



Integrated Planning Manual 2017 - 2018

Sixth Edition

Citrus College
1000 West Foothill Boulevard
Glendora, California 91741-1885

www.citruscollege.edu

MISSION STATEMENT

Citrus College provides innovative educational opportunities and student support services that lead to the successful completion of degrees, transfer, career/technical education and basic skills proficiency. The college fosters personal and professional success through the development of critical thinking, effective communication, creativity, and cultural awareness in a safe, accessible and affordable learning community. 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 STATEMENT

Citrus College will provide excellent educational opportunities that are responsive to the needs of the community and help students meet economic, social, and environmental challenges to become active participants in shaping the world of the future.

VALUES

- *Student Focus*
- *Excellence*
- *Collaboration*
- *Diversity*
- *Life-Long Learning*
- *Integrity*
- *Technological Advancement*

Completion Pledge - Call to Action in Support of Students

We believe the student success and completion agenda is the future of Citrus College.

We believe that completion matters and every student counts.

We believe in every student's potential and responsibility to succeed.

We believe the "open door" must not be a "revolving door."

We believe that community colleges are the gateways to the middle class and beyond.

We believe that community colleges are an invaluable economic engine driving the nation toward prosperity.

We believe that talented people working at Citrus College are ready to take on leadership roles.

We believe in changing institutional culture, from emphasis on access only to emphasis on access and success.

We commit to courageous conversations about diversity, equity, and evidence reflecting student success and institutional performance.

We commit to eliminating the attainment gaps that separate student groups.

We commit to acting on facts to make positive changes.

We commit to promoting faculty and staff development focused on evidence based educational practice.

We commit to providing development opportunities, for college administrators, trustees, faculty, staff, and students.

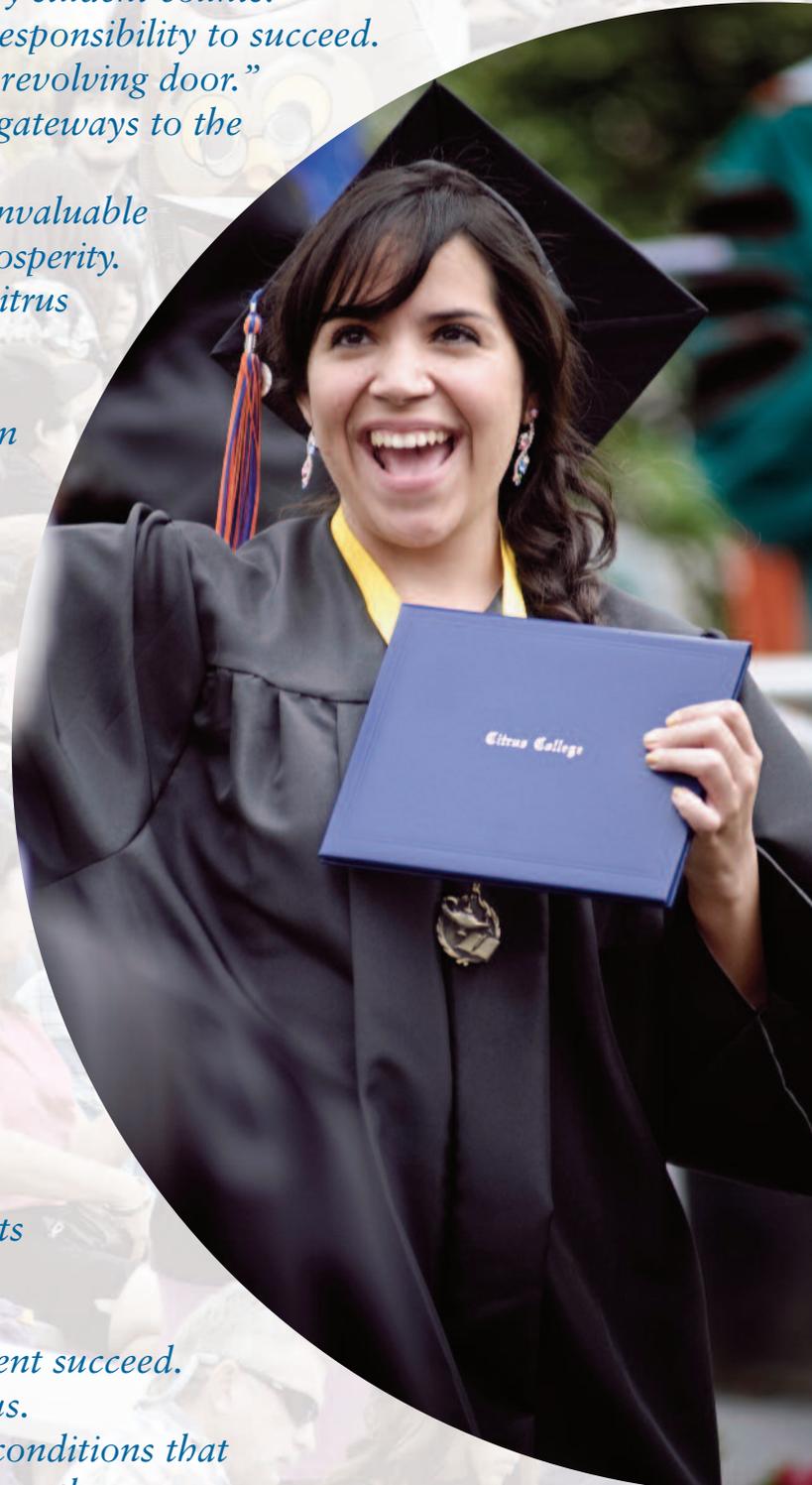
We ask every trustee, employee, and student organization to identify ways to help students understand the added value of degrees and certifications.

We ask every student to help one other student succeed.

We ask community members to work with us.

We ask elected officials to create the policy conditions that enable, support, and reward our work to strengthen student success.

We ask other community colleges to join us by signing this call to action.



Citrus College



**CITRUS COMMUNITY
COLLEGE DISTRICT
BOARD OF TRUSTEES**

It is my pleasure to present the sixth edition of Citrus College's Integrated Planning Manual. Thanks to the efforts of the Institutional Effectiveness Committee (IEC), the manual is reviewed and updated each year to ensure that it accurately reflects the college's current practices. With each edition, the Integrated Planning Manual more clearly demonstrates the college's culture of shared decision-making and our collective commitment to increasing student success and completion.

In addition to reviewing and updating the documentation of existing planning processes, Citrus College also works to continuously improve the process by soliciting critical feedback. In spring 2017, the IEC held a series of focus-group discussions to elicit input from instructional faculty regarding the program review process. Close to 30 faculty members participated, and they provided thoughtful comments and constructive ideas. To further promote college-wide awareness of the ACCJC accreditation standards, each of the Steering Committee's standing committees will now incorporate and index the corresponding accreditation standards in their annual purpose statements. Both of these practices demonstrate our commitment to planning that is meaningful, inclusive and targeted.

A useful addition to the 2017-2018 Integrated Planning Manual is a flow chart that depicts the resource allocation process. The flow chart, which was developed by the Program Review Committee, includes a narrative that explains the various steps in the process. It can be found in the Appendix on page 20.

In the strictest sense, "integrated planning" means that all college planning is part of a functional system unified by a common set of assumptions and well-defined procedures dedicated to the continuous improvement of institutional effectiveness. At Citrus College, integrated planning also means providing a framework that will allow the entire college community to work together in an effort to promote student success and completion.

I am confident that the Citrus College Integrated Planning Manual will facilitate the advancement of our college mission, vision and values.

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

Dr. Barbara R. Dickerson
President
Azusa and portions of
Duarte Representative

Dr. Patricia A. Rasmussen
Vice President
Glendora and portions of
San Dimas Representative

Mrs. Joanne Montgomery
Clerk/Secretary
Monrovia/Bradbury and
portions of Duarte
Representative

Dr. Edward C. Ortell
Member
Duarte and portions of
Azusa, Monrovia, Arcadia,
Covina and Irwindale
Representative

Mrs. Susan M. Keith
Member
Claremont and portions of
Pomona and La Verne
Representative

Ms. Yachi Rivas
Student Trustee

Dr. Geraldine M. Perri
Superintendent/President

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Introduction

The purpose of the *Citrus College Integrated Planning Manual* is to guide integrated institutional planning by describing the ways that the constituent groups of Citrus College participate in and contribute to college planning. This manual describes the relationships among the key planning functions of Citrus College and their connections to institutional adherence to accreditation standards.. This document complements the Organization and Governance Handbook which provides an overview of the participatory decision-making structures in place at Citrus College.

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 annually.

This version of the manual was approved by IEC on May 22, 2017.



Integrated Planning Model

In integrated planning, all college planning is part of a functional system unified by a common set of assumptions and well-defined procedures dedicated to the 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 (ACCJC). 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 critical focus areas.

The focus areas direct the college's energies and resources. From these focus areas, institutional goals and strategic objectives are identified. Responsibility for the achievement of these goals and objectives is assigned to the appropriate college divisions that, in turn, incorporate the goals 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 institutional support plans (Human Resources Plan, Sustainability Plan, and Technology Plan) are developed to meet the other aligned goals and objectives from the Strategic Plan.



As depicted on the planning model flow chart on the following page, dialogue regarding the improvement of institutional effectiveness occurs in an ongoing and systematic cycle of evaluation. Assessment plans focus on the Strategic Plan, which provides institutional goals and strategic objectives and guides the development of program/department/division plans to achieve those institutional goals and strategic objectives. These are linked to the resource allocation processes that also connect college resources to the institutional goals and strategic objectives. The Strategic Plan further guides development of implementation plans, which lead to assessment. Assessment findings then inform program improvement plans and the next cycle of planning begins.

INTEGRATED PLANNING MODEL

An ongoing and systematic cycle of evaluation 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 meet those goals and objectives from the strategic plan not addressed in the Educational and Facilities Master Plan

Human Resources Plan
Meets the strategic objectives aligned with Human Resources

Technology Plan
Guides the implementation of technology at the college

Sustainability Plan
Actualizes the strategic objectives regarding sustainability

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

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

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

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

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

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

Plan Implementation
Manages timelines, assesses levels of success, and reports activities and results

Assessment
A systematic process to document progress, review planning components and make modifications

Program Improvement
Uses assessment findings to make necessary changes which prompt the next cycle

Mission, Vision, Values

Purpose	Serves as the basis for all college planning Describes the college's intended student population and the services the college promises to provide to the local community
Process	<ul style="list-style-type: none">○ Reviewed as a first step in the development of a new strategic plan○ Includes opportunities for input from all college constituencies○ 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 Approved by the Superintendent/President Recommended to the 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, measurable objectives and focus areas that are the foundation for all other college plans
Process	<ul style="list-style-type: none">○ Initiate dialogue and deliberation by all constituencies of data from internal and external environmental scans that identify sources of opportunities and challenges○ Develop focus areas, institutional goals, and strategic objectives○ Develop links between collegewide focus areas, institutional goals and applicable college plans, including but not limited to: 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 Approved by the Superintendent/President Recommended to the Board of Trustee



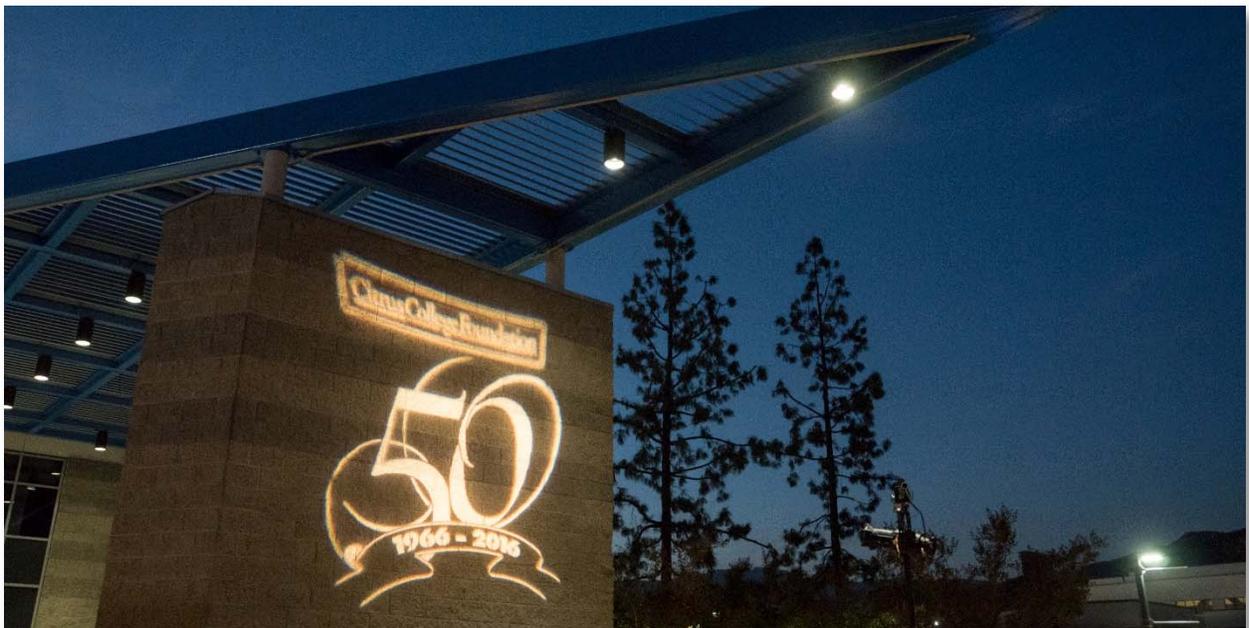
Board Goals

Purpose	Identifies Board of Trustees' role in accomplishing institutional goals and strategic objectives
Process	<ul style="list-style-type: none">o Review Strategic Plan focus areas and institutional goalso Identify sources of Board of Trustees' opportunities and challengeso 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



Educational and Facilities Master Plan

Purpose	<p>Charts the college's long-term course toward accomplishing its mission, vision, and values</p> <p>Sets the foundation for the Facilities Master Plan</p> <p>Focuses on change and improvement</p>
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○ Include the focus areas, institutional goals, and strategic objectives assigned to Academic Affairs and Student Services○ Include opportunities for input from all college constituencies
Timeline	<p>Developed every 10 years</p>
Initiation/Completion	<p>Initiated by the Superintendent/President and completed by the Steering Committee, or the designated ad hoc committee</p>
Recommendations to	<p>Steering Committee</p> <p>Approved by the Superintendent/President</p> <p>Recommended to the Board of Trustees</p>



Institutional Support Plan: Sustainability Plan

Purpose	Actualizes the strategic objectives regarding sustainability as outlined in the Sustainability Plan
Process	<ul style="list-style-type: none">○ Analyze existing projects completed to date○ Identify potential projects that present a value to capture○ Encourage collegewide participation○ Encourage an attitude of behavior modification as it relates to sustainable practices○ Implement projects that are economically viable○ Track utility resource usage, compile data, and set goals for usage reduction○ Report back to the Sustainability Committee, the Physical Resources Committee, and the Board of Trustees
Timeline	Reviewed annually
Initiation/Completion	Initiated by the Vice President of Finance and Administrative Services Completed by the Physical Resources Committee
Recommendations to	Steering Committee Approved by the Superintendent/President Recommended to the Board of Trustees



Institutional Support Plan: Technology Plan

Purpose	<p>Guides the implementation of technology at the college</p> <p>Responds to institutional goals 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">○ Analyze technology needs and requirements for the college including a SWOT (Strengths, Weaknesses, Opportunities, Threats) analysis focused on technology○ Include the Strategic Plan focus areas, institutional goals, and strategic objectives assigned to technology○ Incorporate technology requirements defined in the Educational and Facilities Master Plan○ Develop technology focus areas, planning goals, and related annual planning objectives○ Communicate the achievement of the institutional goals and strategic objectives each spring through the Strategic Plan Progress Report and every five years through the Institutional Support Program Review○ Communicate planning goals and objectives to the resources allocation process in support of funding requests
Timeline	<p>Developed every five years, with annual reviews and updates</p>
Initiation/Completion	<p>Initiated by the Chief Information Services Officer</p> <p>Completed by the College Information and Technology Committee</p>
Recommendations to	<p>Steering Committee</p> <p>Superintendent/President</p>

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">○ Develop and implement objectives○ Communicate the achievement of the institutional goals and strategic objectives each spring through the Strategic Plan Progress Report and every five years through the Institutional Support Program Review○ 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</p> <p>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 (ACCJC Rubric for Institutional Effectiveness – Part I: Program Review)

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 – Completions an annual Program Review Report. In the fifth year, a Comprehensive Program Review is completed and submitted to the Board of Trustees and posted publically
- Institutional Support Programs – Completes an annual Program Review Report. In the fifth year, a Comprehensive Program Review is completed and submitted to the Board of Trustees and posted publically
- Instructional Programs – Completes a Core Program Review Report and one of five “Plus One” addenda. In the fifth year, the Year Five: Program Overview and Summary report is submitted to the Board of Trustees and posted publically
- Student Services Programs – Completes an annual Program Review Report. In the fifth year, a Comprehensive Program Review is completed and submitted to the Board of Trustees and posted publically

Timeline	Five-year cycles of the annual and comprehensive program review reports are reviewed yearly by the Program Review Committee
Initiation/Completion	Initiated by the program review coordinator Reviewed by the Program Review Committee
Recommendations to	Program Review Committee Financial Resources Committee Steering Committee Superintendent/President Board of Trustees

A Program Review Resource Request Process flow-chart and narrative are provided as Appendix A and B respectively.



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 vacant positions or discontinued programs. 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 possible, the college will sustain an innovations fund to support faculty/staff ideas through a competitive mini-grant process funded by the Foundation.

Purposes	Allocates funds to support the college's institutional goals and strategic objectives
Process	Begins in March 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	Steering Committee Superintendent/President

Plan Implementation

Plan implementation is embedded in each component of the planning process described in this manual, and an individual or group is assigned responsibility to ensure plan implementation. The tasks of these responsible parties are to:

- Manage the timeline of the plan components;
- Assess the levels of success following plan implementation; and
- Report the activities and results to the appropriate individual and/or group.

Assessment

Assessment occurs at two levels in the Citrus College planning model. First, both the Strategic Plan and program reviews assess outcomes. At the institutional level, the Strategic Plan Progress Report is due at the end of each academic year to document achievements made for the objectives laid out in the corresponding Annual Implementation Plan. Annual program reviews document progress and outcomes assessed at the program/department/division level.

Second, the entire planning process is evaluated by the Institutional Effectiveness Committee (IEC) on an annual basis. The IEC will engage in a systematic process by reviewing the steps and components involved in planning and modifying all parts of the cycle, if necessary. Factors that may be examined include:

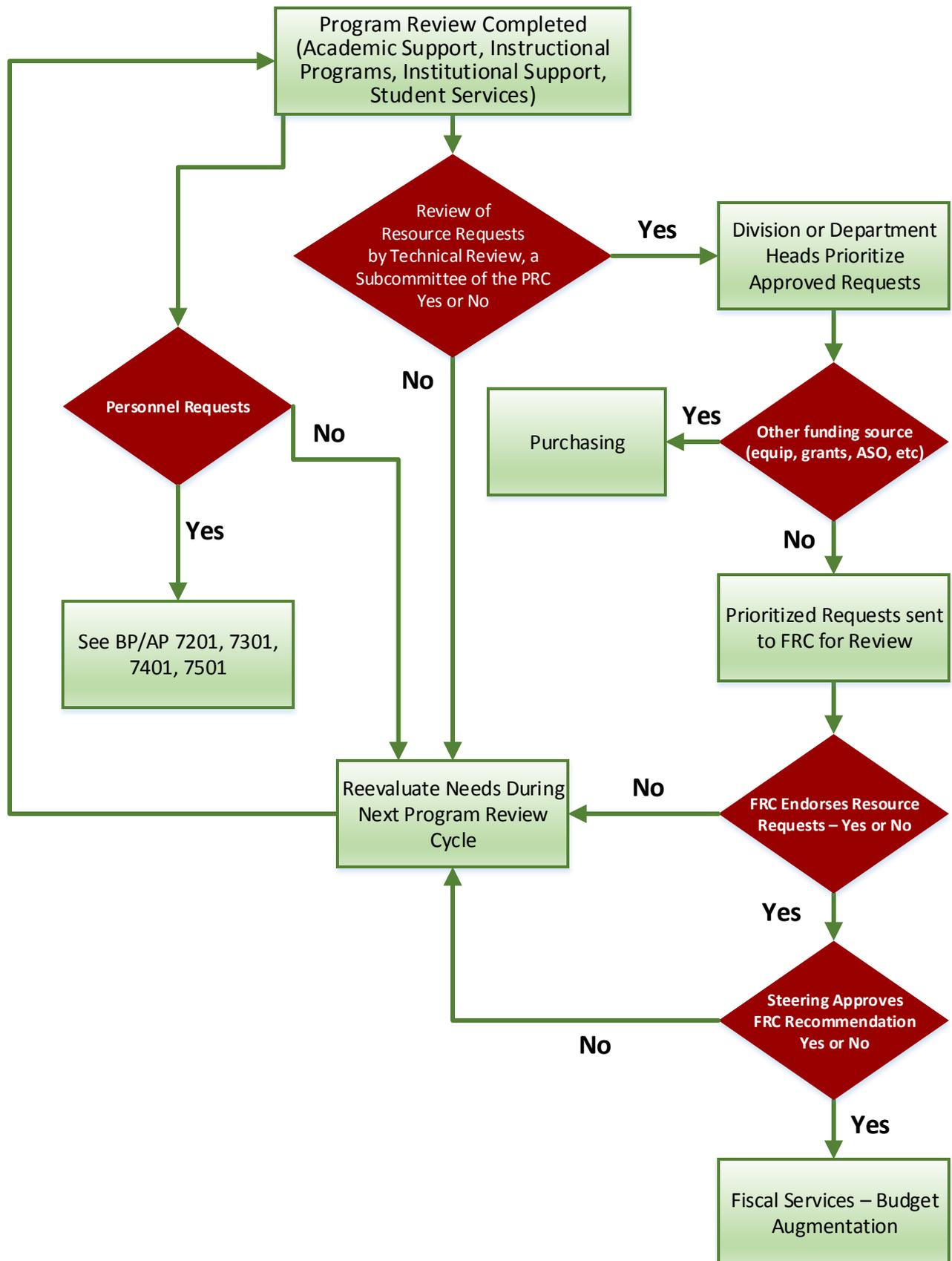
- Alignment of the Strategic Plan with other major plans and program review;
- Completion rate of the annual program reviews in all categories; and
- Implementation of assessment and usage of learning outcome assessment data in program review.

Program Improvement

The results of the program review assessments are used to improve programs by whatever means necessary, such as changes to policies, procedures, and curriculum. Changes designed to improve programs are documented in program reviews and the Strategic Plan Progress Reports.

Appendix A

Citrus College PROGRAM REVIEW RESOURCE REQUEST PROCESS



Appendix B

Citrus College Program Review Resource Request Process Narrative

I. Prioritization

Prioritization of resource requests is a key step in the planning process providing a foundation for dialog 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 which 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 which 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, the vice president of student services (VPSS) and deans prioritize a master Student Services resource request list which is then submitted for funding consideration by the Financial Resources Committee or by other funding sources.

D. Institutional Support (fall and spring):

Prioritization varies by area. In Financial 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 of HR meets with staff members and prioritizes the requests during program review discussions. In Technical and Computer Services, 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. 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. Resource requests are often funded by other mechanisms before the Committee receives the prioritized lists. Items remaining unfunded are submitted for funding consideration by the Committee. Areas or departments whose requests are granted funding are notified of the award and amount via letter.

IV. Staff Requests – Faculty

Instructional and Student Services programs (including Counseling, Student Health Center, and the Library):

New faculty positions are requested in annual program reviews and reflect program growth and/or 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 which 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/ documented in annual program reviews. Most often, positions will be considered by the 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 President's Cabinet for discussion and approval.

B. Academic Support (spring):

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

C. Student Services (fall):

All deans and the VPSS 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 for program support. Proposed funding sources are also discussed in the prioritization. Positions forwarded to the President's Cabinet for discussion and approval are supported with an evidence-based proposal.

D. Institutional Support (fall and spring):

Open 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 (HR, TeCS, IRPE), are brought directly to the attention of the superintendent/president and discussed at the President's Cabinet meetings.

Citrus College Board of Trustees

Dr. Barbara R. Dickerson, President
Azusa and portions of Duarte Representative

Dr. Patricia A. Rasmussen, Vice President
Glendora and portions of San Dimas Representative

Mrs. Joanne Montgomery, Clerk/Secretary
Monrovia/Bradbury and portions of Duarte Representative

Dr. Edward C. Ortell, Member
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