

Ventura County Community College District

INTEGRATED
PLANNING MANUAL

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I. INTRODUCTION

The *Ventura County Community College District Integrated Planning Manual* is a guide to integrated institutional planning at the District level. It delineates the cyclical planning process that flows from **Mission, Planning, Resource Allocation**, to **Assessment and Program Improvement**. The Manual identifies how these elements link and function within the cycle, how the District and the community participate in District wide planning, and what major planning documents and activities result from the process.

The VCCCD integrated planning model provides the overarching framework for District level planning. This District level planning defines the broad parameters for local planning at the three constituent Colleges and District Services. The Manual begins with an overview of the VCCCD integrated planning model, accompanied by a description of each component under the model and the implementation timeline. Following this overview, the local planning process for each constituent College and District Services are outlined.

Linkages between District level planning and local site planning are established on three levels:

- The Mission of the District prescribes the general parameters for the establishment of the College Mission
- Board Goals of the *Educational Master Plan* and the Strategic Objectives of the *Strategic Plan* provide direction for the annual planning at the College and District Services. The Colleges and District Services craft specific action plans based on the Strategic Objectives that fulfills the Board Goals of the District.
- Annual review results at the Colleges and in District Services are presented collectively at the District level during the Board of Trustees Annual Planning Session using the District Effectiveness Report. The report presents data that address a number of indicators tied to the review of progress for Board goals. These include student success, operational efficiency, and financial health.

The *VCCCD Integrated Planning Manual* is reviewed and updated annually to document changes and improvements in planning elements, including documents, processes, and timelines. The review is conducted by Consultation Council or its subcommittee. The results of the review are reported to the Board of Trustees at its Annual Planning Session in June.

Through the linkages of District and local College/District Services planning and assessment, and through a regular cyclical review of the planning process, VCCCD ensures that the planning is aligned with the mission at all levels, and all Colleges and District Services engage in a cycle of continuous quality improvement to support student success.

II. PLANNING

II.A. DISTRICT LEVEL PLANNING

The District Level Integrated Planning Model comprises a number of key elements, linked by timelines into a cycle of Mission Review, Planning, Resource Allocation, Assessment, and Program Improvement. The repeated implementation of the planning cycle over time results in Continuous Quality Improvement and a demonstration of institutional effectiveness.

Planning Cycle

The Cycle of District Integrated Planning Model occurs over six years. The calendar below outlines the current status in the implementation of the cycle.

Academic Year	Cycle	Plan Activities	Assessment
2012-13	Transition from prior year plan; initiation of new planning cycle	Transition: Complete Original Planning Cycle; Conduct Master Planning: Create Master Plan with Goals	Assess and improve planning process
2013-14	Current Cycle: Year One	Create Strategic Plan containing Strategic Objectives to support Master Plan Goals; develop and implement Action Steps	Access Progress on Objectives; Assess and improve planning process
2014-15	Current Cycle: Year Two	Assess status of Strategic Plan and Objectives; continue implementation of Action Steps	Assess and improve planning process
2015-16	Current Cycle: Year Three	Mid-term Review of Master Plan Goals: Assess status of Master Plan Goals, Strategic Plan and Objectives; adjust Strategic Plan and Objectives as needed	Assess and improve planning process
2016-17	Current Cycle: Year Four	Assess status of Strategic Plan and Objectives; continue implementation of Action Steps	Assess and improve planning process
2017-18	Current Cycle: Year Five	Assess status of Strategic Plan and Objectives; continue implementation of Action Steps	Assess and improve planning process
2018-19	Current Cycle: Year Six	Master Planning Year: Assess and modify Master Plan for the next 6-year cycle	Assess and improve planning process

The VCCCD Mission

Ventura County Community College District provides students, in its diverse community, with access to comprehensive quality educational opportunities that support student learning and student success.

Educational Master Plan

The major planning document that emerges from the VCCCD Integrated Planning process is the *VCCCD Educational Master Plan*. The standard elements of the *Educational Master Plan* include:

Research and Data Analysis

Research and data analysis provide information for District wide dialogue that shapes the assumptions of the *Educational Master Plan*. Annual and trend data are collected and analyzed in a number of areas, including:

- Demographic data and projections
- Economic projections
- Student access and enrollment data from feeder institutions and receiving institutions
- Student access and success data from the District Colleges
- Long- and short-term analysis of community needs as appropriate to mission
- Other sources of data identified as essential in the planning dialogue

Challenges, Opportunities and Board Goals

Analysis of the data and subsequent dialogue with a broad range of constituencies leads to the identification of long-term and broad Challenges and Opportunities for VCCCD. Based on these Challenges and Opportunities, the Board of Trustees formulates a set of Board Goals to guide the work of the Colleges over the six-year planning cycle.

Companion Plans to the Educational Master Plan

As part of the integrated planning process, companion District Master Plans are created to support planning in major operational areas. The writing of the *VCCCD Technology Master Plan* and the *VCCCD Facilities Master Plan* are guided by the parameters of the *Educational Master Plan*. The companion plans are updated regularly by the District Services areas and appropriate participatory governance constituencies.

Strategic Plan

To guide the implementation of the Board Goals, Strategic Objectives are created for each Board Goal through broad and consultative dialogue, and documented in the *VCCCD Strategic Plan*. The *Strategic Plan* will be on a three year review cycle and contains minimally the following:

- The Strategic Objectives with linkage to the Board Goals
- An implementation grid with Action Steps, Responsible Parties, and Timeline Assessment

Consultation Council, under the direction of the Chancellor, is responsible for District wide planning. It is the participatory governance committee that charges the appropriate groups to develop Action Steps, and receives reports of progress as the implementation cycle is completed.

This is a sample of the Strategic Plan Implementation Grid:

Implementation Plan 2012-2013

Board Goals: 1) Access and Success; 2) Quality within Budgetary Limits; 3) Prudent Fiscal Stewardship

Board Goal 1: Provide Access and Student Success

Strategic Objective 1-A: Establish a District wide General Education subcommittee to develop ideas to improve commonality among courses at each college.

#	Action Steps	Responsible Party	Timeline	Progress
1.A.1	Sample Action Step: Draft charge and proposed membership for District General Education Subcommittee	District Council for Academic Affairs	September 2012	
1.A.2				
1.A.3				

Strategic Objective 1B: Review collegiate level English and Science courses to ensure comparability in units and learning objectives with equivalent courses at four-year CSUs or transfer model curriculum.

#	Action Steps	Responsible Party	Timeline	Progress
1.B.1				
1.B.2				

Objective 1C: Review English and Mathematics objectives for pre-collegiate courses to ensure comparability among District colleges.

#	Action Steps	Responsible Party	Timeline	Progress
1.C.1				
1.C.2				

Strategic Objective 1D: Participate in the SB1440 and C-ID initiative to ensure college courses are comparable District wide and within the California Community College System.

#	Action Steps	Responsible Party	Timeline	Progress
1.D.1				
1.D.2				

Board Goal 2: Maintain Instructional Quality within Budgetary Limits

Strategic Objective 2-A: Align technical and vocational courses and programs with employer and market needs.

#	Action Steps	Responsible Party	Timeline	Progress
2.A.1				
2.A.2				

Strategic Objective 2B: Develop professional development activities for faculty and staff to promote best practices and technological activities that empower employees to work smarter, allowing greater time to be expended on activities linked to student access, persistence, and success.

#	Action Steps	Responsible Party	Timeline	Progress
2.B.1				
2.B.2				

Board Goal 3: Prudent Fiscal Stewardship

Strategic Objective 3-A: Strengthen the link between discretionary budgeting and strategic planning.

#	Action Steps	Responsible Party	Timeline	Progress
3.A.1				
3.A.2				

Strategic Objective 3-B: Annually review and ensure that expenditures are linked to District Planning.

#	Action Steps	Responsible Party	Timeline	Progress
3.B.1				
3.B.2				

Strategic Objective 3-C: Improve the effectiveness and efficiency of all District operations, programs, and services and redirect associated cost savings to student learning and support.

#	Action Steps	Responsible Party	Timeline	Progress
3.C.1				
3.C.2				

Strategic Objective 3-D: Fund District Long-Term retirement obligations (GASB45) and maintain adequate cash reserves to handle cash flow requirements, including state funding deferrals and unanticipated expenditures.

#	Action Steps	Responsible Party	Timeline	Progress
3.D.1				
3.D.2				

Strategic Objective 3-E: Contain or reduce costs in areas such as healthcare, work-related injuries, facilities and operations, etc., to enable cost savings to be redirected to student learning and support.

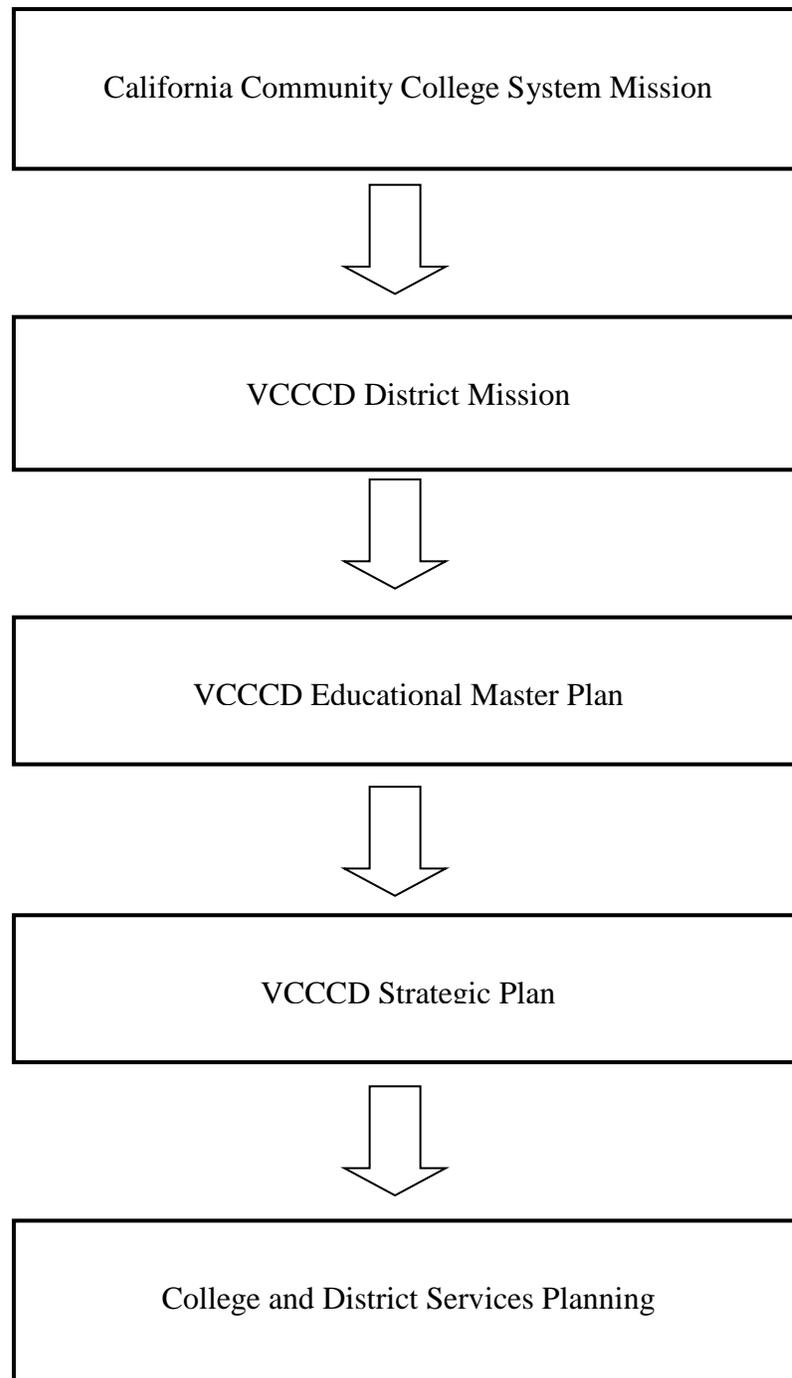
#	Action Steps	Responsible Party	Timeline	Progress
3.E.1				
3.E.2				

Strategic Objective 3-F: Monitor and assess the state's financial condition to allow for timely budgetary intervention to avoid crises and unanticipated disruptions in District operations and programs.

#	Action Steps	Responsible Party	Timeline	Progress
3.F.1				
3.F.2				

Flow of Planning from District to Colleges

The VCCCD Strategic Plan provides District level direction for the constituent Colleges and District Services to craft local Educational, Strategic and Action Plans. This flow of planning ensures the alignment of Mission at the various levels, and provides clear parameters for planning, decision-making, and resource allocation.



II.B. COLLEGE PLANNING

Individual college plans will be developed through appropriate campus-based participatory governance structures and will show clear linkages to the goals and missions of both the California Community College System and the Ventura County Community College District.

District Services Planning

District Services Planning is the annual program review process for centralized services. Program Review comprises four elements:

- Collection and analysis of quantitative and qualitative data related to services delivered in the current year
- Assessment of service effectiveness against documented District service standards and the Standards of the Accrediting Commission
- Proposal of improvements and action plans for the coming year
 - In **Capital Planning** and in **Information Technology**, a review of progress against the goals set in the *Facilities Master Plan* and the *Technology Master Plan* are conducted
- Allocation of resources to implement action plans

Services that are centrally delivered include the following:

- Administration and Finance
 - Finance
 - Administrative Services
 - Public Safety
- Capital Planning
- Educational Services
- Human Resources
- Information Technology

Month	Administrative Services and Finance	Capital Planning	Information Technology	Human Resources
January		CCCCO College Finance and Facilities Division issues enrollment projections		
February				
March				
April	Data Collection for Program Review	April 1: last day to appeal enrollment projections April 15: District Qtr Report to CCCCCO	Data Collection for Program Review	Data Collection for Program Review
May	Program Review and Planning		Program Review and Planning	Program Review and Planning
June	Districtwide Effectiveness Report to the Board		Districtwide Effectiveness Report to the Board	Districtwide Effectiveness Report to the Board
July		5-year Capital Outlay Plan due in CCCCCO; Final Project Proposals(FPP) submissions to CCCCCO; Initial Project proposals IPP Submission to CCCCCO; July 15: District Qtr Report to CCCCCO		
August	Publish Finished Plans for Coming Year	Publish Finished 5-year Plan	Publish Finished Plans for Coming Year	Publish Finished Plans for Coming Year
September				
October		October 1: Submit Space Inventory CCCCCO October 15: District Qtr Report to CCCCCO		
November				
December		December 15: submit Scheduled Maintenance and Special Repair request, 5-year plan		

The annual cycles of Program Review for District Services are outlined below:

Program Reviews in District Services are led by the Vice Chancellor, Associate Vice Chancellor, or Chancellor's Designee of the respective areas. These individuals are responsible for publishing plans and communicating matters of quality assurance to appropriate constituencies through the Districtwide Effectiveness Report and other established venues.

III. RESOURCE ALLOCATION

District wide resource allocations are guided by the VCCCD Mission Statement and the Board Goals as defined in the Educational Master Plan. The District Budget Allocation Model sets parameters for general fund unrestricted budget allocation to the Constituent College and District Services.

III.A. DISTRICT BUDGET ALLOCATION MODEL

Effective in fiscal year 2003-04, the District set aside the then-existing budget allocation model, which had been used to distribute district resources for the prior six years.

The model was primarily revenue-driven while providing for college base allocations and other fixed costs which did not necessarily equate directly to FTES generation. As such, the model relied both on revenue (FTES) and expenditure elements (dual characteristics) to serve as the mechanisms to produce the colleges and district level budget allocations. The model was, however, primarily FTES driven, with no cap placed on the funding of growth at the colleges, although the district as a whole had a funding cap. As the colleges evolved over time, the shift of resources favored the college(s) growing most rapidly and disadvantaged the college(s) growing more slowly, and the movement happened in an uncontrolled fashion. As a result, the model had been adjusted several times during its six-year period, and was believed to no longer meet the needs of the district and its colleges.

In 2003-04 when we set the model aside we distributed resources using the fiscal year 2002-03 allocation as a base, increasing or decreasing it proportionately each subsequent year based on changes in additional available resources from that point forward. That process continued over the next four years. Although we had a method to distribute funds, we did not have an agreed-upon budget allocation model. Distribution of new resources did not consider how the colleges had evolved since 2003-04. That method of allocating funds did not reflect how we received our funding from the state, the uniqueness of our colleges, nor the priorities of the district. In addition, the lack of an agreed-upon allocation model had been cited in the accreditation reports and would have been a major issue if not resolved.

New Model

During fiscal year 2006-07 the District Council on Administrative Services (DCAS) and the Cabinet worked simultaneously toward identifying the features of a model that would reflect the unique characteristics of each college, while recognizing how we are funded by the state, and be perceived as more equitable than the then existing arrangement.

The allocation model was adopted for use in the 2007-08 fiscal year.

Elements of the Model

The district recognized the value in developing a model with dual characteristics, i.e. one that includes elements based on both revenue (FTES), as well as expenditures. The model considers how the colleges have evolved, and is responsive to changes that will

occur in the future. The model also considers how we are funded from the state. The model is objective based, formula-driven, readily understood, reasonably applied, flexible and responsive, widely communicated, adequately documented, and perceived as equitable.

The adopted budget allocation model addresses the distribution of resources, and is not prescriptive in how funds are to be spent at the various locations (colleges and district office). The district acknowledges differences between its colleges and recognizes the colleges' needs to direct their resources based on their own plans and objectives in meeting the needs of their diverse populations and constituencies. The colleges have separate and specific budget development processes unique to each college, reflecting their organizational culture and priorities. It is at this level that the budget must be tied to each college's strategic plans and address accreditation requirements. DCAS will consider processes/templates to be used for this accreditation purpose.

Revenue

The budget allocation model is designed for the distribution of general fund-unrestricted revenue only. Other sources of funding are allocated either by the state directly to a specific college or the district has agreed on a separate allocation method for those funds. Through FY12, all general fund – unrestricted revenue was distributed through the model, including, but not limited to, state apportionment for FTES, local revenues such as lottery, non-resident tuition, interest income, and miscellaneous revenue traditionally accounted for in the general fund – unrestricted, unless agreed to be distributed through the Infrastructure Funding Model. This aspect of the Model was changed with the adoption of the Infrastructure Funding Model. At the end of the full transition of revenue to the Infrastructure Funding Model, only state apportionment, non-resident tuition, and items related to part-time comp and benefits will remain in the Districtwide Resource Budget Allocation Model.

Districtwide Support

The district recognizes that it is fiscally prudent to provide some services centrally through the operation of a district office (District Administrative Center – DAC). These services should primarily represent those functions that can be most effectively and efficiently administered in a centralized fashion.

In addition, the allocation model will continue to provide a pool of resources to support expenditures required to meet general districtwide obligations such as property and liability insurance, legal expenses, governing board expenses, financial and compliance audits, central technology hardware, software and management services, and other activities which support the district as a whole and cannot be conveniently or economically assigned to the other operating locations through a cost center referred to as Districtwide Services.

The district will continue to account for utilities in a central location, so as to mitigate the significant differences in utilization due to building size, construction, age, and climatic conditions affected by college locations.

College Allocations

In an attempt to develop a model that would be accepted as fair and equitable, areas of differences or unique characteristics between the colleges, as well as similarities, were identified. A model that considers and reflects these differences is consistent with the objective of equitability.

The differences, unique characteristics, and similarities identified include, but are not limited to, areas such as:

- Facility constraints/classroom capacity on each campus
How many rooms hold 25, 35, 100, etc. students?
How will capacity change over the new few years?
- Program Mix - mix of general education and vocational programs
Does each college have the same proportion of vocational/career tech to general education classes?
Does the difference in program costs impact the college's decision on what programs to maintain or develop?
- Students' level of educational preparedness
Does each college have the same proportion of students who are prepared to take college-level classes? Are needs for basic skills classes the same? (Some of the additional requirements/services of these students are to be met through special funding, such as categorical, not necessarily general fund – unrestricted dollars distributed through this model)
- Does each college have the same proportion of senior faculty (salary schedule placement)?
- How do fulltime / part time ratios of faculty compare?
- Are the contractual obligations, such as reassigned time and leaves, disproportionately distributed?
- What are the similarities/differences in core services?
- How does the size of each student body compare? (FTES)

It was imperative that each of these elements were considered in one or more of the components of the budget allocation model/calculation to ensure an equitable allocation process.

Year-end Balances

The allocation model recognizes the incentive in allowing budget locations to maintain their unexpended funds for future needs.

MECHANISM OF THE MODEL

Revenue

All projected general fund – unrestricted revenue will be included, unless identified to be distributed in a different fashion (such as to fund structural deficits). Restoration and growth revenue will not be included until the year after it is earned.

Districtwide Support

Districtwide Services (DWS)

The definition of DWS will be reviewed regularly. Components and specific line item budgets will be considered each year by DCAS for inclusion in this budget category or movement to another budget location.

Utilities

The budget for utilities will be based on historical and projected rates and usage, and presented to DCAS for review and concurrence.

District Administrative Center (DAC)

The District Administrative Center will receive a percentage (initially 5.8% of projected revenue). Each year, after review, if it is determined that specific budget items are to be reassigned between DWS and DAC or the colleges and DAC, the percentage of revenue will change accordingly, maintaining the same effective rate. (Effective with the FY16 Adoption Budget, revenue streams had been redirected and the DAC's proportionate percentage was 7.1%).

College Allocations

Class Schedule Delivery Allocation

Using a productivity factor of 525 and FTES from the current year, we derive a Full Time Equivalent Faculty (FTEF) number for the budget year. The college receives an allocation for the actual cost (salary and benefits) for the full time classroom faculty currently employed. This allocation is adjusted to reflect non-teaching assignment for these faculty, such as those on leave or reassigned time, and planned additional full-time faculty for the budget year. The balance of the allocation is distributed based on the average cost of a non-contractual FTEF.

Base Allocation (Fixed Allocation)

Each college receives an equal dollar amount that recognizes the fixed expenses/core services associated with operating a college, regardless of the size of its enrollment. This base allocation was established at 15% of revenue available for distribution, divided equally among the colleges. This recognizes economies of scale and provides a “small college” factor to the model.

FTES Allocation

The remainder of the available revenue is allocated to the colleges proportionate to their FTES (%) actually earned in the prior year, and recognizes how the District receives the bulk of its revenue through SB361.

Colleges are funded proportionate to their FTES (%) for their actual growth, up to the maximum percentage that the District was funded. Each college may then carry unfunded FTES (as does the District as a whole), and be entitled to use that excess if and when the District does. By using a blended average in the productivity factor as recommended above, colleges are not penalized for “overgrowth” if attained through efficiencies, i.e. because they experience less costs.

Transition/Implementation Funding

As implementation of the new allocation model shifted resources, the district recognized the need to provide for stability during the transition for colleges to gradually move towards full implementation of the new model.

During the implementation year, FY08, \$2 million of total revenue was allocated - 50% each to Oxnard and Ventura colleges. In FY09, \$1 million of available resources was available to be allocated - 50% each to Oxnard and Ventura colleges. Once applied, the amount of transition/implementation funding was assessed to ensure the colleges were able to transition without undue financial hardship.

Designated Reserves

Through Board action, designations of the unbudgeted reserves may be identified to address the anticipated one-time expenditure needs that cannot be met within the existing budgets. At the December 2014 Board meeting, the Board designated a total of \$7,900,000 for anticipated one-time expenditures in the following areas: Marketing, Emergency Preparedness, State Teachers Retirement System (STRS), Energy Efficiency, OPEB (Retiree Health Liability), and Enrollment Growth. The Board approved the use of these designated reserves as one-time expenditures in the March 2015, October 2015, and November 2015 Board meetings. During the annual budget development process, a review of the designated reserves will be conducted and a recommendation will be forwarded to the Chancellor for any adjustments to the designations.

Carry-over

In addition to the allocation derived through the mechanism of the model, the colleges and district office are allowed to carry-over any unexpended funds as of June 30 into the new budget year, up to a maximum of 2% of their respective prior year budgets. These amounts are placed in a designated reserve as of June 30, to be distributed for expenditures as of July 1 of the budget year.

Updates

Since the adoption of this new model for 2007-08 fiscal year, and in accordance with the commitment to the Board to regularly review the model components to ensure a more sustainable model, the District Council of Administrative Services (DCAS) reviews the model annually. During the first part of 2009, they recommended modifications to the Class Schedule Delivery Allocation and the FTES Allocation segments of the model. The Board of Trustees approved the recommended changes at its March 2009 Meeting.

In 2010-11 DCAS developed a plan to address the district's capital structural deficits and recommended that specific revenues (lottery, interest income and administration fee revenue) be removed over time from the general budget allocation model and allocated in a different method.

In 2014-2015 DCAS recommended the excess revenue related to FTES generation from international students be taken out of the model and be placed in Fund 114. This incentivizes each campus to develop an international student program by allowing the excess revenue to be retained by the home campus. DCAS also recommended a productivity factor of 525 be used for each campus. This change caused a significant shift of \$500,000 from Ventura College to Moorpark College. To alleviate possible operational disruptions, the change in the productivity factor will be phased in over four years with all campuses being held harmless in the first year (FY 15-16). In the subsequent three years, Ventura College's allocation will be reduced by \$166,666 each year. Further, DCAS recommended the carryover percentage be changed from 1% to 2%. These changes were executed in the 2015-2016 adopted budget.

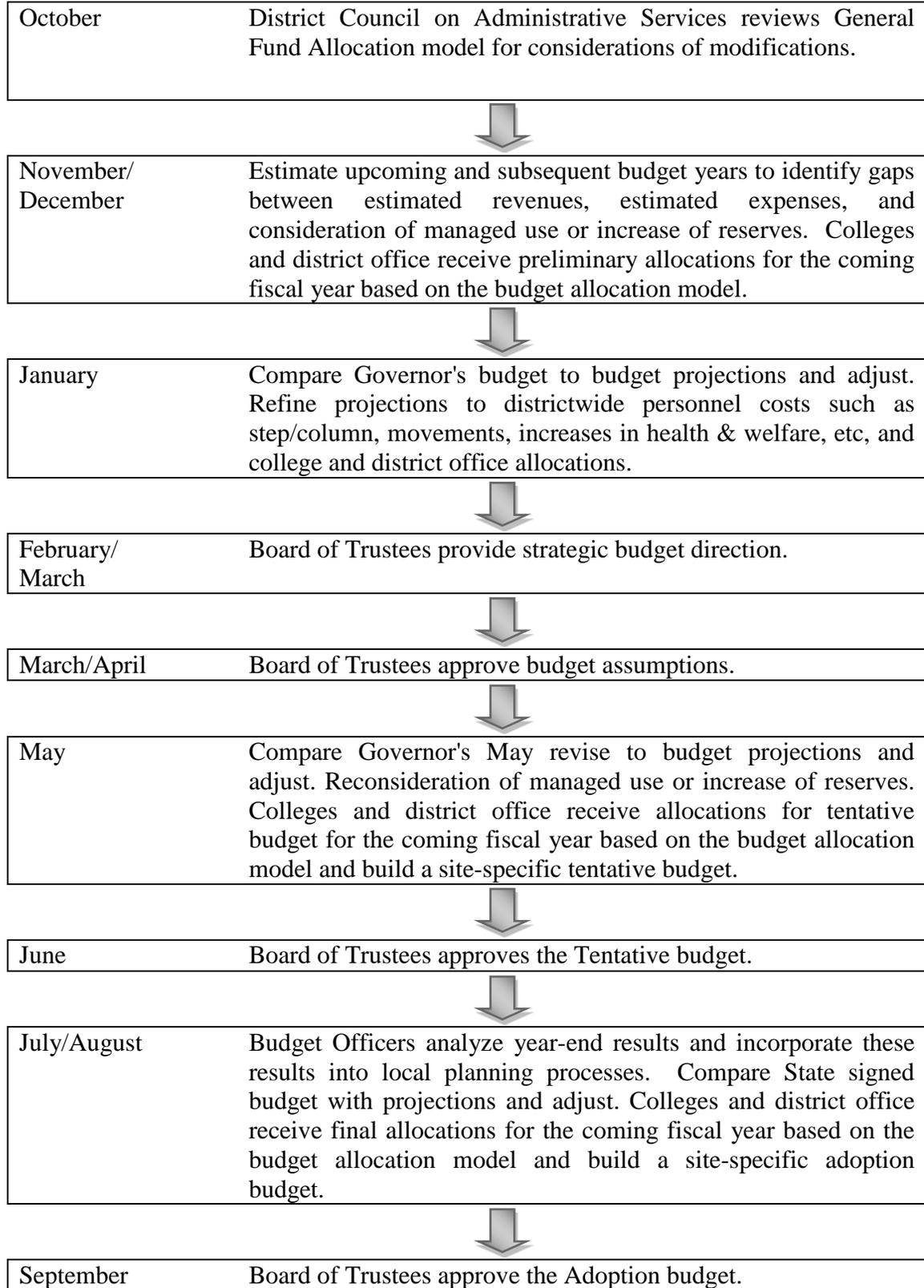
In Summary

The District resource budget allocation model is complex enough to reflect the unique characteristics of our colleges and the needs of a multi-college district while recognizing how the district is funded from the state, yet simple enough to be readily understood, easily maintained, and transparent. Finally, it is driven by factors which command accountability, predictability, and equity.

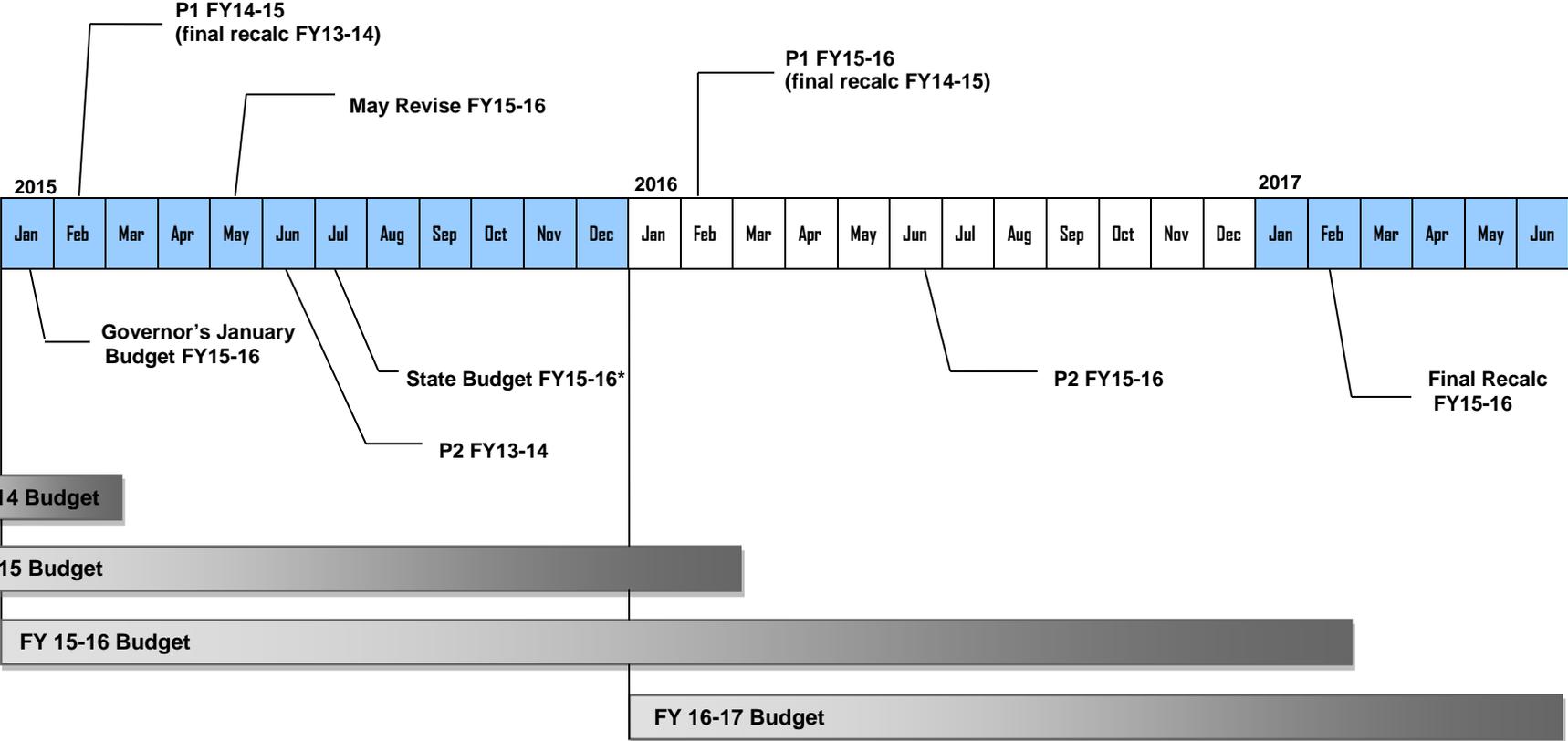
Overall, the model addresses the Basic Principles for a budget allocation model previously adopted by the board. It utilizes formulas and variables that have been meaningfully studied, readily defined, easily measured, and consistently reported. As with this budget, no model will ever be perfect and it is doubtful that the district will ever achieve complete consensus as to how its resources should be distributed; however the model as proposed, adopted, and modified comes as close to that consensus as we can

reasonably expect. DCAS and Cabinet independently reviewed the model prior to recommendation to the Board and concurred that it meets the budget principles established by the board and is “fair and equitable” for all colleges and the district operational units. Annually, the model is reviewed by DCAS and Cabinet and revised consistent with the requirements identified and agreed upon at that time. Any proposed revisions to the model are presented to the board for approval with the budget assumptions document.

III.B. DISTRICT BUDGET DEVELOPMENT PROCESS



Ventura County Community College District State Budget Process Timeline



- Governor's January Proposal - includes estimates of state revenues
- Governor's May Revise - revised estimates of state revenues
 - * The State adoption budget should be approved by July, but in recent years has been as late as September/October.
- Final State Budget - final state revenue
- P1- estimates of statewide budget shortfalls in property tax and enrollment fees; deficit factor to growth funding; may allocate special funding
- P2 - revised estimates of statewide budget shortfalls in property tax and enrollment fees; deficit factor to growth funding; may allocate special funding
- Final Recalc - Final calculation of state revenue- includes any final deficit, distribution of unclaimed dollars that are not returned by Budget Act/Law

IV. ASSESSMENT, PROGRAM & PROCESS IMPROVEMENT

VCCCD assesses its planning efforts in two ways. It assesses the overall effectiveness of College and Districtwide services in supporting student success; it also assesses the effectiveness of the planning process.

IV.A. ASSESSMENT OF INSTITUTIONAL EFFECTIVENESS

The assessment of institutional effectiveness involves review of accomplishments and dialogue on continuous improvement. Assessment activities and dialogue occur during the annual Board of Trustees Planning Session in June. Assessments in this area include:

- The annual review of the District Mission
- The annual submission of the District Effectiveness Report addressing prior year Board Goals
- The annual review and revision of Board Goals
- The annual review of Progress on Strategic Plan Objectives
- The mid-cycle review of Board Goals in Year-3 of the 6-year planning cycle to ensure continuing alignment with the Educational Master Plan

Annual Review of the District Mission

The District Mission is reviewed at the annual Board of Trustees Planning Session to ensure alignment with the System Mission of the California Community Colleges. The affirmed Mission is distributed to the constituent Colleges to provide a framework by which to review and validate the local College Missions.

Annual Submission of the *District Effectiveness Report*

The *District Effectiveness Report* is presented at the annual Board of Trustees Planning Session for review and dialogue. The Report addresses institutional effectiveness of the three constituent colleges and district services. It provides three years of data for indicators that are aligned with Board Goals.

Annual Review of Progress on Strategic Plan Objectives

The Strategic Plan Objectives are reviewed for progress and completion. The Colleges and Districtwide Services report on the progress made in implementing the Action Steps that operationalize the Strategic Plan Objectives.

Annual Review of Progress on Board Goals

The Annual Review of Progress on Board Goals is conducted at the Board of Trustees Planning Session utilizing the information from the Assessment of Progress on Strategic Plan Objectives, and the information documented in the *District Effectiveness Report*. If

needed, adjustments are made to the Board Goals and Strategic Plan Objectives for the coming year to ensure continuing progress toward student success, and accurate alignment with the District Mission.

Mid-Cycle Review of Progress on Board Goals

The mid-cycle review of Board Goals in Year 3 of the 6-year planning cycle is to ensure continuing alignment with the Educational Master Plan. During the third year of the Educational Master Plan cycle, the Board of Trustees conducts a high level review of the assumptions of the Educational Master Plan assumptions, and an examination of the relevance of the Board Goals documented in the Master Plan. This high level review ensures that the assumptions of the Master Plan remain valid over time, and the Board Goals that emerge from these assumptions continue to align with the District Mission.

IV.B. ASSESSMENT OF PROCESS EFFECTIVENESS

The assessment of process effectiveness for Districtwide planning includes two activities:

- The annual Consultation Council Review of the Districtwide Planning Process
- Annual Board of Trustees Review of Districtwide Planning Process

Annual Consultation Council Review of Districtwide Planning Process

Consultation Council is charged with overseeing the Districtwide Planning Process. The Council, or a group delegate by the Council, performs an annual audit of the Districtwide Planning Process for operational effectiveness. The audit includes a review of this Planning Manual, and input by constituents on process issues during plan implementation. The results of this review are presented to the Board of Trustees during the June Board of Trustees Planning Session.

Annual Board of Trustees Review of Districtwide Planning Process

The Board of Trustees agendas a review of the Districtwide Planning Process at its annual Board of Trustees Planning Session. The review includes a reporting by Consultation Council regarding the effectiveness of the process as experienced by the constituent groups, a Board-led dialogue on the results, and any suggestions to improve the process for the coming year. Improvements adopted in the review process will be documented in the subsequent iteration of this Planning Manual.