

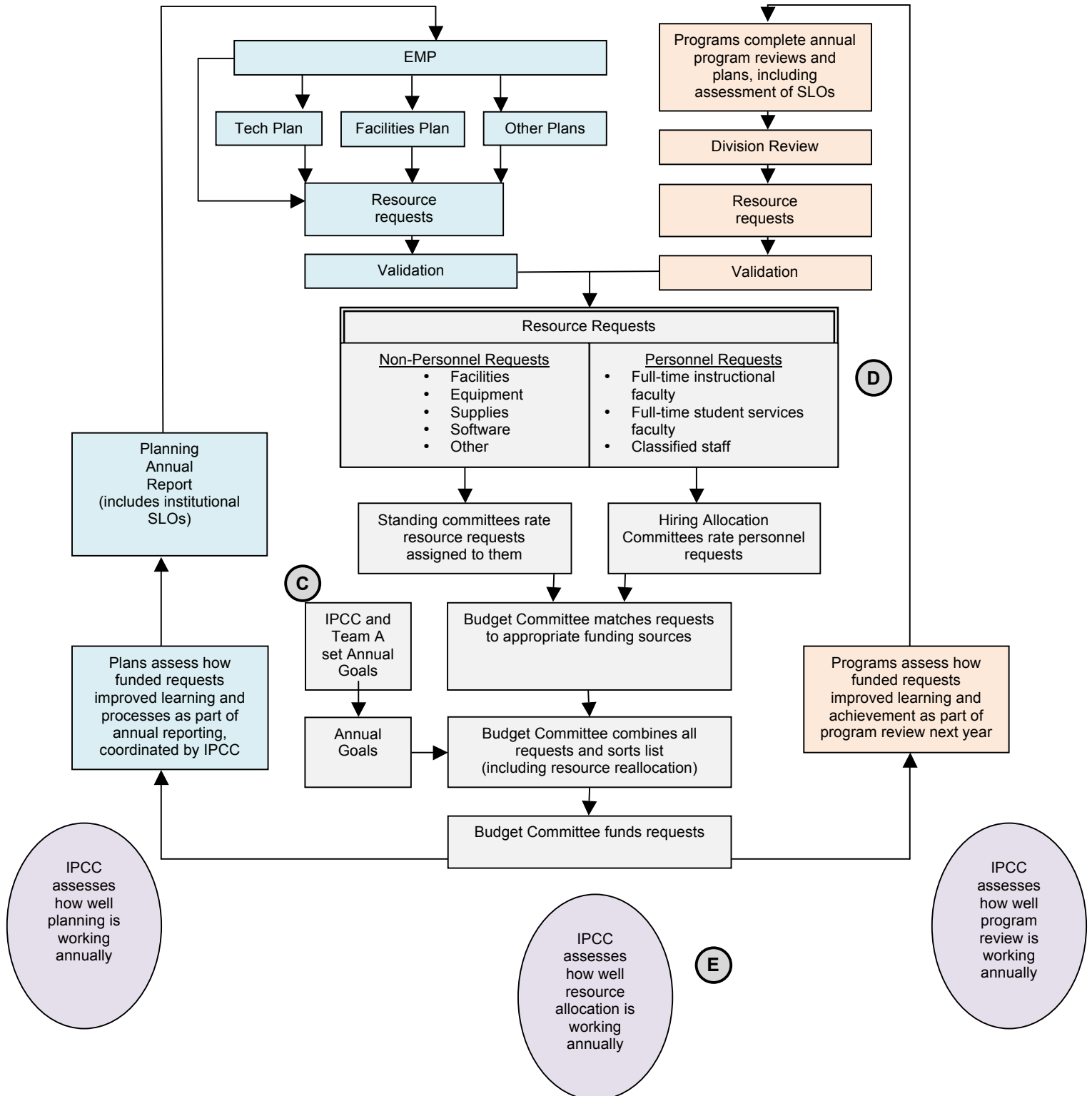
Integrated Planning, Program Review, and Resource Allocation

(A)

Track A. Resource allocation from plans

(B)

Track B. Resource allocation from programs



The planning, evaluation, and resource allocation process begins with two parallel tracks. Track A involves resource allocation from existing plans. Track B involves resource allocation from programs. Resource allocation requests from both tracks funnel into one mechanism for handling requests.

Resource requests in either Track A or Track B fall into the following categories:

Personnel Requests

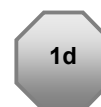
- Requests for new/replacement full-time instructional faculty
- Requests for new/replacement full-time student services faculty
- Requests for new/replacement classified staff

Non-Personnel Requests

- Requests for new facilities
- Requests for remodeling of existing facilities
- Requests for new equipment/computers (including total cost of ownership)
- Requests for supplies
- Requests for software (including future licensing fees)
- Other requests

A Track A: Resource Allocation from Plans

The table below shows the college plans that may make requests through the resource allocation process each year. Each plan has an administrative responsibility assigned, but it is expected that the administrator will work with faculty, staff, and appropriate committees when deciding what resource requests to submit from the plan.



Plan	Responsible Administrator
Educational Master Plan/Strategic Plan	Vice President, Instructional Services
Technology Plan	Associate Vice President, Information and Technology Services
Facilities Master Plan	Executive Vice President, Administrative Services
Distance Education Plan	Associate Dean, Instructional Technology
Instructional Technology Plan	Associate Dean, Instructional Technology
Cultural Diversity Plan	
Student Services Master Plan	Vice President, Student Services
Credit Matriculation Plan	Dean, Student Services
Noncredit Matriculation Plan	Associate Vice President, Continuing and Community Education
Library and Learning Resources Plan	Program Manager, Library and Learning Resources
Disaster Recovery Plan	Associate Vice President, Information and Technology Services
Health and Safety Plan	
Facilities Maintenance Plan	Director, Facilities
Human Resources Plan	Associate Vice President, Human Resources
Staff Development Plan	Associate Vice President, Human Resources

Resource requests must be tied to specific plan goals. Requests must be submitted by a specific date each year for possible funding in the next fiscal year.

Resource requests from plans are validated (by a subcommittee of the IPCC?). Validation involves the evaluation of the request in relation to the stated goals of the plan, as well as to EMP goals and institutional SLOs (core competencies). Only requests found to be valid are passed on to the next step of the process (see “Resource Request Pool” below).

B Track B: Resource Allocation from Programs

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Instructional, student services, and administrative services programs and offices may request resources each year through program review. All units, as defined by the Program Review Committee, are required to conduct program review annually. Program review focuses on student achievement, student learning outcomes, and program planning. The program review document is streamlined to include less narrative than in the past.

Instructional program review includes the assessment of course-level and program-level SLOACs. Student services program review also includes assessment of SLOACs. As part of program review, programs summarize assessment findings at the course and program levels, show how program improvements have been made in response to SLO assessments, evaluate how effective past activities have been in improving student achievement and learning, and link resource allocation requests to program needs and student learning.

Instructional divisions with more than one program should review program reviews, including plans and resource requests, for all their programs. This division-level review may result in the elimination of some resource requests.

Validation of requests from program review focus on the match between program plans, achievement and learning outcomes data, and EMP goals. Only validated resource requests are passed on to the next step of the process (see "Resource Request Pool" below).

C Annual Goals

Annual Goals are priorities that the college sets each year to address urgent needs that might not be addressed through established plans or program review/program planning. Annual Goals allow flexibility in resource allocation. Institutional priorities (e.g., technology replacement) can be defined in the Annual Goal process in order to increase their priority in resource allocation.

Annual Goals are proposed by the IPCC and prioritized by Team A in the Fall semester each year. They are used by the Budget Committee in its final prioritization of resource requests in the Spring semester each year. The Budget Committee evaluates whether each resource request addresses an Annual Goal and uses that information in making decisions about prioritization.

D Resource Request Pool

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Requests from plans and from program reviews are submitted to a pool of all requests for a given fiscal year. Requests are divided into two types: personnel requests and non-personnel requests. The mechanisms for prioritizing personnel and non-personnel requests are different.

Non-personnel requests are all treated and prioritized together. Instead of prioritizing requests depending on their type and funding source (e.g., instructional equipment), one process is used for all non-personnel requests. Non-personnel requests are prioritized by the appropriate standing committees. Requests involving instructional programs are prioritized by Academic Affairs. Requests involving student services programs are prioritized by Student Affairs. Requests involving administrative services programs are prioritized by Administrative Affairs. Requests involving computer equipment and software are prioritized by the Campuswide Computer Coordinating Committee.

Personnel requests are prioritized by the hiring allocation committees: IHAC, SSHAC, and CSHAC.

After prioritization by the standing committees and the hiring allocation committees, requests are submitted to the Budget Committee. The Budget Committee matches resource requests with appropriate funding sources (e.g., instructional equipment, lottery, etc.). The Budget Committee decides on the final prioritization of all the requests for the next fiscal year. [What about Perkins funding, basic skills, categorical funding, etc.?)

The Budget Committee also reviews funding for reallocation, instead of allocating only new funding. [Should this be done by continuing the task force that looked at non-personnel accounts over \$10,000?]

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The IPCC is responsible for evaluating the effectiveness of the integrated planning process. The IPCC evaluates how well resource allocation, planning, and program review are working. The IPCC develops specific measures of effectiveness (performance indicators) for resource allocation, planning, and program review. Evaluation is conducted every year.

Evaluation of Program Review

The IPCC evaluates program review annually. Measures of program review's effectiveness include:

- Percent of programs completing program reviews
- Percent of resource requests from program reviews that are validated and considered in resource allocation
- Percent of programs using student learning outcomes assessments for program improvement
- Percent of programs listing specific program improvements in their program review documents
- Program Review Committee assessment narrative

Evaluation of Planning

The IPCC evaluates the Educational Master Planning process annually. Measures of the effectiveness of the EMP process include:

- Percent of EMP action items scheduled to be completed during year that were completed
- Percent of EMP action items with assigned timelines
- Percent of EMP action items with assigned outcome measures
- Percent of standing committee agendas referencing EMP action items
- Team B assessment narrative

Individual college plans are also evaluated. Each plan undergoes self-evaluation annually. The IPCC synthesizes institutional plan evaluations into a planning annual report, which also includes assessment of institutional SLOs.

Evaluation of Resource Allocation

The IPCC evaluates integrated planning annually. Measures of the effectiveness of resource allocation include:

- Percent of requests successfully funded
- Comparison of funded requests and prioritized list
- Budget Committee assessment narrative

Evaluation of Institutional Effectiveness

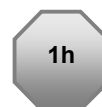
In addition to evaluation of processes, the IPCC and the Research & Planning Office report annually on institutional effectiveness. Measures of institutional effectiveness include:

- College transfer rate
- Collegewide course success rate
- Course success rate for CTE courses
- Course success rate for basic skills courses
- Collegewide student persistence rate
- Student Progress and Achievement rate
- Percent of credit students earning at least 30 units
- ESL improvement rate
- Basic skills improvement rate
- CDCP progress and achievement rate
- CTE technical skill attainment rate
- CTE completion rate

- CTE persistence rate
- CTE employment rate

Major Process Questions

- Who will validate requests from plans?
- Who will validate requests from program review? [refer to Program Review Committee]
- Will Perkins funding, categorical funding, basic skills funding, Senate PFE grants, staff development funding, etc. go through the same process? What about released time positions?
- Should Campus Development prioritize requests facilities requests?
- How will budget reallocation/reprioritization be build into the system?
- How will this new system be communicated to all constituencies?



Implementation Timelines



Timeline and Outcomes for Implementing Integrated Planning

Activity	Primary Responsibility	Outcomes	Completion Date
Design integrated planning model that includes planning, program review, and resource allocation and strengthens linkages	IPCC	Model completed	Summer 2010
Define evaluation process and measures for planning, program review, and resource allocation	IPCC	- Process defined - Measures identified	Summer 2010
Approve integrated planning model through governance process	IPCC, Campus Executive Committee	Model approved	Fall 2010
Pilot test annual program review that includes student learning outcomes, student achievement measures, program planning, and resource requests	Program Review Committee	7 programs (3 instructional, 2 student services, 2 admin services) complete revised program review	Fall 2010
Pilot test validation process for program resource requests	Program Review Committee	All resource requests from program review are filtered by program review validation	Fall 2010
Pilot test validation process for resource requests from plans	IPCC	All resource requests from plans are filtered by validation	Fall 2010
Implement integrated resource allocation process for resource requests for 2011-2012	Budget Committee	All resource requests undergo prioritization as defined in new model	Spring 2011
Fully implement annual program review for all instructional, student services, and administrative services programs	Program Review Committee	All programs complete annual program reviews	Fall 2011
Fully implement validation processes	Program Review Committee, IPCC	- All resource requests go through validation process 50% of resource requests are linked to Educational Master Plan	Spring 2012
Fully implement full integrated planning model	IPCC		Spring 2012
Fully implement evaluation of full integrated planning model	IPCC		Spring 2013

Annual Timeline for Integrated Planning

Date	Activity
October	All programs complete program reviews, including plans and resource requests
October	Leaders in charge of individual plans develop resource requests tied to plans
October	Annual Goals set
November	Resource requests go through division review
February	Resource requests validated
March	Resource requests go to standing committees
April	Standing committees and hiring allocation committees prioritize resource requests
May	Prioritized resource requests go to Budget Committee
June	Expanded Budget Committee establishes final prioritized list of resource requests
June	Tentative Budget is adopted
July	IPCC develops Planning Annual Report
July	IPCC evaluates program review, planning, and resource allocation and recommends changes for following year