much to understand.

The following are next meeting suggestions/ideas based on both today’s meeting outcomes and proposals from members of the group as well as previous Integrated Planning Summit recommendations:

- Use a 4 hour time block
- Continue to provide the agenda ahead of time
- Provide a primer on planning and integrated planning as a short introduction and show how plans influence one another and work together
- Create a flowchart of Planning Processes and note where issues are that we need to fix
- Provide an opportunity for 1-2 plans to be reviewed and discussed & demonstrate how they are used for decision making
- Ask the group to review a list of the master plans and who is responsible for each
- Start the discussions about how the plans overlap with a goal toward the college finding the gaps and determining how they should be addressed
- Provide an update on and evaluation of the suggested activities for formulating a new Strategic Plan

**Attendees**

1. Adrienne Price, Director, Grants
2. Alex Mendoza, Student
3. Arturo Morales, Lead Painter, Maintenance
4. Barbara Gonzales, Professor, Learning Assistance Reading
5. Barbara McNeice-Stallard, Director, Research & Institutional Effectiveness
6. Bill Rawlings Computer Facilities Supervisor, Information Technology
7. Bill Scroggins, President/CEO
8. Chase Relock, Student
9. Deb Distante, Bibliographic Instruction Librarian, Library
10. Diana Casteel, Executive Assistant, President’s Office
11. Eric Kaljumagi, Professor, Learning Assistance
12. Gary Nellesen, Director, Facilities Planning & Management
13. Glenda Bro, Professor, American Languages
14. Heidi Lockhart, Director, Career and Transfer Services
15. Jason Chevalier, Professor, Music
16. Jim Ocampo, Director, Assessment and Matriculation
17. Juan (Johnny) Jauregui, Landscape Technician, Grounds
18. Karen Saldana, Director, Risk Management
19. Kenneth Baca, Student
20. Laura Martinez, Secretary, Professional and Organizational Development
21. Liesel Reinhart, Professor, Communication
22. Luisa Howell, Professor, Foreign Languages
23. Mark Fernandez, Web Support Specialist, Information Technology
24. Melinda Bowen, Professor, Physical Education
25. Marchelle Nairne-Proulx, Secretary, ESL
26. Patricia Crildland, Professor, Older Adult Program
27. Phil Maynard, Professor, Communication
28. Richard McGowan, Professor, Continuing Education
29. Terri Long, Dean, Instructional Services
30. Victor Belinski, Chief Technology Officer, Information Technology
31. Virgilio Doniza, Student
32. Virginia Burley, Vice President Instruction
Regrets
1. Jennifer Galbraith, Professor, Mathematics
2. Michael Gregoryk, Vice President Administrative Services
3. Hugh Griffith, Professor, Mathematics
4. Annette Loria, Vice President Human Resources
5. Audrey Yamagata-Noji, Vice President Student Services

Resources
The following are some resources to consider when gathering a further understanding of planning and what the college has done in this area. For example, an introduction to integrated planning is available online. 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).

Past planning summits can be found at the following links: (1) June 2009 meeting, (2) October 2009 meeting, and the (3) June 2011 meeting.

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 in planning 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.