

INTEGRATED PLANNING MANUAL EIGHTH EDITION



Mission

Citrus College provides students with quality educational experiences and support services that lead to the successful completion of degrees, transfer, certificates, career/technical education and basic skills proficiency. The college fosters academic and career success through the development of critical thinking, effective communication, creativity, and cultural awareness in a safe, accessible, and affordable learning environment. In meeting the needs of our demographically diverse student population, we embrace equity and accountability through measurable learning outcomes, ethical data-driven decisions, and student achievement.

Vision

Citrus College is driven to provide excellent educational opportunities that are responsive to the needs of our students and empower them to meet and exceed challenges as active participants in shaping the future of our world.

Values

1. **Student Success and Completion:** Meeting student needs by creating an educational environment in which students can attain a variety of goals.
2. **Excellence:** Maintaining a high standard of integrity and performance leading to the achievement of academic and career goals.
3. **Collaboration:** Seeking input from all sectors of the college and the community.
4. **Diversity:** Fostering a learning community in which the diverse values, goals, and learning styles of all students are recognized and supported.
5. **Life-Long Learning:** Encouraging enthusiastic, independent thinkers and learners striving for personal growth.
6. **Integrity:** Behaving ethically in all interactions at all levels.
7. **Technological Advancement:** Implementing cutting-edge technology that enhances instruction and prepares students for life-long success.



Dear Citrus College Colleagues and Friends:

It is my pleasure to present to you the Citrus College 2020-2022 Integrated Planning Manual!

As you know, planning is a vital component of operations at Citrus College. Woven throughout the fabric of every process and procedure, the college's institutional planning involves more than just setting goals and outlining objectives. Instead, it is a structured system that uses qualitative and quantitative information to make data-driven decisions. This publication outlines the major planning documents used by the college and illustrates the connection between each plan.

First developed in May 2011, Citrus College's Integrated Planning Manual ensures that the college maintains a dynamic, forward-thinking mindset that is relevant to our institutional goal of increasing student success and completion. Under the guidance of the Institutional Effectiveness Committee, it is reviewed and revised every two years to ensure that it is kept current with the college's mission. This continuous, reflective process allows the college to maintain constant improvement and uphold high standards of excellence in all programs.

I am pleased to note that during the last two years several major planning accomplishments have occurred. The board of trustees approved new mission, vision and value statements in July 2019. Another significant achievement was the creation of the 2020-2030 Educational and Facilities Master Plan. And, while this manual highlights our progress, it also looks toward the future. The creation of a new sustainability plan and the start of our next strategic planning timeframe are also outlined in this publication.

Studies show that institutions that integrate their planning do a better job of adapting to changing conditions. They also tend to be more effective in attaining the key outcomes set forth in their plans. As superintendent/president of Citrus College, I am extremely proud of the fact that Citrus College's approach to planning has established the college as a leader in higher education. I commend and thank the entire college community for embracing institutional planning. Together, we will shape the future of Citrus College and transform the lives of thousands of students.

Sincerely,
Geraldine M. Perri, Ph.D.
Superintendent/President

Citrus Community College District Board of Trustees

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Introduction

The purpose of the Citrus College Integrated Planning Manual is to guide institutional planning. This manual describes the key planning functions of Citrus College, the constituent groups that participate in planning, and the connections to institutional adherence to accreditation standards. This document complements the [Organization and Governance Handbook](#) which provides a detailed description of the college's shared governance structure and major committees.

For each component of the integrated planning process, this document identifies the:

- Specific purpose,
- Processes by which recommendations will be developed,
- Timeline,
- Individuals or groups responsible for initiating and completing the tasks, and
- Individuals or groups that will receive the recommendations and render final decisions.

The Institutional Effectiveness Committee (IEC) reviews this manual every two years.

This version of the manual was approved by IEC on May 11, 2020.



Integrated Planning Model

College planning is unified by a common set of assumptions and well-defined procedures dedicated to the continuous improvement of institutional effectiveness. This is achieved, in part, by adherence to accreditation standards, eligibility criteria and policies established by the Accrediting Commission of Community and Junior Colleges. The driving force for all college efforts is student learning. Assessments focus on how well students are learning and, based on those assessments, changes are made to improve student learning and success.

Planning begins with a review of the college's mission, vision and values. This sets the stage for the development of the Strategic Plan, which identifies the overarching institutional goal, strategic objectives and critical focus areas. The college's single overarching goal is to increase student success and completion. The strategic objectives are concrete measures that ensure accountability and attainment of the institutional goal. The focus areas direct the college's energies and resources.



Institutional strategies are identified from the institutional goal, strategic objectives, and focus areas. Responsibility for the achievement of these strategies is assigned to the appropriate college divisions, as reflected in the Annual Implementation Plan and Progress Reports. In turn, those divisions and programs incorporate the institutional goal and objectives in their short-term and long-term plans. The Educational and Facilities Master Plan is the college's long-term plan for academic affairs, student services, and facilities. The Enrollment Management Plan guides the year-to-year alignment of the college's educational goals and resources to ensure that (1) course offerings meet the needs of students, (2) students persist and complete their educational goals, and (3) student enrollment produces sufficient resources to support the educational mission and educational goals of the college. The Student Equity Plan includes activities designed to narrow and eliminate equity gaps in student performance. The institutional support plans (Human Resources Plan, Sustainability Plan and Technology Plan) are developed to meet specific goals and objectives from the Strategic Plan.

As depicted in the planning model flow chart on the following page, dialogue regarding the improvement of institutional effectiveness occurs in an ongoing and systematic cycle. Both college-wide plans and program reviews are linked to the resource allocation processes that are aimed at achieving the institutional goal and strategic objectives. The last element of the model is implementation. Informed by data and supported by resource allocations, changes are made in divisions and programs throughout the college to promote student success.

INTEGRATED PLANNING MODEL

An ongoing and systematic cycle of assessment that ensures the improvement of institutional effectiveness



Mission, Vision, Values
Serve as the basis for all college planning

Strategic Plan
Guides the direction of the college's energies and resources

Board Goals
Identify the Board's role in accomplishing institutional goals and strategic objectives

Educational and Facilities Master Plan
Charts the college's long-term course toward accomplishing its mission, vision, and values

Institutional Support Plans
Developed to support the goal and strategies from the strategic plan not addressed in the Educational and Facilities Master Plan

Enrollment Management Plan
Ensures student enrollment produces sufficient resources and course offerings meet student needs, leading to completion

Annual Implementation Plan/ Progress Report
Establishes the timeline for achieving the institutional goal; reports the progress of the activities in the annual plan

Human Resources Plan
Meets the strategic objectives aligned with Human Resources

Student Equity Plan
Includes activities designed to narrow and eliminate equity gaps in student performance

Technology Plan
Guides the implementation of technology at the college

Instructional Program Review
Vehicle for ongoing integration of the needs and recommendations for the college's instructional programs

Resource Allocation
Links program reviews and strategic planning to resources needed to accomplish the institutional goal

Sustainability Plan
Actualizes the strategic objectives regarding sustainability

Academic Support Program Review
Vehicle for ongoing integration of the needs and recommendations for the college's academic support programs

Implementation
Informed by data and supported by resource allocations, changes are made in divisions and programs throughout the college to promote student success

Institutional Support Program Review
Vehicle for ongoing integration of the needs and recommendations for the college's institutional support programs

Student Services Program Review
Vehicle for ongoing integration of the needs and recommendations for the college's student services programs

Reviewed and approved by IEC on May 11, 2020

Mission, Vision, Values

Purpose	Serve as the basis for all college planning Describe the college's intended student population and the services the college commits to provide to the local community
Process	<ul style="list-style-type: none">o Reviewed as a first step in the development of a new Strategic Plano Includes opportunities for input from all college constituencieso Approved by the Steering Committee, the Academic Senate, and the superintendent/president's cabinet
Timeline	Reviewed every five years
Initiation/Completion	Initiated by the superintendent/president and completed by an ad hoc committee of the Steering Committee
Recommendations to	Steering Committee Superintendent/president Board of trustees



Strategic Plan

Purpose	Guides the direction of the college's energies and resources Derived from the mission, vision, and values Articulates one overarching institutional goal, strategic objectives and focus areas that are the foundation for all other college plans
Process	<ul style="list-style-type: none">o Initiate dialogue and deliberation by all constituencies of data from internal and external environmental scans that identify sources of opportunities and challengeso Develop the institutional goal, strategic objectives and focus areaso Develop links between collegewide strategic objectives, focus areas, and applicable college plans, including but not limited to the Educational and Facilities Master Plan and institutional support plans
Timeline	Revised every five years
Initiation/Completion	Initiated by the superintendent/president and completed by an ad hoc committee of the Steering Committee
Recommendations to	Steering Committee Superintendent/president Board of trustees



Board Goals

Purpose	Identifies board of trustees' role in accomplishing the institutional goal and strategic objectives
Process	<ul style="list-style-type: none">○ Review Strategic Plan institutional goal and focus areas○ Identify sources of board of trustees' opportunities and challenges○ Develop board goals in conjunction with the focus areas identified in the Strategic Plan
Timeline	Developed annually
Initiation/Completion	President of the board of trustees
Recommendations to	Board of trustees



Members of the Citrus Community College District Board of Trustees
Left to right: Mr. Austin Riggs, Student Trustee; Dr. Edward C. Ortell, Member;
Mrs. Joanne Montgomery, Clerk/Secretary; Dr. Patricia A. Rasmussen, President;
Mrs. Susan M. Keith, Vice President; Dr. Barbara R. Dickerson, Member

Educational and Facilities Master Plan

Purpose	Charts the college’s long-term course toward accomplishing its mission, vision, and values Guides the long-term educational and facility needs of the college Focuses on change and improvement
Process	<ul style="list-style-type: none">○ Analyze existing conditions – anticipate labor market needs○ Anticipate changes in the community○ Anticipate growth of the college as a whole○ Anticipate changes in programs and services○ In concert with the Strategic Plan, develop long-term future directions for each academic affairs and student services program○ Include opportunities for input from all college constituencies
Timeline	Developed every 10 years
Initiation/Completion	Initiated by the superintendent/president and completed by the Steering Committee or the designated ad hoc committee
Recommendations to	Steering Committee Superintendent/president Board of trustees



Photo Credit: Luke Cardona, Citrus College photography student

Enrollment Management Plan

Purpose	Guides the year-to-year alignment of the college’s educational goals and resources to ensure that (1) course offerings meet the needs of students, (2) students persist and complete their educational goals, and (3) student enrollment produces sufficient resources to support the educational mission and educational goals of the college
Process	<ul style="list-style-type: none">o Analyze and discuss the areas of the Enrollment Managemento Review enrollment metricso Review, monitor, and modify the Enrollment Management Plan activitieso Increase communications related to enrollment management activities
Timeline	Developed every two years and reviewed annually; revised as appropriate
Initiation/Completion	Initiated by the vice president of academic affairs and completed by the members of the Enrollment Management Committee
Recommendations to	Educational Programs Committee (EPC)



Student Equity Plan

Purpose	The purpose of the Student Equity Plan is to facilitate college efforts in ensuring student success for all students, regardless of race, gender, age, disability, or economic circumstances. The plan outlines goals to improve access, persistence, English and mathematics completion, vision goal (degree and certificate) completion, and transfer through academic and student support services across campus.
Process	<ul style="list-style-type: none">o Disaggregate data to identify disproportionately impacted (DI) student populationso Identify activities and services to address gaps in student achievemento Track the progress of activities outlinedo In conjunction with the Strategic Plan, evaluate the progress made toward meeting the student equity goals
Timeline	Revised every three years
Initiation/Completion	Initiated by the dean of counseling programs and services and completed by the Student Equity and Achievement Program Committee
Recommendations to	Student Services Committee Steering Committee Superintendent/president Board of trustees



Institutional Support Plan: Sustainability Plan

Purpose	The purpose of the Sustainability Plan is to prepare the college for environmental and regulatory challenges related to sustainability, to guide the college toward becoming a more sustainable institution, to prepare students for a “green” economy, and to be a good steward of resources.
Process	<ul style="list-style-type: none">o Analyze existing projects completed to dateo Identify potential projects that present a value-added benefito Implement projects that are economically viableo Encourage collegewide participationo Encourage an attitude of behavior modification as it relates to sustainable practiceso Track utility resource usage, compile data, and set goals for usage reduction
Timeline	Developed every five years and reviewed annually
Initiation/Completion	Initiated by the vice president of finance and administrative services, and the director of facilities and construction and completed by the Sustainability Committee
Recommendations to	Physical Resources Committee Steering Committee Superintendent/president Board of trustees



Institutional Support Plan: Technology Plan

Purpose	<p>Guides the implementation of technology at the college</p> <p>Responds to the institutional goal and strategic objectives from the Strategic Plan and the Educational and Facilities Master Plan</p> <p>Encompasses the evaluation and development of the infrastructure, administrative information systems, operations support, and management of web resources</p>
Process	<ul style="list-style-type: none">o Analyze technology needs and requirements for the collegeo Include the Strategic Plan institutional goal, strategic objectives, and focus areas assigned to technologyo Incorporate technology requirements defined in the Educational and Facilities Master Plano Develop technology focus areas, planning goals, and related annual planning objectiveso Communicate the achievement of the institutional goal and strategic objectives each spring through the Strategic Plan Progress Report and every five years through the institutional support program reviewo Communicate planning goals and objectives to the resources allocation process in support of funding requests
Timeline	Developed every five years, with annual reviews and updates
Initiation/Completion	Initiated by the chief information services officer and completed by the College Information Technology Committee
Recommendations to	Steering Committee Superintendent/president

Institutional Support Plan: Human Resources Plan

Purpose	<p>Meets the strategic objectives from the Strategic Plan aligned with human resources</p> <p>Meets aligned objectives from the Educational and Facilities Master Plan</p> <p>Reports outcomes identified in program review</p>
Process	<ul style="list-style-type: none">o Develop and implement objectiveso Communicate the achievement of the institutional goal and strategic objectives each spring through the Strategic Plan Progress Report and every five years through the institutional support program reviewo Communicate progress on aligned strategic objectives from the Educational and Facilities Master Plan through the human resources program review
Timeline	<p>Developed every five years and reviewed annually; revised as appropriate</p>
Initiation/Completion	<p>Initiated by the director of human resources and completed by the Human Resources/Staff Diversity Advisory Committee</p>
Recommendations to	<p>Steering Committee</p> <p>Superintendent/president</p>



Program Review

Purpose

Provides a vehicle for the on-going integration of student learning and completion information, program needs, and recommendations with the college institutional planning and resource allocation processes

Assures that consistent and continuous commitment to improving student learning and educational effectiveness is a demonstrable priority in all planning structures and processes

Advances the college mission by promoting excellence in programs and services offered by Citrus College through the collection and analysis of documents and data

Process

- Academic support programs – complete an annual program review report. Every fifth year, a comprehensive program review is submitted to the board of trustees and posted publicly
- Institutional support programs – complete an annual program review report. Every fifth year, a comprehensive program review is submitted to the board of trustees and posted publicly
- Instructional programs – complete a core program review report and one of five “Plus One” addenda. Every fifth year, the “Year Five: Program Overview” and summary report is submitted to the board of trustees and posted publicly
- Student Services Programs – Complete an annual Program Review Report. Every fifth year, a comprehensive program review is submitted to the board of trustees and posted publicly

Timeline

Annual and comprehensive program review cycles are reviewed yearly by the Program Review Committee (see appendices A and B for details)

Initiation/Completion Initiated by the program review coordinator and reviewed by the Program Review Committee

Recommendations to Program Review Committee
Financial Resources Committee
Steering Committee
Superintendent/president
Board of trustees

Documents related to program review, such as the annual activity cycle, five-year comprehensive cycle, and the resource request process flow-chart and narrative are included as appendices A through D.



Resource Allocation

The resource allocation processes link program reviews and strategic planning to the resources needed to accomplish the college's institutional goals. These processes apply only to the allocation of discretionary funds within the general fund or funds beyond fixed costs, as well as reallocated funds from other sources. This allocation system does not include funds for faculty positions, capital equipment or facilities. This process excludes categorical funds or other restricted funds.

The guiding principles for all resource allocation processes are as follows:

1. Resources include all assets of the college, including its human resources, physical resources, technology resources and financial resources.
2. The processes for allocating resources are transparent. All members of the college community shall be informed about the planning components that lead to resource allocations.
3. Priority will be given to resource requests that are supported by program reviews and help achieve institutional goals and strategic objectives.
4. To the extent that it is fiscally viable, the Citrus College Foundation will fund Innovation Grants to support faculty/staff ideas through a competitive mini-grant process.

Purpose	Allocates funds to support the college's institutional goals and strategic objectives
Process	Begins in April each year with the development of budget assumptions, which forecast the available discretionary general fund resources for the coming fiscal year
Timeline	Developed annually
Initiation/Completion	Initiated by the vice president of finance and administrative services
Recommendations to	Financial Resources Committee Steering Committee Superintendent/president

Implementation

The final element of the model is Implementation. Informed by data and supported by resource allocations, changes are made in divisions and programs throughout the college to promote student success. This is the last step in the model, leading to the beginning of the next cycle.



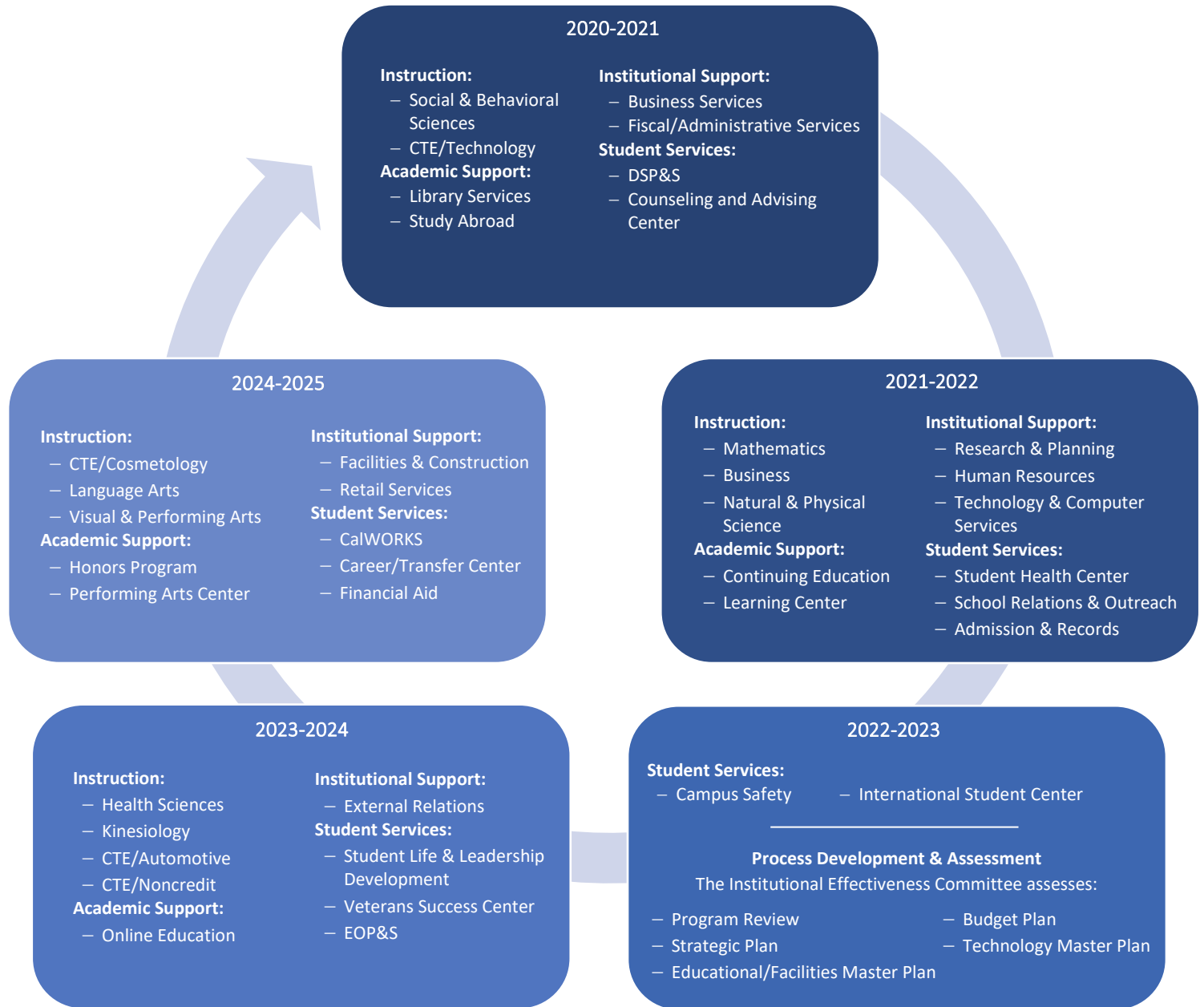
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Appendix A – Program Review Activity Cycle: January - December

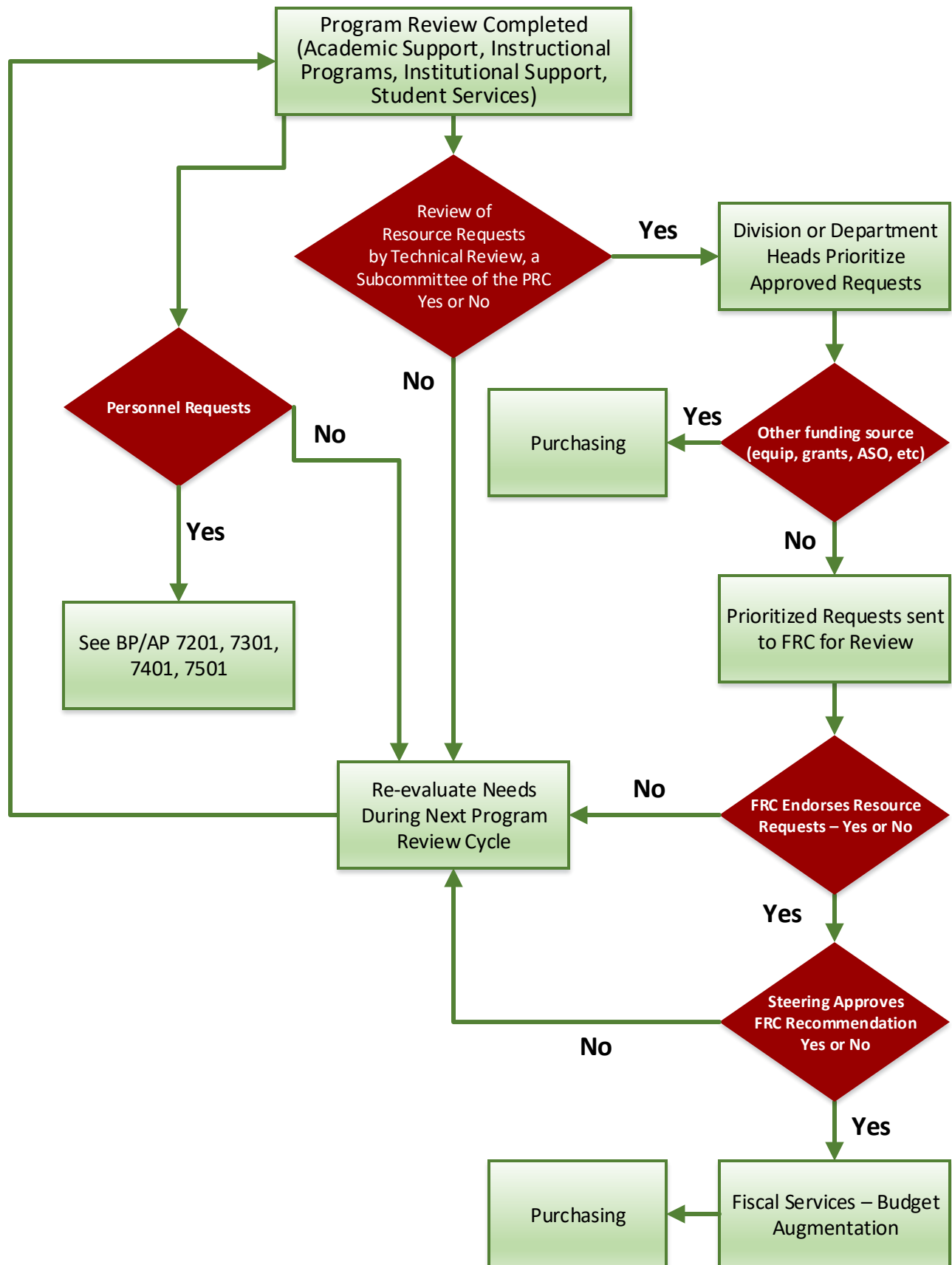


AA = Academic Affairs
SS = Student Services
IS = Institutional Support
AS = Academic Support

Appendix B – Program Review Cycle: Comprehensive



Appendix C – Program Review Resource Request Process



Appendix D – Program Review Resource Request Process Narrative

I. Prioritization

Prioritization of resource requests is a key step in the planning process, providing a foundation for dialogue regarding resource allocation. Soon after program review reports are completed, a subcommittee of the Program Review Committee completes a technical review of each report to suggest improvements, as well as verify completeness. After program reviews are completed and reviewed, resource requests are prioritized by constituents at the division, department or operational level. The following describes the prioritization process for each area of the college:

A. **Instructional Programs (fall):**

Resource requests are prioritized into a master list by division in November that includes each of the following areas: staff (certificated and classified), staff development, facilities, computers and software, equipment, and supplies. Once all divisions have prioritized requests, academic affairs (the vice president and all deans) prioritize requests into a master list. The requests may be funded through many different mechanisms, which will be addressed in the next section of this narrative. In order to close the loop for resource requests from the previous year, academic deans share the final ranked requests and funding sources with their area faculty and staff prior to/at the time of the new prioritization.

B. **Academic Support (spring):**

During summer, resource requests are prioritized into a master list by division that includes each of the following areas: staff (certificated and classified), staff development, facilities, computers and software, equipment, and supplies. Once all divisions have prioritized requests, academic affairs (the vice president and all deans) prioritize requests into a master list. The requests may be funded through many different mechanisms, which will be addressed in the next section of this narrative. In order to close the loop for resource requests from the previous year, academic support deans share the final ranked requests and funding sources with their area faculty and staff at the time of the new prioritization.

C. **Student Services (fall):**

Program reviews are submitted in early fall and shared/reviewed at an annual planning retreat. Each program prioritizes resource requests within their program review. In mid-fall, student services (the vice president and all deans) prioritize a master student services resource request list, which is then submitted for funding consideration by the Financial Resources Committee or other funding sources.

D. Institutional Support (spring):

Prioritization varies by area. In finance and administrative services, the vice president meets with directors to discuss completed program reviews. If resource requests are included, they are prioritized through this discussion process. In human resources, the director meets with staff members and prioritizes the requests during program review discussions. In technology and computer services (TeCS), the chief information services officer meets with staff members and reviews the requests in light of the Strategic Plan and the Technology Master Plan. In Institutional Research, Planning and Effectiveness (IRPE), the director meets with staff members and prioritizes the requests during the program review discussions.

II. Funding Sources/Mechanisms

Funding may be allocated for requested resources in a variety of ways. Program review funds awarded by the Financial Resources Committee represent one-time funds allocated annually by the board of trustees through the adopted budget process. The amount may vary annually and all programs may be eligible to receive funding through this mechanism. Academic affairs funds some instructional equipment requests either directly or by allocating amounts to each division. Funds may also be utilized according to equipment/supply budgets, which vary by division. Citrus College Foundation grants and categorical/grant funding represent another possible funding source for resource requests.

III. Financial Resources Committee

This participatory governance committee reviews and takes action on funding program review-related requests utilizing the one-time funds allocated by the board of trustees. Resource requests are often funded by other mechanisms before the Financial Resources Committee receives the prioritized lists. Items remaining unfunded are submitted for funding consideration by the Financial Resources Committee. Areas or departments whose requests are granted funding are notified of the award and amount via letter, after approval by the Steering Committee.

IV. Staff Requests – Faculty

Instructional and student services programs (including counseling, the Student Health Center, and the Hayden Memorial Library): New faculty positions are requested in annual program reviews and reflect program growth, retirements and/or separations. Additionally, faculty and the dean submit a completed full-time faculty request proposal, which is reviewed by the Faculty Needs Identification Committee (FNIC) in October of each academic year. Any proposals that are not also referenced in the annual program review are not considered. FNIC prioritizes all proposals and makes recommendations, which are forwarded to the superintendent/president for input. Finalized recommendations are then submitted to the next board of trustees' agenda for action.

V. Staff Requests – Classified and Management

New or replacement classified staff positions may also be requested/documentated in annual program reviews. Most often, positions will be considered by the superintendent/president's cabinet through an evidence-based proposal so that departments are not without staff for extended periods of time. New positions linked to a newly discovered need or new program development may be included in program review.

A. Instructional Programs (fall):

Once all divisions have prioritized requests (by November), academic affairs prioritizes them into a master list. Deans prepare evidence-based proposals to present to the superintendent/president's cabinet for discussion and approval.

B. Academic Support (spring):

Deans and the vice president of academic affairs prioritize all classified/management positions recommended in annual program reviews. Deans prepare evidence-based proposals to present to the superintendent/president's cabinet for discussion and approval.

C. Student Services (fall):

Deans and the vice president of student services prioritize proposed classified staff positions based upon program review and other pertinent data. Consideration is based on whether the position is required to fulfill a mandate or if it is for program support. Proposed funding sources are also discussed in the prioritization. Positions forwarded to the superintendent/president's cabinet for discussion and approval are supported with an evidence-based proposal.

D. Institutional Support (spring):

Vacant staff positions often need to be replaced outside of the program review cycle. They are brought to the attention of the vice president of finance and administrative services by area leads. Staff requests for areas directly under the superintendent/president (Human Resources, the Citrus College Foundation, TeCS, Communications and External Relations and IRPE) are brought directly to the attention of the superintendent/president and discussed at the superintendent/president's cabinet meetings.

Citrus College Board of Trustees

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