Report of Recommendation from
The President’s Planning Task Force
To the College Council

December 8, 2008

Overview

The President’s Planning Task Force reviewed the college’s planning cycle program and services review processes. The following goals are being pursued:

- A regular assessment and review process for the Mission and Vision statement will be in place to meet Accreditation Standard I.A.3 (*).
- A regular assessment and review process for college planning processes (including program review) to meet Standard I.B.6 (*).
- The program review process will have enhanced data, including ongoing environmental scans, which will be used to meet Accreditation Standards I.B.5 (*) and III.D.1.d (*) by codifying the links between program review, budget decision-making, facilities planning, and information technology decisions that support student learning outcomes.
- Achieve the Sustainable Continuous Quality Improvement Level of Implementation Planning and Program Review as defined by the ACCJC/WASC Rubric for Evaluating Institutional Effectiveness for Program Review, Planning and Student Learning Outcomes.

(*) Standards Referenced in Outcomes

**Standard I.A.3.** Using the institution's governance and decision-making processes, the institution reviews its mission statement on a regular basis and revises it as necessary.

**Standard I.B.6.** The institution assures the effectiveness of its ongoing planning and resource allocation processes by systematically reviewing and modifying, as appropriate, all parts of the cycle, including institutional and other research efforts.

**Standard I.B.5.** The institution uses documented assessment results to communicate matters of quality assurance to appropriate constituencies.

**Standard III.D.1.d.** The institution clearly defines and follows its guidelines and processes for financial planning and budget development, with all constituencies having appropriate opportunities to participate in the development of institutional plans and budgets.

Task Force Membership:

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<th>Name</th>
<th>Title/Department</th>
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<td>President</td>
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<td>VPs and AVP</td>
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Report of Task Force Recommendations

Review of WASC Planning and Program Review Effectiveness Rubric

The ACCJC/WASC “Rubric for Evaluating Institutional Effectiveness” is an excellent framework for assessing effective implementation in three important areas: Program Review, Planning, and Student Learning Outcomes. The levels of implementation include Awareness, Development, Proficiency, and Sustainability. The Task Force used the rubric to review and assess the college’s progress in Planning and Program Review. It was determined that the college has made good progress and is nearing sustainable proficiency in both areas.

Glossary of Planning Terminology

As the Task Force discussed the planning cycle and program review process, and the relationships between the two, it became clear that definitions of certain planning terms would be needed. The Task Force has developed a Glossary of Planning Terminology to help clarify the college dialogue about and implementation of planning activities. The Student Learning Outcomes and Assessment Committee also reviewed the definitions related to student learning outcomes.

Attachment 1: Glossary of Planning Terminology

Four-Year Plan to Improve the Planning and Program and Services Review Processes

To fully implement the college’s improvements to planning and program and services review a four-year implementation strategy has been developed. This four-year plan takes into account the fact that while improvements are being made planning and assessment must still take place and a transition process is needed to fully achieve the planned improvements.

Attachment 2: Chart of four-year implementation timeline with key milestones

Documenting the Strategic and Annual Planning Cycles

The Task Force worked with the President to develop and document Strategic and Annual Planning Cycles. This builds from the strategic planning and annual planning cycles already in place. The attached charts give an overview documentation of the proposed cycles.

Attachment 3: Charts describing the Strategic and Annual Planning Cycles

Improving the Strategic Planning Process

Environmental Scan

As shown in the charts referenced above, a key element in the Strategic Planning Cycle is conducting and documenting an Environmental Scan of internal and external data and trends that have an impact on college planning. The Glossary of Planning Terminology defines Environmental Scan as “the acquisition and use of information about events, trends, and relationships in the local community and beyond that informs the college of forces and needs relevant to planning future direction. Environmental scanning constitutes a primary mode for institutional learning and self assessment.”

The Office of Institutional Research has made significant progress in designing and publishing Ohlone’s Environmental Scan. The College Council is receiving a report from Dean of Institutional Research Mike Bowman on that progress, which augments this report to the Council from the President’s Planning Task Force.
Assessment and Revision of the College Mission and Values, and Strategic Goals and Objectives

Another key element in the Strategic Planning Cycle is creating an ongoing feedback loop as goals and objectives are assessed and the results are fed back into the planning process. To that end, the college will engage in an assessment and possible revision of the 2005-2010 Strategic Plan, including a review of the college Mission and Values. The President’s Staff will begin the process by reviewing research and other findings regarding the strategic goals and objectives. The President will develop an initial assessment report and proposed revisions to goals and objectives. This report will be reviewed by the College Council at its January 21 Retreat, including a review of the environmental scan. The assessment report will be presented in the President’s fixed flex speech on January 23. A college-wide Strategic Planning Summit will be conducted on February 27 or March 6 and a series of community forums and surveys will be conducted during February, March and April. The Board of Trustees will have a first reading of Strategic Plan Assessment and Proposed Revisions at the April 22 Board Workshop with approval following at the May 10 Board Meeting.

Improving the Annual Planning Cycle

The Task Force worked with the President to develop and document an Annual Planning Cycle as described in the charts contained in Attachment 3 referenced above.

As described in more detail below, the Program and Services Review process will become central to the cycle of annual college planning. There are four points in the planning process where the work of college programs and services are linked directly to the college goals and objectives.

- A college objective may specify certain programs and services that will be involved in achieving that particular objective.
- In Section 2 of the Program and Services Review module the purpose and work of the particular program or service are linked to the college goals and objectives.
- In Section 5 of the Program and Services Review module the Program Improvement Objectives are linked to the college goals and objectives.
- Achieving college goals and objectives is an important criterion in the annual prioritization process of Program Improvement Objectives for resource allocation (budget development).

The prioritization process would use the traditional process of working from departments up through divisions, VPs, and then to the College Council and President to finalize the annual priorities:

- Programs/Departments will prioritize the Program Improvement Objectives.
- Instructional Divisions prioritize the Program Improvement Objectives list supplied from Program/Department process (extra step for instructional programs).
- VPs prioritize the Program Improvement Objectives list supplied from Program/Department process or Divisions in the case of instructional programs.
- College Council reviews the VP area lists to form a college list of annual objectives. (could be a task force or CC exec)
- President makes prioritized list final.
- An emergency process to get a new objective onto the list would also be needed.

While the eventual Planning Cycle is being developed, an interim process will be employed to address the planning cycle in 2008-09 for planning the 2009-10 budget. This interim process will approximate the eventual process, particularly the feeding of Program Improvement Objective from Program and Services Reviews into the college prioritization and planning system. This approximation process will be detailed below after the next section on improving program and services review.
Improving the Program and Services Review Process

Six years ago Ohlone was one of the pioneer adopters of the web-based CurricUNET database system for curriculum development and review resulting in a streamlined and paperless curriculum process. Last year Governet, creators of CurricUNET, unveiled its new Program Review module. The College Council appropriated the funds for acquisition, customization and implementation of the module during the 2008-09 academic year. The features of the Program Review Module directly address the accreditation recommendation we received. The database tool is relational, which facilitates the generation of data and the linkages between program review, budget decision-making, facilities planning, and information technology decisions. The new module will track activities and outcomes tied to budget requests, provide historical tracking allowing for program review feedback loops, and track recommendations and commendations from review to review. Ultimately, this tool could make Program and Services Review an ongoing rather than intermittent process, continually feeding into the institutional planning cycle.

Excellent progress is being made in developing the specifications for the programming of the customized version of the module. A pilot group of six programs and services has been involved in the customization process and will begin using a beta version of the module in January 2009. These include two from programs from instructional areas (Mathematics and Computer Science), two departments from student development (Admissions and Records and International Programs and Services, and two from administrative service areas (Accounts Payable and Buildings and Grounds).

The members of the President’s Task Force worked on 11 Program Improvement Objectives to provide directions and examples to other areas. A web-based input tool was developed for interim use. One of the Computer Science programming classes is creating a more powerful version, which will have sorting and linking capabilities. This tool will be used during the “approximation” process and will be incorporated into the CurricUNET Program and Services Review Module.

Attachment 4: Programs and Services by Activity Center
Attachment 5: Web-Based Tool for Inputting Program Improvement Objectives

Approximation of Annual Planning Cycle for 2009-10

As mentioned above, an interim “approximation” process will be employed in 2008-09 for planning the 2009-10 budget, while the eventual Planning Cycle is under development and implementation. A focus of the process will be integrating Program Improvement Objectives from Program and Services Reviews into the college prioritization and planning system. The Activity Centers of the college General Ledger system (which mirrors the TOP Codes for instructional programs) has been used to identify the Programs and Services to be reviewed to show linkage to the college budget. Most Programs, Disciplines and Departments have completed Program and Services Review during the past four-year cycle and these Review Reports are posted on the Program and Services Review website. During 2008-09, all Programs, Disciplines and Departments will submit one Program Improvement Objective from their most recent Program and Service Review to be part of the prioritization process for developing the 2009-10 college plan and budget.
Attachment 1: Glossary of Planning Terminology
Attachment 2: Chart of four-year implementation timeline with key milestones
Attachment 3: Charts describing the Strategic and Annual Planning Cycles
Attachment 4: Programs and Services by Activity Center
Attachment 5: Web-Based Tool for Inputting Program Improvement Objectives