



## District Operations' Department Portfolios for Planning, Evaluation, & Resource Allocation

2009-2011

*(updated June 2010 to include mid-cycle evaluations)*

Planning and evaluation occur continuously throughout the Rancho Santiago Community College District. The “portfolio” process of departmental planning and evaluation represented within this publication is for district-wide support services departments.

Because planning, resource allocation, and evaluation are so closely related, and because these activities occur on an ongoing basis, we have developed a structure—the department portfolio—whereby these efforts can be addressed cohesively in one document for District Operations.

Each department creates a portfolio that describes its department, assesses its functions and services, identifies its annual goals that relate to the Board of Trustees’ vision and goals, and propose a department technology plan to compliment the work it produces. The cycle of evaluation encourages department staff to regularly assess their program and the manner in which the needs of their clients/customers are addressed in order to maximize the department’s strengths and implement improvements wherever possible.

These portfolios prove to be a tool for departments to plan, as a unit, how to use their resources (human, fiscal, facilities), thereby operating in a more efficient manner to serve our constituents/customers/clients. This effort (along with those at Santa Ana College and Santiago Canyon College) is also integrated into our district-wide resource allocation process that takes place annually.

To be an effective tool, departments must use the planning portfolio as a guide for department activities throughout the 2-year period. Each department set the goals that they want to achieve in June 2009. During the next twelve months, they implement the activities/processes necessary to achieve their goals. In June 2010, staff again evaluated their goals and take stock to ensure that they will be able to complete the remaining goals in the coming year. We acknowledge that the current fiscal instabilities have caused many departments to question if they will be able to achieve their goals. However, we encourage staff to think outside-of-the-box for strategies as the directions of our work should not be compromised. Departments will again revisit the portfolios in June 2011 to wrap up this cycle and plan for the next 2-year cycle.

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Public Relations & Governmental Relations  
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# Rancho Santiago Community College District

## District Operations Planning Portfolio

2009-2011



### Auxiliary Services

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Department

*Update (June 2010)*

ORG. CHART

FUNCTIONS

GOALS

TECH  
PLAN

BUDGETS

SELF-  
STUDY

RECOM  
MEND.



ORG. CHART

FUNCTIONS

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MEND.



## Portfolios for Planning

The purpose of the RSCCD portfolios is to provide an instrument for department planning, evaluation, and resource prioritization that is streamlined and that coordinates those related activities.

In good practice, planning processes are cyclic, and priorities for resource allocation result from the identification of goals. That is, evaluation, or program review, conclusions are used to identify future goals; those goals are used for budgeting. After plan implementation, further evaluation results in refined, revised plans, and so forth.

The portfolio process is designed to enhance the cohesion of planning-related activities as well as to allow for maximum customization of planning and evaluation activities for each unique support services department.

The portfolios should be maintained on an ongoing basis, with goals and budgets being updated each year. In this way, the portfolio can be used as a source document for resource allocation requests when needed.

ORG. CHART

FUNCTIONS

GOALS

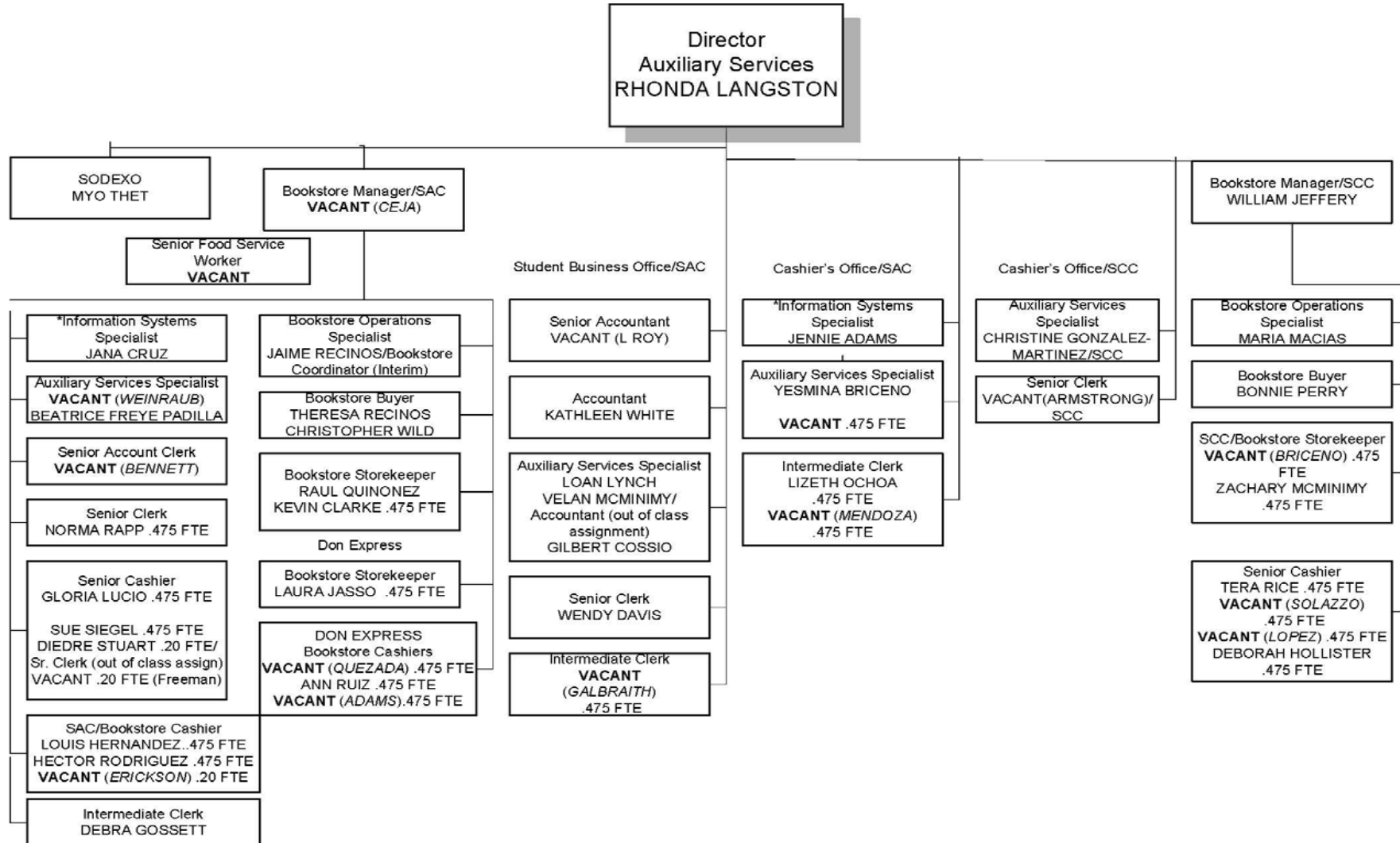
TECH  
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MEND.

# Organization Chart



ORG. CHART

# Functions

## Functions and services provided by the department:

### **AUXILIARY SERVICES**

- Responsible for the collection and accounting of monies for all District related tuition, fees and special events, including student body funds.
- Maintains and operates a staff and student photo ID system.
- Facilitates the processing of warrants and performs general accounting for the Associated Students, Bookstore, Community Education and Diversified.
- Ensures compliance with accounting and documentation standards to control receipt and disbursement of all auxiliary funds.
- Develops cash handling guidelines and establishes policies and procedures to ensure the fiscal integrity of funds.
- Has district-wide responsibility and coordination of all Bookstore and Food Services operations including: vending (beverage & snack), coffee carts, and catering truck contract management.

### **BOOKSTORE**

- Provide the necessary educational tools to serve and benefit the students, faculty and staff at all college locations including textbooks, course supplies, and office supplies.
- Initiate and coordinate with faculty and other personnel the acquisition of textbooks, supplies and special related material required for instructional programs.
- Conduct opening and closing buy back of used books at least four times per year and expand to off-campus sites and locations when possible.
- Purchase supplies and emblematic clothing and soft goods to meet the needs of all students and the community.
- Order announcements and graduation attire for all graduates, faculty and staff participating in commencement.
- Maintain accounting records for special students programs including EOPS book grants, Department of Rehabilitation vouchers, scholarships, Veterans Administration, and other student support programs established by the Associated Student Government.
- Operate the “Don Express” convenience store and continue to expand express services to other college sites and centers.
- Initiate capital projects and building improvements to enhance and expand existing facilities in response to the expanding needs of the District.

**FUNCTIONS**



### **CASHIER'S OFFICE**

- Collection of fees and processing of refunds for: registration fees, parking, health, student ID fee, material fees, non-resident tuition and enrollment fees for walk-in, webs (on line) off-campus sites.
- Photo imaging and fee collection for staff and student identification (ASB ID and staff ID)
- Accounts receivable and billings for student tuition and scholarships.
- Direct office phone and counter support for inquiries related to registration, including administrative holds on student records.
- Returned check collection for all district funds (Clearing, Bookstore, Community Education, and Diversified.)

### **FOOD SERVICE**

- Provide food service delivery system to meet the needs of students and staff, including catering for college sponsored meetings, events, activities and programs, and special services to accommodate community and student sponsored events.
- Contract management of campus dining and catering services, vending services (beverage and snack), catering truck operations and general support services to the district office, colleges, sites, centers, and child development centers.

### **STUDENT BUSINESS OFFICE**

- Collection of non-registration fees: lab breakage, library fines, testing, CED, custodial supplies, lost keys, parking money.
- Sale of faculty and staff parking stickers, gate and elevator cards
- Disbursement of financial aid checks and staff and faculty payroll checks (at SAC and SCC)
- Administration of book loan programs and emergency loans.
- Sale of amusement tickets: movie theaters, amusement parks and other entertainment.
- Preparation and disbursement of change funds for college events and sales.
- Process deposits for funds collected, issue receipts and classify accounts for input in Accounting Department.
- Collection of deposits for Associated Student Funds, Diversified Funds, and Community Education Funds.
- Handle Golden state scholarships and EOPS disbursements.
- Process payment of all invoices, purchase orders, reimbursements for all auxiliary funds, verifying proper documentation.
- Maintains liaison with vendor, community and district colleges, sites and centers.
- Reconciles bank accounts for Associated Students, Community Ed, Diversified Funds, and Bookstore Funds.
- Ensures compliance with accounting and documentation standards to control receipt and disbursement of funds.
- Confers and meets with student body, faculty and administration in the development of budgets under the auspices of Auxiliary Services and provide financial guidance relevant to expenditures and budget administration.
- Confers and coordinates with VP's of Administrative Services at each college, the Assistant VP of Fiscal Services, and the independent auditors regarding the auditing of Auxiliary Funds.

**FUNCTIONS**

# Functions

## Customers and recipients of services:

- All district divisions and departments
- Public requesting information
- Federal, State and local agencies
- Student clubs and organizations
- Students
- Faculty and staff

FUNCTIONS

# Goals

1. Annual goals (including staff development goals) – created at beginning of each school year
2. Progress towards goals – created at end of each school year
3. Other accomplishments – created at end of each school year

GOALS

## Goals for years 2009-2011

GOAL	Responsible Person(s)	Completion Date	Resource Needs
Strengthen internal controls and fraud prevention systems for Auxiliary operations by developing and establishing policies and procedures to ensure fiscal integrity of funds.	Rhonda Langston Jaime Recinos Bill Jeffery Jennie Adams		
Implement the Datatel Student system in cashiering operations to include over-the-counter cashiering and secure web payment capability and fully auditable internal controls. Provide training opportunities for staff.	Rhonda Langston Jaime Recinos Bill Jeffery Jennie Adams		
Analyze and review of Bookstore Strategic Plan. Continue to enhance the use of technologies in the Bookstore operation to meet the demands of evolving electronic communications in the areas of publishing and retail operations. Offer E-Books and Pilot textbook rental program.	Rhonda Langston Jaime Recinos Bill Jeffery		
Continue participation on textbook task force to provide strategies to lower the cost of textbooks for students and educate faculty on strategies for ordering and adopting textbooks.	Rhonda Langston Jaime Recinos Bill Jeffery		
Enhance communication with student organizations, faculty, and staff through increased staff participation in committees, attendance at district-wide events and student sponsored activities and by the use of surveys and focus groups.	Rhonda Langston Jaime Recinos Bill Jeffery Jennie Adams		
Establish and maintain a quality customer service program by providing professional training sessions, partnering with other colleges and by attending national, state, and regional conferences and educational sessions.	Rhonda Langston Jaime Recinos Bill Jeffery Jennie Adams		
Review and assess the Food Service operation and develop a strategic plan to provide a quality, reasonably priced, comprehensive food service program	Rhonda Langston		

**GOALS**

## Progress Toward Goals (to be completed in June 2010)

2009-2011 Goals	Progress Rating 1 – 10 (10 = completed)	Comments
Strengthen internal controls and fraud prevention systems for Auxiliary operations by developing and establishing policies and procedures to ensure fiscal integrity of funds.	8	We are continuing to assess areas of risk and enhance policies and procedures utilizing the District's external auditors as a resource. Attendance at Professional Development Workshops on PCI compliance, credit card processing and streamlining our payment processes. Integrating Datatel components with FA, A&R, EOPS and other departments district-wide to ensure proper internal controls. Installed Bay Security access control system and monitoring in Cashiering Offices and Student Business Office.
Implement the Datatel Student system in cashiering operations to include over-the-counter cashiering and secure web payment capability and fully auditable internal controls. Provide training opportunities for staff.	10	The Datatel student system is 100% functional. We have implemented approximately 80-90% of all applications and will continue to implement as new applications arrive (i.e. FA/Bookstore vouchers). Training has been completed with ongoing staff and will continue for peak periods for short-term hires.
Analyze and review of Bookstore Strategic Plan. Continue to enhance the use of technologies in the Bookstore operation to meet the demands of evolving electronic communications in the areas of publishing and retail operations. Offer E-Books and Pilot textbook rental program.	8	Digital E-Books introduced at SCC in Spring 2010. SAC expanded E-Book offerings Spring 2010. Decision to upgrade Nebraska Book Company POS system to a Windows based version will allow further development of rental program offered by NBC beginning Fall 2010. Purchase of the financial aid software enhancement will get books to FA students at the start of the semester for the first week of classes. The basic skills pilot textbook rental program was implemented, assessed, surveyed and proven to be advantageous to students. Installed Bay Security access control system and monitoring in both college bookstores.

**GOALS**

<p>Continue participation on textbook task force to provide strategies to lower the cost of textbooks for students and educate faculty on strategies for ordering and adopting textbooks.</p>	<p>8</p>	<p>The textbook task force was an ad-hoc committee which met regularly over the past year. The task force is now meeting quarterly and has greatly enhanced communication to faculty, deans and students. The bookstores continue to be a liaison to the academic divisions and departments as a resource. Both managers actively promoted lowering the cost of textbooks through flex activities, division meetings and a variety of other activities and included the Associated Students Governments at both colleges.</p>
<p>Enhance communication with student organizations, faculty and staff, through increased staff participation in committees, attendance at district-wide events and student sponsored activities and by the use of surveys and focus groups.</p>	<p>8</p>	<p>We continue to proactively improve communication through participation with student organizations, committees, and attendance at district-wide and student-sponsored events. We have used surveys and focus groups to gain greater insight and assess needs.</p>
<p>Establish and maintain a quality customer service program by providing professional training sessions, partnering with other colleges and by attending national, state, and regional conferences and educational sessions.</p>	<p>8</p>	<p>Auxiliary Services has been highly successful in maintaining quality customer service by training staff, providing videos, training sessions and participation at regional conferences (i.e. customer service strategies). We have partnered with other professionals and colleges to share information regarding how to treat customers, never say "No", and follow the "Disney Service model" for extraordinary customer service.</p>
<p>Review and assess the Food Service operation and develop a strategic plan to provide a quality, reasonably priced, comprehensive food service program</p>	<p>8</p>	<p>We have been extremely successful in implementing our goals by providing the following: "No Frills" catering, "Grab and Go" prepackaged food items and healthy choice options. The Halo POS system for debit and credit cards was implemented and has increased sales and created efficiency for students to move through the cashiering lines. Held Expectations Focus Group meetings to develop short-term (6 months- 1 year) and long term goals in response to feedback from faculty, staff and students. Goals have been written up and will be followed with a strategic plan for implementation.</p>

**GOALS**

## Accomplishments

Cashiering staff and accounting support staff setup, tested, and implemented the Datatel student module with the help of the Information Technology Department and Fiscal Services.

Cashiering and Auxiliary staff with the help of ITS selected, tested and implemented a new and improved comprehensive photo ID system at SAC and SCC (CI Solutions) that is compatible with Datatel and has future capability to integrate with OCTA for bus passes. It is currently used for lab attendance, student and staff identification and has the ability to be used as a declining balance card in the future.

The Bookstore staff collaborated to create a district-wide "Textbook Taskforce" and implemented a new book rental program. Enhance digital book offerings. Ungraded the Nebraska Prism POS system and enhance security controls by updating surveillance and access control with Bay Security with monitoring capability. Initiated capital projects and building improvement for existing facilities at SAC and SCC in compliance with OC Health Department requirements.

Implemented new healthy choice food selections, on-line marketing and promotion program, installed new signage, purchased new POS cash registers with debit card capability. Replaced old equipment and created sustainability through recycling cardboard and replaced plastic with green material. Placed catering menu on-line (selections and contract). Held focus groups with students, faculty and staff to obtain feedback and establish goals for upcoming year. Prepared and submitted a docket item and contract to extend the contract with Pepsi for a 5-year term that provided greater financial commissions.

GOALS

# Department Technology Plan

Include software, hardware, and training needs.

Continuous upgrade and replacement plan for computer hardware, printers, and software for Bookstore Operations, Cashier Office, and Student Business Office functions.

## Bookstore POS (Point of Sale System)

- Perpetual Inventory
- On-line cashiering
- Provide scholarship, EOPS, and Financial Aid module for electronic student account record.

## Datatel Financial & Student System

- Implement an over-the-counter cashiering system
- Provide telephone and secure web payment capability – official payments
- Provide auditable internal controls

## Upgraded or New Student/Staff Photo ID System

- CI Solutions – lab attendance, integrated with Datatel
- Provide decentralized system for colleges, sites and centers and district office HR Department
- Purchase portable camera for use at Continuing Education sites and for “peak” registration periods

## Training Needs:

- “User Group” attendance and training (Nebraska Prism and Datatel Consultants)
- On-going training of staff on new system for financial aid, A&R, Continuing Education

TECH  
PLAN



# Budget and Expenditures

Object Code	2008-2009		2009-2010		2010-2011	
	Budgeted	Expended	Budgeted	Expended	Budgeted	Expended
1000 – Academic Salaries	0	0	0	0	0	0
2000 – Classified Salaries	672,338	614,815	596,534	596,534	596,534	596,534
3000 – Employee Benefits	265,410	235,075	277,220	277,220	277,220	277,220
4000 – Books and Supplies	35,000	32,028	20,000	20,000	20,000	20,000
5000 – Services & Other Operating Exp	0	0	0	0	0	0
6000 – Sites, Buildings, Books & Equip.	27,000	21,956	15,000	15,000	15,000	15,000
7000 – Other Outgo	0	0	0	0	0	0
<b>TOTAL</b>	999,748	903,874	908,754	908,754	908,754	908,754

General Fund

**BUDGETS**

# Budget and Expenditures

Object Code	2008-2009		2009-2010		2010-2011	
	Budgeted	Expended	Budgeted	Expended	Budgeted	Expended
1000 – Academic Salaries	0	0	0	0	0	0
2000 – Classified Salaries	1,242,837	1,123,555	1,242,837	1,242,837	1,242,837	1,242,837
3000 – Employee Benefits	382,213	344,893	382,213	382,213	382,213	382,213
4000 – Books and Supplies	6,950,000	6,218,587	6,500,000	6,500,000	6,500,000	6,500,000
5000 – Services & Other Operating Exp	390,000	320,996	284,350	284,350	284,350	284,350
6000 – Sites, Buildings, Books & Equip.	100,000	48,403	50,000	50,000	50,000	50,000
7000 – Other Outgo	4,494,414	200,600	4,573,553	200,000	4,573,553	200,000
<b>TOTAL</b>	13,559,464	8,257,034	13,032,953	8,659,400	13,032,953	8,659,400

Bookstore Fund

**BUDGETS**

# Budget and Expenditures

Object Code	2008-2009		2009-2010		2010-2011	
	Budgeted	Expended	Budgeted	Expended	Budgeted	Expended
1000 – Academic Salaries	0	0	0	0	0	0
2000 – Classified Salaries	268,933	225,729	268,933	268,933	268,933	268,933
3000 – Employee Benefits	66,898	59,581	66,898	66,898	66,898	66,898
4000 – Books and Supplies	0	0	0	0	0	0
5000 – Services & Other Operating Exp	1,175,769	965,594	1,164,769	1,164,769	1,164,769	1,164,769
6000 – Sites, Buildings, Books & Equip.	169,000	136,329	85,000	85,000	85,000	85,000
7000 – Other Outgo	283,443	0	555,706	0	555,706	0
<b>TOTAL</b>	1,964,043	1,387,233	2,141,306	1,585,600	2,141,306	1,585,600

Diversified Trust Fund

**BUDGETS**

# Self-Study

## Self-study standard questions:

1. How do persons served by the program evaluate its adequacy, efficiency, and effectiveness?

Through the use of surveys, focus groups, ad hoc committee attendance, and performance evaluations. Departments have also attended local, state and national educational sessions for their specific area. Feedback is also given in the District Master Plan and the Student Satisfaction Survey.

2. Are the services comparable in quality and scope to those offered by similar programs at other colleges?

Auxiliary Services is comparable in quality and scope in relation to a self-operated bookstore operation, a contracted food service and cashiering, photo ID and student business office functions. Other districts vary in size and scope and may have multiple offices and managers depending on number of sites and centers.

3. What efforts does the program make to continually upgrade its services?

Regular staff meetings with customer service approach to doing business. Continuous liaisons with student service departments and academic divisions. Surveys and focus groups are also used to obtain feedback and to upgrade services.

4. How much progress has been made towards program goals?

Annual goals established and evaluated. See attached goals with completion dates.

SELF-  
STUDY

# Self-Study

## Self-study standard questions:

5. What are the strengths and weaknesses of the program?

### Strengths

The people and customer service orientation that we practice in our departments.

We have a high degree of efficiency and the ability to accommodate large volumes of students through cashier/photo ID, bookstore and food service during peak periods.

### Weaknesses

The automation of services through technology and software systems to provide retail and cashiering capability at any time of the day or night through web on-line technology, face-book.

The freeze on hiring and the reduction in force has weakened the services.

6. How successful has the department been in obtaining grants?

We have successfully worked with Administrators at SAC and SCC to provide Basic Skills Grant money to underwrite a small textbook rental pilot program.

We are pursuing further efforts to apply for state and federal grants to generate funds for expanding the textbook rental program and offerings.

7. What are future trends expected to impact resource development?

Not applicable.

SELF-  
STUDY

# Recommendations

RECOM  
MEND.

# Rancho Santiago Community College District

## District Operations Planning Portfolio

2009-2011



### District Safety and Security

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Department

*Update (June 2010)*

ORG. CHART

FUNCTIONS

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## Portfolios for Planning

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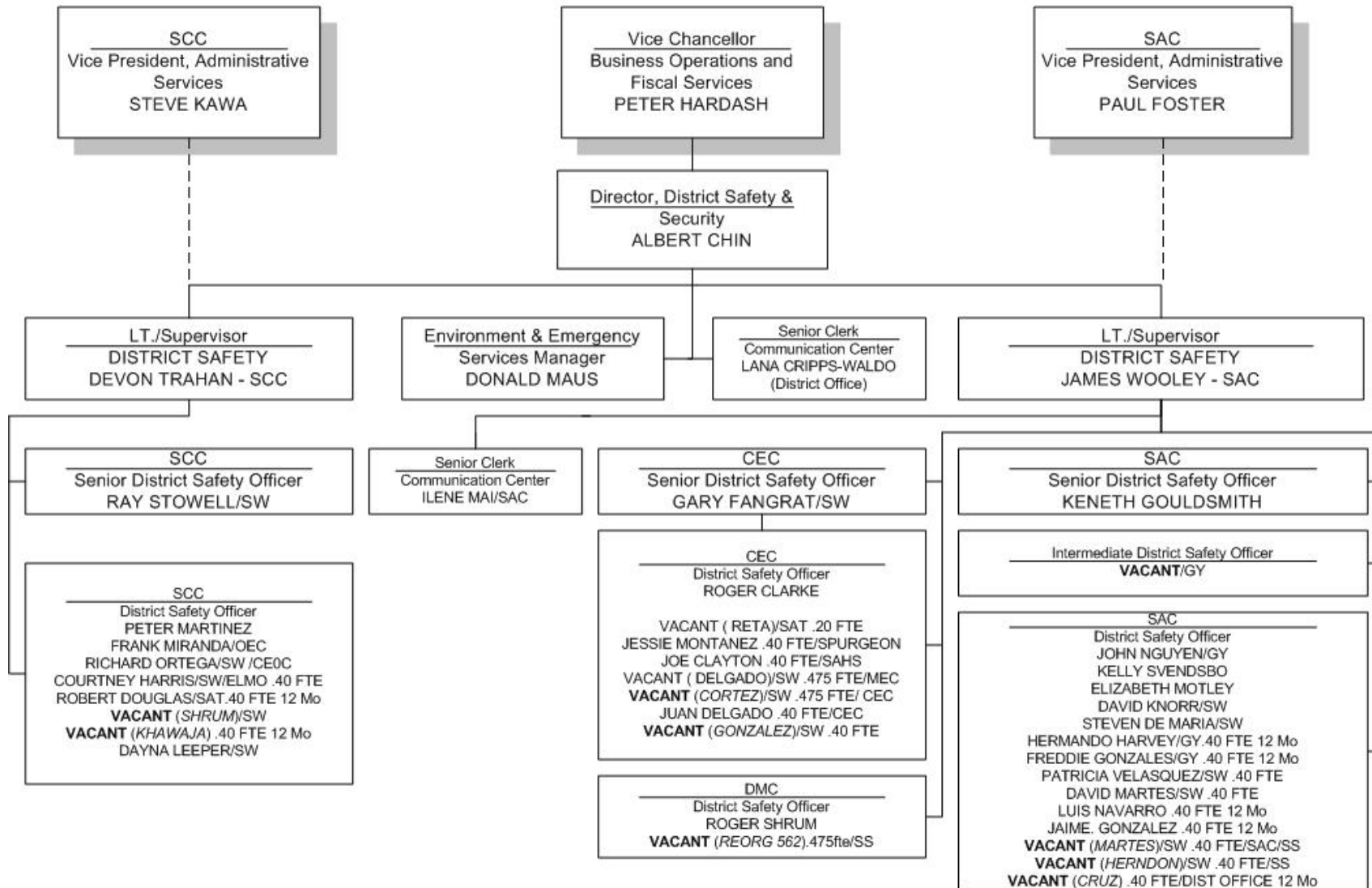
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# Organization Chart



ORG. CHART

# Functions

## **Functions and services provided by the department:**

The purpose of the district safety and security department is to support the missions of the colleges, SAC and SCC, and the Rancho Santiago Community College District by providing a safe, secure and healthful learning and working environment for students, employees and guests at our facilities.

**The Director of district safety and security and the Supervisors/Lieutenants perform, or provide oversight of district safety officers and other staff who perform, these functions:**

1. Assign and schedule district safety officers (DSO's), unarmed and non-sworn uniformed security personnel, to both colleges and their sites and centers to ensure adequate and appropriate security coverage.
2. DSO's patrol campuses effectively and visibly to deter crime and to be available to provide assistance, information, directions and safety and security related services to students, employees and guests.
3. Respond to serious incidents and emergencies, providing first aid and CPR to injured or ill persons.
4. Respond to criminal incidents and other disruptive events rapidly and appropriately, making efforts to restore a peaceful environment. Request help from local law enforcement agencies when necessary.
5. Maintain accurate documents, records and reports about incidents, crimes, emergencies and daily activities.
6. Enforce parking and traffic regulations on campus to prevent accidents and ensure pedestrian and vehicular safety.
7. Provide security coverage for special events
8. Work with Administrative Services department and Maintenance and Operations staff to identify and correct safety hazards.

**FUNCTIONS**

## Functions

9. Monitor fire and life safety alarms systems and intrusion alarm systems to ensure proper functioning and to ensure timely response to alarm activations.
10. Coordinate information and efforts with student services staff, counseling staff and other site administrators to address student disciplinary problems and to prevent potentially violent activities.
11. Conduct crime prevention and awareness programs, develop and post safety alert bulletins to inform the campus of potential threats, provide safety awareness presentations to staff and student groups, provide email alerts and safety posters.
12. Monitor crime reports and direct increased patrols to locations where crimes occur
13. Liaison with local law enforcement agencies to ensure effective working relationships
14. Maintain effective Lost and Found Property program
15. Respond to changes in the environment at and around our campuses by recommending policy or procedural changes to improve safety and security of students and employees
16. Maintain the electronic access control/door locking system program at the district office, adjusting opening and closing times depending on needs
17. Monitor the HVAC system at the district office, and adjust the schedule to accommodate approved after hour and week-end activities. Work with Facilities staff to ensure proper functioning
18. Develop emergency communications plans

**FUNCTIONS**

## Functions

**The Environmental Safety and Emergency Services manager is primarily responsible for the following functions**

19. Develop, implement, administer, direct, monitor and evaluate programs needed to ensure a safe and healthful environment for employees, students and visitors at all district facilities
20. Liaison with CAL/OSHA and other regulatory compliance inspectors and participates in compliance inspections.
21. Develop, maintain and test emergency preparedness programs for the district and its sites.
22. Participate and provide leadership on safety committees at each college and site.
23. Manage the hazardous waste program district-wide.
24. Coordinate recycling efforts at Sac and the district office.
25. Serve as the Chemical Hygiene Officer for the district to ensure lab safety.
26. Perform, coordinate or oversee district-wide facilities inspection programs to ensure that hazards are identified and corrected and that risks are managed.
27. Provide training and staff development for employees on environmental health and safety and emergency preparedness programs.
28. Represent the district at the Orange County Emergency Management Organization (OCOMO)
29. Assists with development, implementation of emergency communications plans and provides employee training on emergency communications systems

**FUNCTIONS**

# Functions

## Customers and recipients of services:

Students

Employees

Visitors

FUNCTIONS

# Goals

1. Annual goals (including staff development goals) – created at beginning of each school year
  - Reduce criminal incidents throughout the district
  - Increase role in facilities planning to ensure that safety and security issues are considered
  - Increase parking enforcement at SAC and SCC
  - Improve department's key control system at SAC and SCC
  - Include customer service topics in department's training programs
  - Provide training to department staff in fire alarm systems, dealing with difficult people, workplace violence plans, first aid and CPR
  - Update emergency procedures manual to address after-hour needs: intrusion alarms, locations, operations, call-lists
  - Increase number of parking permit dispensers at SAC and SCC, upgrade to allow ATM and credit card functions
  - Ensure that scheduling of district safety officers is adequate to meet the changing needs of the colleges, sites and centers when budget decisions impact locations and hours of operation
2. Progress towards goals – created at end of each school year
3. Other accomplishments – created at end of each school year

GOALS

## Goals for years 2009-2011

GOAL	Responsible Person(s)	Completion Date	Resource Needs
Coordinate emergency preparedness training for all district employees who are required to take NIMS certified classes: ICS - 100, 200, 300, 400, 700 and 800 courses	Don Maus	February, 2010	Training materials and supplies, rooms depending on size of classes, outside trainers for some courses
Provide a variety of emergency preparedness training opportunities, including table-top exercises, drills and joint exercises with outside/local agencies	Don Maus	June, 2011	Training materials and supplies, rooms depending on size of classes, outside trainers for some courses
Review parking citation issuance and collection program	Al Chin, Devon Trahan and James Wooley	June, 2010	Funding for new parking citation issuing devices, software programs for data and fee collection
Increase use of security hardware systems to protect our people and facilities district-wide	Al Chin, Devon Trahan, and/or James Wooley, working with site administrators at each site	June, 2011	Funding for equipment and installation, possible need for space on IT server network and in offices for hardware
Coordinate an "active shooter on campus" tabletop exercise at each campus	Don Maus	December 2010	Training materials and supplies, rooms depending on size of classes, assistance from local law enforcement personnel
Review patrol vehicle pool, to ensure safe and fuel efficient vehicles are selected to replace worn-out vehicles	Al Chin	June, 2010 and June, 2011	Funding for replacement vehicles
Coordinate a district-wide First Aid/CPR class for employees	Don Maus	February, 2010, and February, 2011	Training materials and supplies, rooms depending on size of classes
Improve Emergency Operations Center capabilities at each campus	Don Maus	December, 2010	Laptop/notebook computers and multi-port phone switches, large screen monitors

**GOALS**



## Progress Toward Goals: June 2010

2009-2011 Goals	Progress Rating 1 – 10 (10 = completed)	Comments
Coordinate emergency preparedness training for all district employees who are required to take NIMS certified classes: ICS - 100, 200, 300, 400, 700 and 800 courses	8	We held several ICS classes in January of 2010 and had over 50 attendees. About 90% of those who are required to take the ICS classes have completed the necessary courses.
Provide a variety of emergency preparedness training opportunities, including table-top exercises, drills and joint exercises with outside/local agencies	8	We held a POD exercise at Santa Ana College which involved several outside agencies including the Fire Department, the Police Department and the OC Healthcare Agency. We have scheduled a POD exercise at Santiago Canyon College this fall, 10/29/10 and are in the planning stages. We also held an active shooter tabletop exercise at SAC and at SCC that included the SWAT teams from each respective city.
Review parking citation issuance and collection program	5	Have increased parking enforcement at SAC and SCC. Have met with Auxiliary Services Manager and two Lieutenants to discuss parking citations and collections, in response to BOT decision to increase parking fees for students and staff. Met with outside vendor to review automated citation/collection program.
Increase use of security hardware systems to protect our people and facilities district-wide	6	All new construction projects include intrusion alarms and access controls systems and video surveillance systems. We installed an intrusion alarm and video-surveillance system at the SAC/CDC. We have upgraded the intrusion alarm system at CEC. We have begun the implementation of a district-wide video-surveillance system, using the district office as a pilot location, with planned implementation in stages to the campuses.

**GOALS**

Coordinate an "active shooter on campus" tabletop exercise at each campus	10	Active shooter tabletop exercises were held at SAC and SCC, involving management ICS teams and the local police SWAT teams. Active shooter survival training was provided to staff and faculty at all sites.
Review patrol vehicle pool, to ensure safe and fuel efficient vehicles are selected to replace worn-out vehicles	3.3	The oldest patrol vehicle, a Dodge Avenger at SCC, was replaced with a fuel efficient hybrid SUV. We plan to replace two more worn vehicles with hybrids this year.
Coordinate a district-wide First Aid/CPR class for employees	10	First aid class held in January at the district office, and open to all employees at all sites. Thirty employees completed the class and are first aid certified. CPR classes were held at both SAC and SCC, and open to all employees.
Improve Emergency Operations Center capabilities at each campus	7	Purchased router boxes for each campus that operates up to 8 computers and phones in one data jack. This tool will enable the campus to set up a EOC in almost any room, with communications functions instantly. A laptop computer designated for emergency operations was purchased for the district office EOC.

GOALS

## Department Technology Plan

Include software, hardware, and training needs.

- Increase the safety and security of persons and district property by increasing the security hardware systems throughout the district: intrusion alarms, video surveillance systems, access control systems
- Develop procedures for these systems and train those who will be operating them
- Review cost effectiveness of implementing a “paperless records management system” that would integrate daily activity logs, crime reports, incident reports, patrol activities, and that would allow DSO’s on patrol to use a portable computer to generate these documents as well as access Datatel system
- Acquire laptop/notebook for Emergency Preparedness program
- Acquire multi-port phone switches for each site’s command post and the district’s EOC
- Acquire monitors for district EOC and command posts at SAC and SCC to allow ICS teams to monitor broadcasts relating to emergencies and to allow the group to remotely view images and documents pertaining to the emergency
- Identify needs and acquire additional walkie talkie radios
- Acquire additional Orange County Operational Area base radios for SAC and for SCC
- Explore Datatel’s mass communications during emergencies functionality
- Review existing mass communications systems, ie BERBEE, fire alarm P.A. systems, AlertU will meet the needs for mass communications: ensure regular training of authorized users

TECH  
PLAN

# Budget and Expenditures

Object Code	2008-2009		2009-2010		2010-2011	
	Budgeted	Expended	Budgeted	Expended	Budgeted	Expended
1000 – Academic Salaries	0	0	0	0	0	0
2000 – Classified Salaries	998,442	946,294	974,070	974,070	974,070	974,070
3000 – Employee Benefits	413,324	361,433	425,213	425,213	425,213	425,213
4000 – Books and Supplies	23,359	12,661	17,859	17,859	17,859	17,859
5000 – Services & Other Operating Exp	190,869	111,563	190,119	190,119	190,119	190,119
6000 – Sites, Buildings, Books & Equip.	34,946	3,666	40,446	40,446	40,446	40,446
7000 – Other Outgo	0	0	0	0	0	0
<b>TOTAL</b>	1,660,940	1,435,617	1,647,707	1,647,707	1,647,707	1,647,707

General Fund Unrestricted

Note: For Fiscal Year 2009-2010 and 2010-2011, budgets were split into three sites. SAC budget is \$635,770, SCC budget is \$419,174 and District budget is \$592,763.

**SELF-  
STUDY**

# Budget and Expenditures

Object Code	2008-2009		2009-2010		2010-2011	
	Budgeted	Expended	Budgeted	Expended	Budgeted	Expended
1000 – Academic Salaries	0	0	0	0	0	0
2000 – Classified Salaries	529,068	577,233	525,974	525,974	525,974	525,974
3000 – Employee Benefits	160,226	153,466	159,504	159,504	159,504	159,504
4000 – Books and Supplies	8,700	2,886	18,700	18,700	18,700	18,700
5000 – Services & Other Operating Exp	0	0	0	0	0	0
6000 – Sites, Buildings, Books & Equip.	0	0	0	0	0	0
7000 – Other Outgo	0	0	0	0	0	0
<b>TOTAL</b>	697,994	733,585	704,178	704,178	704,178	704,178

General Fund Restricted

**SELF-  
STUDY**

# Self-Study

## Self-study standard questions:

1. How do persons served by the program evaluate its adequacy, efficiency, and effectiveness?  
*We will conduct periodic surveys of staff and students to measure our effectiveness, adequacy and efficiency*
2. Are the services comparable in quality and scope to those offered by similar programs at other colleges?  
*We will confer with our peers in neighboring community colleges to compare our programs*
3. What efforts does the program make to continually upgrade its services?  
*External forces often drive this desire to upgrade the safety and security program. Major emergencies occur regularly at schools, colleges and universities, and when they do, we use them as teachable moments to review our programs.*  
  
*We also participate in professional organizations to try to stay abreast of "state of the art" equipment and best practices.*
4. How much progress has been made towards program goals?  
*There has been progress made in the following: emergency preparedness training and exercises, acquisition of additional walkie-talkie radios, implementation and training on fire alarm PA systems, AlertU, and BERBEE mass communications systems*
5. What are the strengths and weaknesses of the program?  
Strengths:  
*We have a number of flexible, friendly and service oriented individual officers and staff who truly embrace their roles and are responsive to the needs and become key members of the district and campus teams.*  
Weaknesses  
*Our level of staff only meets the minimum needs of most sites. We have difficulty recruiting long term part-time people who can fill our part-time vacancies.*  
*Our operations lack the technological enhancements that can improve efficiencies. We are still paper driven, and have a number of staff that are resistant to change.*  
*Our web-sites are not easy to find or easy to navigate, so people who may need information can't get it.*

SELF-  
STUDY

6. How successful has the department been in obtaining grants?

*We have applied for several grants, but due to fierce competition and small amounts of funding directed to our program in higher education institutions, we have been unsuccessful, but will continue to apply.*

*We have been able to take advantage of opportunities for training that benefits our programs when local municipal, county and state organizations who have won grants offer training programs that they develop from the grants.*

*We have also benefitted by acquiring some equipment from these sources.*

7. What are future trends expected to impact resource development?

*There will be a need for the district and the colleges to address mass communications needs for emergencies.*

*There will be a need to continue to provide emergency preparedness training to our employees, and to conduct more exercises jointly with other local public agencies.*

*As SCC continues to grow, there will be a need for a safety and security facility that is visible and accessible to students, staff and visitors. There will be a need for dispatch staff at SCC to handle the volume of radio and phone calls and to provide communications support for the officers in the field. There will be a need for a 24 hour patrol presence to protect that campus as it expands and acquires high technology systems.*

SELF-  
STUDY

## Recommendations

We have to be aware that there is a serious budget crisis that is expected to exist for at least the period that this planning effort encompasses. Exercises like this can create false expectations, and so we must revisit this annually, to acknowledge which goals are realistic and which functions we should consider continuing or dropping given the changing economic circumstances.

RECOM  
MEND.



# Rancho Santiago Community College District

## District Operations Planning Portfolio

2009-2011

District Construction and Support Services

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Department

*Update (June 2010)*



ORG. CHART

FUNCTIONS

GOALS

TECH  
PLAN

BUDGETS

SELF-  
STUDY

RECOM  
MEND.



## Portfolios for Planning

The purpose of the RSCCD portfolios is to provide an instrument for department planning, evaluation, and resource prioritization that is streamlined and that coordinates those related activities.

In good practice, planning processes are cyclic, and priorities for resource allocation result from the identification of goals. That is, evaluation, or program review, conclusions are used to identify future goals; those goals are used for budgeting. After plan implementation, further evaluation results in refined, revised plans, and so forth.

The portfolio process is designed to enhance the cohesion of planning-related activities as well as to allow for maximum customization of planning and evaluation activities for each unique support services department.

The portfolios should be maintained on an ongoing basis, with goals and budgets being updated each year. In this way, the portfolio can be used as a source document for resource allocation requests when needed.

ORG. CHART

FUNCTIONS

GOALS

TECH  
PLAN

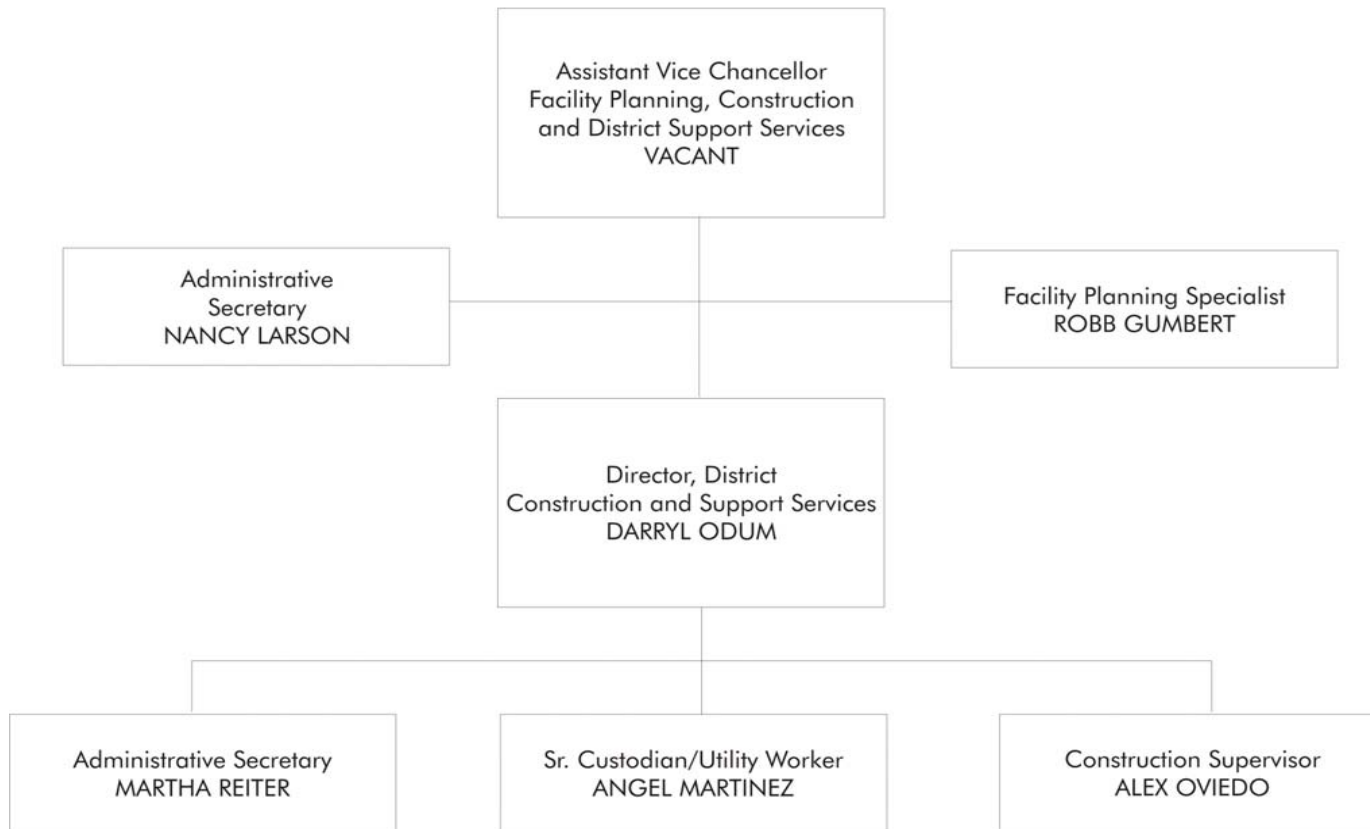
BUDGETS

SELF-  
STUDY

RECOM  
MEND.

# Organization Chart

Rancho Santiago Community College District  
**BUSINESS OPERATIONS/FISCAL SERVICES**  
**FACILITY PLANNING, CONSTRUCTION AND DISTRICT SUPPORT SERVICES**



ORG. CHART

# Functions

## Functions and services provided by the department:

Manage district office facility

Manage all construction activity for the district

Plan, develop and implement scheduled maintenance program

Plan, develop and implement hazardous materials abatement projects

Plan, develop and implement energy management system

Maintain all facility related documents related to construction. Includes all blueprints and CADD drawings

Plan, maintain budget and negotiate rates for all utilities for entire district

Maintain permits issued by governing agencies

FUNCTIONS

# Functions

## Customers and recipients of services:

District Office RSCCD employees

District Office tenants

Visitors to District Office

Staff and students at Santa Ana and Santiago Canyon Colleges

General population that uses district facilities for non-college related activities

FUNCTIONS

## Goals

1. Annual goals (including staff development goals) – created at beginning of each school year
2. Progress towards goals – created at end of each school year
3. Other accomplishments – created at end of each school year

GOALS

## Goals for years 2009-2011

GOAL	Responsible Person(s)	Completion Date	Resource Needs
1. Complete construction of the Maintenance & Operations Building at Santa Ana College.	Director of District Construction and Support Services	08/01/09	
2. Continue with the construction of the Child Development Center at Santa Ana College.	Director of District Construction and Support Services	09/01/10	
3. Continue with the construction of the Gym Restroom Addition at Santa Ana College.	Director of District Construction and Support Services	04/01/10	
4. Completion of the Fire Alarm Replacement at Santa Ana College.	Director of District Construction and Support Services	04/01/10	
5. Completion of the 12-inch Fire Water Line at Santa Ana College.	Director of District Construction and Support Services	12/01/09	
6. Complete construction of the Maintenance & Operations Building at Santiago Canyon College.	Director of District Construction and Support Services	12/01/09	
7. Complete construction of the Science Building at Santiago Canyon College.	Director of District Construction and Support Services	12/01/09	

GOALS

8. Relocate existing portables in the path of the planned Aquatics Center.	Director of District Construction and Support Services	01/30/10	
9. Develop an RFP for Construction Management Services for future construction projects at Santiago Canyon College.	Director of District Construction and Support Services	10/31/09	
10. Provide support to colleges to meet their needs for newly constructed or remodeled facilities.	Director of District Construction and Support Services	06/30/10	
11. Work with college staffs to define roles and responsibilities as they relate to facilities.	Director of District Construction and Support Services	06/30/10	
12. Work with ITS to provide infrastructure to support the installation of the technology plans. Includes installation of fiber optic and power distribution to support the hardware.	Director of District Construction and Support Services	06/30/10	

GOALS



## Progress Toward Goals (June 2010)

2009-2011 Goals	Progress Rating 1 – 10 (10 = completed)	Comments
1. Complete construction of the Maintenance & Operations Building at Santa Ana College.	10	The project is complete and Santa Ana College Maintenance staff is utilizing it to its fullest.
2. Continue with the construction of the Child Development Center at Santa Ana College.	9	The Child Development Center with its (5) separate buildings and individual play equipment areas are nearing completion in about 45 days.
3. Continue with the construction of the Gym Restroom Addition at Santa Ana College.	10	The Gym restroom addition and gym floor replacement is complete and the gym floor is being used by the students in the various Athletic programs. The gym building also received a newly installed fire sprinkler system.
4. Completion of the Fire Alarm Replacement at Santa Ana College.	10	The Fire Alarm Replacement is the second phase of a lengthy two and half year project that traversed across the campus and involved each structure. The Fire Alarm Replacement project is 100% complete.
5. Completion of the 12-inch Fire Water Line at Santa Ana	10	The 12-inch Fire/Water line ran from Bristol west thru Campus Drive

**GOALS**

College.		and north across the soccer field and tied into the new 10" Fire Water Line from College Ave. This was a very challenging project. The Project 100% complete.
6. Complete construction of the Maintenance & Operations Building at Santiago Canyon College.	9	The Maintenance & Operations Building is 90% complete. The contractor for this project has been very difficult to work with in getting the project to this stage. We are continuing to finish the project and close out all outstanding issues.
7. Complete construction of the Science Center at Santiago Canyon College.	10	The dedication ceremony for the Science Center was held on June 23 <sup>rd</sup> . Classes for the Science Center are scheduled to begin this fall and SCC staff is starting to move-in. The project is complete.
8. Relocate existing portables in the path of the planned Aquatics Center.	10	The Exercise Science portables have been relocated from out of the path of the new Athletics and Aquatics Center. The project is complete.
9. Develop an RFP for Construction Management Services for future construction projects at Santiago Canyon College.	10	All Proposals have been reviewed and evaluated. Seville Construction has been selected as the Construction Management firm for the current construction projects at Santiago Canyon College.
10. Provide support to colleges to meet their needs for newly constructed or remodeled facilities.	9	These meetings are on-going.
11. Work with college staffs to define roles and responsibilities as they relate to facilities.	9	These are continued discussions.
12. Work with ITS to provide infrastructure to support the installation of the technology plans. Includes installation of fiber optic and power distribution to support the hardware.	10	These plans are on-going as we continue to prepare for the future.

GOALS

## Department Technology Plan

Include software, hardware, and training needs.

- One of the identified goals is to work with ITS to provide infrastructure to support the installation of the technology plans which includes installation of fiber optic and power distribution to support the hardware and training needs.
- Convert hard copy record retention to electronic storage. Pricing is being obtained and funding.

TECH  
PLAN

# Budget and Expenditures

Object Code *	2009-2010		2010-2011 **		2011-2012	
	Budgeted	Expended	Budgeted	Expended	Budgeted	Expended
1000	0.00	0.00	0.00	0.00		
2000	279,133.00	266,904.00	266,904.00	66,726.00		
3000	99,706.00	97,446.91	103,238.00	21,531.77		
4000	1,810.00	564.68	1,810.00	109.78		
5000	2,400.00	1,584.04	1,200.00	169.68		
6000	0.00	0.00	0.00	0.00		
7000	0.00	0.00	0.00	0.00		
<b>TOTAL</b>	383,049.00	366,499.63	373,152.00	88,537.23		

\* 54132 Office

\*\* As of 11/02/09

BUDGETS

# Budget and Expenditures

Object Code *	2009-2010		2010-2011 **		2011-2012	
	Budgeted	Expended	Budgeted	Expended	Budgeted	Expended
1000	0.00	0.00	0.00	0.00		
2000	73,740.00	73,740.00	17,491.00	15,945.19		
3000	28,688.00	31,166.58	0.00	5,325.57		
4000	4,700.00	3,352.98	4,700.00	982.32		
5000	339,977.00	259,913.28	441,007.00	112,222.07		
6000	0.00	0.00	0.00	0.00		
7000	0.00	0.00	0.00	0.00		
<b>TOTAL</b>						

\* 54133 Maintenance

\*\* As of 11/02/09

BUDGETS

# Self-Study

## Self-study standard questions:

1. How do persons served by the program evaluate its adequacy, efficiency, and effectiveness?

There are periodic surveys done as part of the self study process and program review.

2. Are the services comparable in quality and scope to those offered by similar programs at other colleges and institutions?

Yes. I have joined an organization of local Directors to share ideas and compare service levels.

3. What efforts does the program make to continually upgrade its services?

Solicit feedback from people that use the service. I meet on a regular basis with other staff members to review status of projects and find solutions to problems.

4. How much progress has been made towards program goals?

Program goals are moving along as scheduled. One of the goals is dependant on fiscal support to purchase needed equipment.

SELF-  
STUDY

## Self-Study

### Self-study standard questions:

5. What are the strengths and weaknesses of the program?

Technical support is the strength of the program. Having a clear understanding of the roles of the two colleges and the district is the weakness of the program.

6. How successful has the department been in obtaining grants?

The department has not had much success so far, but will continue to solicit obtaining grants.

SELF-  
STUDY

## Recommendations

It is recommended that a single list of "Approved Projects" be developed prior to the start of each fiscal year. The projects should be directly tied back to the short and long term plans developed by the two Colleges and District. The projects can be sorted by "Capital Projects," "Facility Modification Projects," "Scheduled Maintenance Projects," "Hazardous Materials Projects," "ADA Projects," "Grants Projects," and "Other Projects." The funding source and required completion date shall also be shown to allow for prioritization of projects. "Unplanned Projects" should also be listed to be able to measure their relative importance to the planned projects. The list should be updated and widely distributed at the start of each fiscal year and each time a project is added or deleted.

RECOM  
MEND.



# Rancho Santiago Community College District

## District Operations Planning Portfolio

2009-2011



### FISCAL SERVICES

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Department

*Update (June 2010)*

ORG. CHART

FUNCTIONS

GOALS

TECH  
PLAN

BUDGETS

SELF-  
STUDY

RECOM  
MEND.



## Portfolios for Planning

The purpose of the RSCCD portfolios is to provide an instrument for department planning, evaluation, and resource prioritization that is streamlined and that coordinates those related activities.

In good practice, planning processes are cyclic, and priorities for resource allocation result from the identification of goals. That is, evaluation, or program review, conclusions are used to identify future goals; those goals are used for budgeting. After plan implementation, further evaluation results in refined, revised plans, and so forth.

The portfolio process is designed to enhance the cohesion of planning-related activities as well as to allow for maximum customization of planning and evaluation activities for each unique support services department.

The portfolios should be maintained on an ongoing basis, with goals and budgets being updated each year. In this way, the portfolio can be used as a source document for resource allocation requests when needed.

ORG. CHART

FUNCTIONS

GOALS

TECH  
PLAN

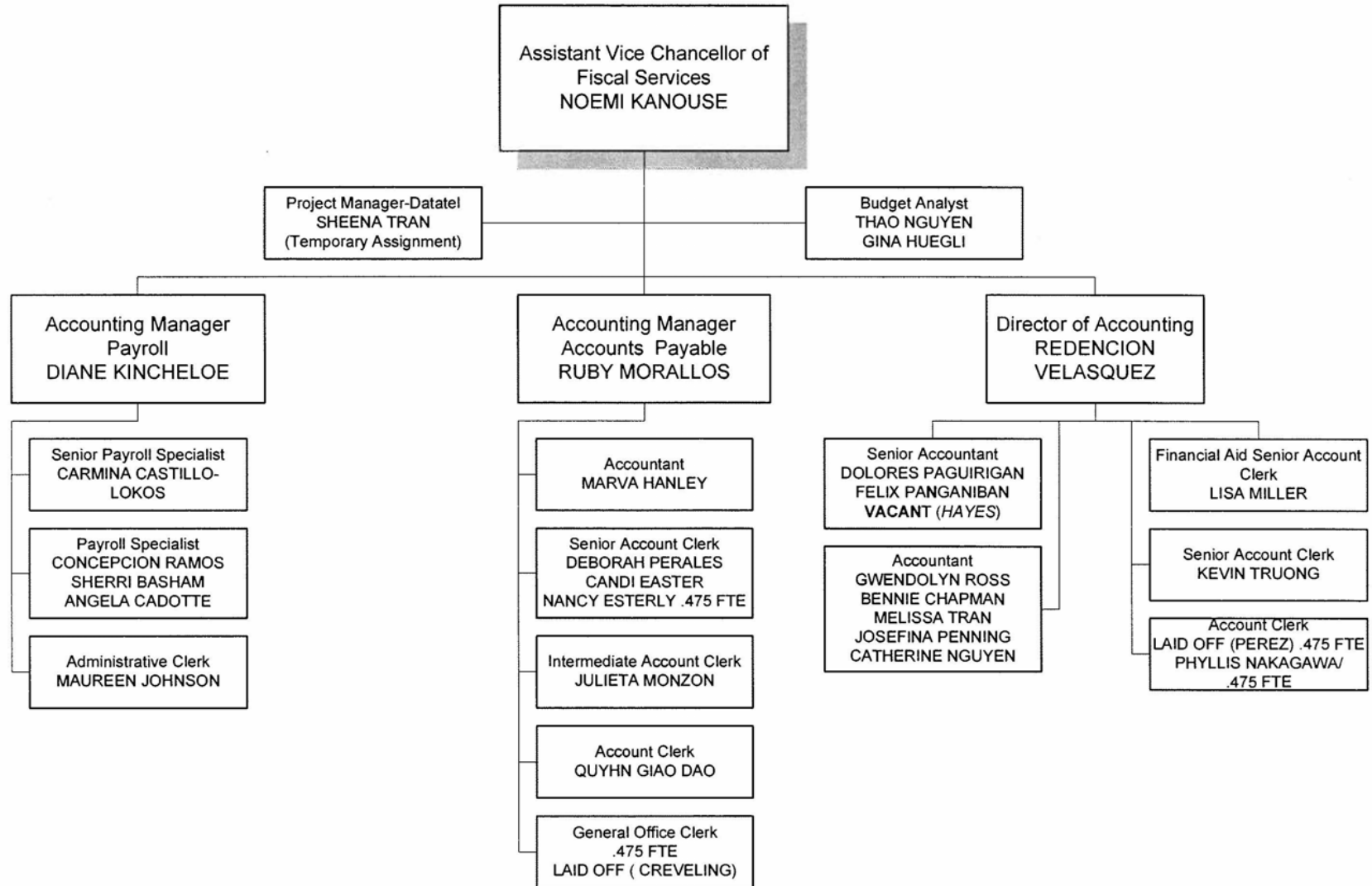
BUDGETS

SELF-  
STUDY

RECOM  
MEND.

# Organization Chart

June 2009



ORG. CHART

# Functions

## Functions and services provided by the department:

The Fiscal Services Department serves as the financial center for the District's operations. It includes budgeting, accounting, accounts payable, enrollment management, payroll, and project management areas. The Fiscal Services Department coordinates the annual budgetary process in conjunction with the colleges. It establishes the expenditure levels for the expected revenues, and manages the district's share of the General Fund as well as other special funds. Properly record actual revenues and expenditures, assures the timely payment of wages and salaries to staff and outside contractors and vendors. Provides reports for monitoring budget and expense performance, and complies with external reporting requirements.

- Act as a resource to campus and district personnel for any issues
- Prepare quarterly financial and investment reports for submission to the Board of Trustees
- Monitor cash balances to assure liquidity and diversify funds for better market yield when appropriate
- Prepare monthly cash flow statements for the General Fund
- Ensure all financial reports are completed accurately and filed timely
- Serve as the co-chair of the District Enrollment Reporting Committee. Provide financial information and forecasts as necessary
- Monitor arbitrage calculations for bond proceeds
- Provide for bi-annual actuarial studies on workers' compensation, property and liability, and retiree benefits obligations
- Prepare and submit annual continuing disclosure documents for bond issuances
- Prepare monthly bond expenditures and percentage of completion reports
- Prepare and coordinate information for the Bond Oversight Committee
- Ensure all district accounts and funds undergo an annual independent audit. Follow-up and resolve any related audit issues.
- Present the audit reports to the Board Fiscal & Audit Review Committee
- Monitor federal, state, and local law changes and revise our practices and procedures as necessary to comply with applicable provisions
- Prepare financial reports and forecasts as requested
- Maintain the Fiscal Services section of the District's website

### **Budget**

- Prepare and coordinate information for the Budget Allocation & Planning Review Committee
- Prepare the annual budget assumptions for review and discussion with the Budget Allocation & Planning Review Committee. Ensure that the recommended assumptions are taken to the Board of Trustees for approval
- Establish the budget for revenue and fixed cost expenditures. Provide campuses with discretionary allocations
- Serve as a liaison with the District Enrollment Management Committee in determining Full-Time Equivalent Students (FTES) targets
- Coordinate budget preparation and augmentations with the Resource Development department for categorical programs
- Coordinate budget preparation and funds availability with the Facilities department for the bonds and capital outlay budgets
- Revise the budget throughout the year as needed

**FUNCTIONS**

- Prepare the Tentative and Adopted Budget books and present them to the Board of Trustees
- Produce monthly revenue and expenditure year-to-date projection reports
- Produce monthly financial budget comparison reports
- Prepare forecasts and cost estimations for collective bargaining purposes
- Monitor and provide backfill for classified vacancies when requested
- Comply with external reporting requirements

**Accounting**

- Receives and allocates district revenues for local state and federal sources
- Receives and processes payments by students and employees
- Ensures balancing procedures for district activities with Orange County Office of Education
- Reconciles bank accounts
- Processes budgets, verifies and monitors expenditures to insure compliance with all regulations and prepares reports for more than 324 federal, state and local special projects
- Maintains Chart of Accounts, general and subsidiary ledgers and special journals
- Interacts with program directors and state agencies for timely reporting with auditors for compliance issues
- Prepares quarterly and annual financial reports to the State Chancellor's Office and Orange County Department of Education
- Performs internal audit function
- Serves as resource to all district employees regarding accounting issues
- Develop manuals and provide training to end-users on the accounting system
- Interact with program directors, federal, state and local program agencies and external auditors on compliance and audit issues
- Prepare internal reports for the Board of Trustees and other district users
- Prepare quarterly and annual financial reports for submission to the State System Office and Orange County Department of Education
- Prepare Comprehensive Annual Financial Report as required and in accordance with the Governmental Accounting Standards Board and generally accepted accounting principles
- Perform reconciliation procedures for district activities with Orange County Department of Education and all district bank accounts
- Prepare and submit the Miscellaneous Income Tax forms (1099)
- Provide capital asset summary and support schedules based on established capitalization and depreciation policies in conformity with generally accepted accounting principles. Assure the capital asset subsidiary ledger is in agreement with the general ledger control accounts
- Receive and record collections from students and employees
- Provide support, bookkeeping services and financial reporting to the District Foundation
- Keep updated and adapt to changes in accounting regulations
- Process financial aid transcripts
- Manage and collect Perkins Loan funds and grant over-awards; perform due diligence procedures
- Disburse student financial aid payments
- Maintain student financial aid subsidiary ledgers

**FUNCTIONS**

### **Accounts Payable**

- Ensure the accuracy, completeness and appropriateness of payments made to outside vendors for goods and services, to staff for expense reimbursements, and to students for grants, tuition refunds, stipends and other reimbursements
- Disseminate, explain and interpret district, state and federal regulations related to accounts payable functions. Implement new district policies and procedures resulting from new legislation
- Establish and maintain vendor records and archiving of files in accordance with county, local and state requirements and IRS regulations
- Maintain an effective relationship with vendors through timely and accurate payment and responses to inquiries
- Monitor the timing of payments in order to avail of discounts, maintain satisfactory credit ratings and avoid or minimize interest expense and penalties due to late payments
- Prepare and provide necessary schedules, documentation and files to internal/external auditors
- Maintain liaison with County School Claims
- Coordinate accounts payable activities with the Purchasing Department

### **Enrollment Management**

- Work closely with campus personnel to identify external influences impacting enrollment and elicit strategies for enrollment growth
- Prepare and obtain certification for the apportionment attendance reports (CCFS-320) and the apprenticeship attendance reports (CCFS-323)
- Develop analysis, historical performance trends, and projections compared to the annual targets
- Assure that the methods of collecting attendance and reporting comply with the education code, regulations, advisories and related publications
- Oversee the adequacy of record retention to support the audit trail
- Improve the system's data extraction reports and efficiency in reporting information.
- Oversee the system conversion for attendance gathering
- Present and discuss Full-Time Equivalent Students (FTES) projections and trends to the District Enrollment Management Committee
- Prepare documents and reports as required or requested by State agencies or District personnel working in collaboration with campus personnel
- Our target for 2008-09 was 32,034 FTES, the year concluded with FTES being over target by 2,276
- We will be reporting out of Datatel for fiscal 2009-10 and are in the works of programming all the necessary reports in order to report accurate attendance records
- Below is the history of Full-Time Equivalent Students for the last nine years

**FUNCTIONS**

## **Payroll**

- Serve as a resource to all district employees regarding payroll issues.
- Collect, prepare and process timely and accurate payroll, payroll taxes and retirement information for all district employees.
- Analyze Human Resources, Risk Management and other source documents to ensure proper payments, taxation and withholding to employees.
- Maintain records of employee voluntary deductions and remittances.
- Balance and process accruals and usage of all leave types (sick, vacation etc.) verifying compliance with Education Code requirements and Union Agreements.
- Assure payroll compliance with Federal and State regulations and district policies and procedures.
- Audit, reconcile and file annual, quarterly and monthly reports to Federal and State agencies including, W-2, W-2C, 1099, 941 and DE43 forms etc.
- Process and reconcile employee insurance benefit payments for full-time employees, domestic partners, retirees and COBRA.
- Participate in New Hire Orientation workshops.
- Partner and oversee Third Party Administrator for 403b and 457 plans.
- Assist departments with calculating budget cost of new positions.
- Keep updated and adapt to changes in accounting, tax and retirement law regulations.
- Prepare and update the Payroll Procedures Manual.
- Prepare and provide necessary schedules, documentation and files to internal/external auditors.

## **Project Management**

- Assess current processes, procedures and reporting needs including process mapping
- Establish and set-up system codes and parameters
- Develop screen and record level security classes for various roles and assign employees to appropriate roles
- Determine approvers and alternates for all departments and assign users to appropriate departments and approvers
- Work with Information Technology Services (ITS) to develop procedures to add new users into the system with appropriate security classes
- Determine reporting needs and develop reports to accommodate end-users and external reporting requirements
- Coordinate with other areas (human resources and student module teams) to get the most out of the integrated system
- Determine customization, third party software and other needs in addition to the standard Datatel system
- Coordinate schedules and communications between teams, ITS, consultant and end users
- Lead team meetings and provide administrative support
- Facilitate training and consulting sessions
- Document team implementation issues, alternatives, decisions and reasons for decisions
- Test system including various scenarios, module to module and live simulation testing. Identify and resolve problems that arise
- Provide ongoing support to users
- Train end-users in the new financial system, including purchase requisition, general ledger/budget, approvals and introduction and navigation training
- Develop training manuals and desk reference guides
- Coordinate completion and submission of the Lifetime Learning Credit and Hope Scholarship forms (1098-T)

**FUNCTIONS**

# Functions

## Customers and recipients of services:

- All District divisions and departments
- Public requesting information
- Federal, State and Local Agencies
- Private organizations and foundations
- Students

FUNCTIONS



# Goals

1. Annual goals (including staff development goals) – created at beginning of each school year
2. Progress towards goals – created at end of each school year
3. Other accomplishments – created at end of each school year

GOALS

## Goals for years 7/1/2009 to 6/30/2010

GOAL	Responsible Person(s)	Completion Date	Resource Needs
1. Provide analytical support for budget process in shared governance contract.	Fiscal Services	Ongoing	
2. Strengthen internal controls to safeguard assets.	Fiscal Services	Ongoing	Internal Auditor
3. Develop/revise procedures for fiscal services related to budgeting, accounting, payroll, accounts payable and Datatel project management.	Fiscal Services	Ongoing	
4. Enhance the use of technology throughout district and college departments.	All Staff	Ongoing	Upgrade computers
5. Enhance communication between district departments and colleges.	All Staff	Ongoing	
6. Continue department training on Datatel.	Fiscal Services	Ongoing	
7. Continue to implement Datatel integration by linking student cashiering and student accounts receivables.	Fiscal Services	Ongoing	A new part-time for Accounts Receivables
8. Coordinate the processing of 1098-T reporting between GLINK system and Colleague system for calendar year 2009.	Program Manager	1/31/2010	
9. Work with ITS in developing reports needed for Banked LHE, Enrollment, Other Student Fees and Attendance Reporting for CCFS-320.	Fiscal Services	In Progress	

GOALS

10. Begin revision of the Budget Allocation Model.	Fiscal Services	6/30/2010	
11. Collaborate with IT and consultants to prepare, test and document programs to process Datatel Payroll reports for input into OCDE Payroll system.	Payroll	9/30/2009	
12. Collaborate with Orange County Dept. of Education to implement their Employee Leave System (TNAS).	Payroll/Fiscal Services	8/31/2009 Completed	Continue allocate fund to pay OCDE \$15,000/yr.
13. Implement further use of Hours Worked Module in TNAS at OCDE.	Payroll	6/30/2010	
14. Implement further use of Site Timekeeper and Mgr. Approval Module in TNAS at OCDE.	Payroll	6/30/2011	
15. Train staff at sites in the use of TNAS for Leave maintenance at the site level.	Payroll	6/30/2011	
16. Audit and analyzes Medical, Dental, Vision, Life Insurance and TSA billings for employees, dependents, retirees and cobras.	Payroll	7/1/2011	Billing Reconciliation Specialist
17. Implementation of electronic reporting of Form 1099.	Accounts Payable	1/31/2011	Provide software to interact with Datatel
18. Provide timely payment to students for financial aid, stipends and refunds.	Accounts Payable	Ongoing	
19. Foster awareness in Admissions, Foundations and Student Business Office the importance of obtaining correct SS# or ITIN# for individuals to eliminate or minimize duplicate students in Datatel.	Accounts Payable	Ongoing	

GOALS

20. Promote compliance in the withholding, remittance and reporting of payments for services to non-California vendors under 592 & 592-B Nonresident Withholding Tax Statement.	Accounts Payable	Ongoing	
21. Continue to work closely with Facilities Planning to ascertain that retentions, escrows, stop notices, release of stop notices, bonded stop notices, etc. for construction payments are accurate and are properly applied.	Accounts Payable	Ongoing	
22. Monitor that 1099 payments are correctly identified and reported.	Accounts Payable	Ongoing	

GOALS

## Progress Toward Goals (June 2010)

2009-2011 Goals	Progress Rating 1 - 10 (10 = completed)	Comments
1. Provide analytical support for budget process in shared governance contract.	7	The budget crisis in California has increased the budget development analysis and awareness through the share governance process.
2. Strengthen internal controls to safeguard assets.	6	More can be done in this area - lack of resources
3. Develop/revise procedures for fiscal services related to budgeting, accounting, payroll, accounts payable and Datatel project management.	7	Payroll Reports (XCAW,XPCP & XPCR) have been in use since 7/1/09. Closing procedures have been established for Datatel project management.
4. Enhance the use of technology throughout district and college departments.	3	The replacement of six computers that were obsolete and unable to transmit the payroll information to OCDE. This was processed in accordance with the Strategic Technology Plan
5. Enhance communication between district departments and colleges.	8	Site Timekeeper Meetings with Payroll began in June 2010 and will meet quarterly thereafter.
6. Continue department training on Datatel.	10	Training is provided on an annual basis
7. Continue to implement Datatel integration by linking student cashiering and student accounts receivables.	6	Continue to work with Student Receivables to comprehend the Datatel process of how Fiscal & Student integrates

GOALS

8. Coordinate the processing of 1098-T reporting between GLINK system and Colleague system for calendar year	10	Mission was accomplished by January 31, 2010
9. Work with ITS in developing reports needed for Banked LHE, Enrollment, Other Student Fees and Attendance Reporting for CCFS-320.	8	Currently working with ITS on the enrollment and student fee reports The banked LHE reports were completed.
10. Begin revision of the Budget Allocation Model.	6	The Budget Allocation and Review Committee-Workgroup has been revising the Budget allocation Model thorough 2009-10
11. Collaborate with IT and consultants to prepare, test and document programs to process Datatel Payroll reports for input into OCDE Payroll system.	10	Payroll Reports are processed monthly for input into OCDE Payroll system for payment.
12. Collaborate with Orange County Dept. of Education to implement their Employee Leave System (TNAS).	10	All Leave information has been loaded into the new TNAS system. All employees now have accurate Leave activity and balances for all Leave types 24/7 on the EIS website.
13. Implement further use of Hours Worked Module in TNAS at OCDE.	3	Still testing with OCDE
14. Implement further use of Site Timekeeper Module in TNAS at OCDE.	1	Timekeeper meetings have begun with the Electronic Absence form trainings in June 2010. We will meet quarterly to communicate policies and procedures for Leave usage and tracking. Leave information access for Timekeepers and Managers will be our next task
15. Train staff at sites in the use of TNAS for Leave maintenance at the site level.	1	Quarterly Timekeeper meetings are now being scheduled.
16. Audit and analyzes Medical, Dental, Vision, Life Insurance and TSA billings for employees, dependents, retirees and cobras.	0	This manual process continues until we are able to fill the Billing Specialist position.

GOALS

17. Implementation of electronic reporting of Form 1099.	5	Datatel has electronic filing capability for 1099. File created was reviewed and prepared for proper IRS formatting requirement. There is no need for 3rd party software. This will be completed for 2011.
18. Provide timely payment to students for financial aid, stipends and refunds.	8	Worked closely with Financial Aid, Cashiering, OCDE and Accounting in changing disbursement dates to facilitate timely student payments.
19. Foster awareness in Admissions, Foundations and Student Business Office the importance of obtaining correct SS# or ITIN# for individuals to eliminate or minimize duplicate students in Datatel.	7	Through A/P's advocacy, monthly meetings are now held between departments to discuss ways to eliminate duplicate persons in Datatel by merging student, employee and vendor records for the same individual.
20. Promote compliance in the withholding, remittance and reporting of payments for services to non-California vendors under 592 & 592-B Nonresident Withholding Tax Statement.	9	Diligently monitor payments for services to ensure proper reporting.
21. Continue to work closely with Facilities Planning to ascertain that retentions, escrows, stop notices, release of stop notices, bonded stop notices, etc. for construction payments are accurate and are properly applied.	8	A/P and Facilities Planning met with contractors and construction management team to address policies, processes and procedures necessary to implement proper handling of change orders, stop notices, etc. in public construction work. This helped in the timely and accurate payments of progress billings.
22. Monitor that 1099 payments are correctly identified and reported.	8	1099 reports are run mid-year and reviewed for accuracy and completeness.

GOALS

## Accomplishments

- With the help of the Information Technology Department, a budget module was developed to help with the budget preparation. It allows for different budget cycles
- California is experiencing a recession and with that the need for over \$10 million in expense reductions was done in 2008-09
- The financial module of Datatel was implemented back in July 1, 2007. This was the only module in production during 2007-2008 and 2008-2009 fiscal years. Numerous reports have been developed to accommodate the expense distribution of the payroll and benefits data, county reconciling, special projects and reports for the colleges and other users of the system.
- For 2008-2009, there were 20,825 invoices processed and 14,604 checks written for the total amount of \$87,103,011 (excludes financial aid checks which are written by ITS), the total amount decreased by 2% from fiscal year 2007-2008
- This year marked an increase of stipends paid to students from the New Student Mentor Program, Transfer Mentor Program, STEM Teaching Scholars, CAMP and USDA PTSP
- This was also the first year that the district participated in the CCID Program which involved providing for housing, furniture, insurance, utilities, clothing and meal allowance, mentoring and other incidentals for 20 foreign students from Brazil, Indonesia, Pakistan, South Africa, Turkey and Egypt
- Annually, we prepare, remit, reconcile, and file reports to federal and state agencies including 1099, 1042, 1042-S and DE542. For 2008-2009 we prepared 225 1099's and collected and remitted quarterly withholding taxes for the 20 CCID foreign students
- Started to define criteria/schema and working with ITS to develop reports that mirrors the CCFS-320, CDCP Non-credit FTES, Comprehensive Center FTES, AB 540 Student Headcount, and Special Full-Time and Part-Time P.E. Credit FTES reports. There's still a lot of work to be done but we are making progress.
- Employee ID numbers issued to comply with new identity protection laws 7/1/08 (Social Security Numbers are no longer required on any Payroll Forms)
- Employee information system (EIS) through OCDE was made available to employees on direct deposit in order to view and print their own paystubs December 2008. Reducing printing, postage and handling costs
- Employee leave system (TNAS) implemented August 2009. GLINK system is no longer needed
- Training has been provided to all payroll staff and various site personnel in the use of the new TNAS web based program
- TNAS was made available to all employees to view and print their leave balances and activity August 2009
- Expanding role in new hire orientation presentations to include EIS and TNAS procedures

GOALS



- Payroll will be expanding responsibilities with the reconciliation, remittance and balancing of all insurance billings, insurance voluntary deductions and employee and retiree insurance premiums payments
- TNAS training of site timekeepers for input of leave and paid time. (Beta testing began August 2009)
- Datatel is the maker of Colleague, which incorporates three key areas: Student, Finance and Human Resources. The project assessment got under way in October 2005 and the Colleague Finance Application went live in July 2007.
- By replacing the antiquated GLINK technology, Datatel has integrated many fiscal processes making them more streamlined and less paper-based. These benefits will continue to expand over time as we migrate to having other applications go live
- The Payroll and Human Resources (HR) assignment contracts project began taking place in February 2009. The District hired Rose & Tuck as consultants to help us link the scheduling tasks with payroll. The District decided to stay with the Orange County Department of Education (OCDE) for payroll processing. We will not be using Datatel to pay our employees. It appears that Rose & Tuck will be utilizing the assignment contracts in Colleague to bring Payroll, HR and Student Scheduling together in a nutshell. More details to come as we progress into the testing stages during the fiscal year of 2009/10
- By January of 2009, more than 350 users were trained in the general ledger and purchasing components of the Colleague system. Subsequent bimonthly training sessions for new users were offered and follow-up training has been provided as needed
- Completion of Fixed Assets Inventory for compliance with GASB 35 in Datatel in June 2008
- Completion of Distribution of Budget for health benefits to sites in June 2008
- Purchase of extra printer in the Department to accommodate printing of Financial Aid checks in April 2009

GOALS

## Department Technology Plan

Include software, hardware, and training needs.

- Due to budget constraints, the department has not been able to replace outdated equipment. We need more efficient computers, with expanded memory and upgraded processing capabilities to be able to accommodate the processing demands of the Datatel system. The department budget for equipment has changed significantly as follows:

*Budget for 2006/07	\$61,752
*Budget for 2007/08	\$18,798
*Budget for 2008/09	\$ 0
*Budget for 2009/10	\$ 0

# Budget and Expenditures

Object Code	2008-2009		2009-2010		2010-2011	
	Budgeted	Expended	Budgeted	Expended	Budgeted	Expended
1000 – Academic Salaries	0	0	0	0	0	0
2000 – Classified Salaries	2,142,445	2,081,179	1,816,927	1,816,927	1,816,927	1,816,927
3000 – Employee Benefits	833,961	791,295	756,808	756,808	756,808	756,808
4000 – Books and Supplies	13,979	6,738	14,100	14,100	14,100	14,100
5000 – Services & Other Operating Exp	41,396	23,245	33,200	33,200	33,200	33,200
6000 – Sites, Buildings, Books & Equip.	0	332	0	0	0	0
7000 – Other Outgo	0	0	0	0	0	0
<b>TOTAL</b>	<b>3,031,781</b>	<b>2,902,789</b>	<b>2,621,035</b>	<b>2,621,035</b>	<b>2,621,035</b>	<b>2,621,035</b>

BUDGETS

# Self-Study

## Self-study standard questions:

1. How do persons served by the program evaluate its adequacy, efficiency, and effectiveness?
  - The Fiscal Services Department has faced budget constraints and reduction in force during the last year but still displays a positive attitude and is always willing to help. Positive feedbacks are always received from other departments.
  
2. Are the services comparable in quality and scope to those offered by similar programs at other colleges?
  - Staff development workshops have been held to help all staff better understand the new budget printouts and expenditures in the Datatel system.
  
3. What efforts does the program make to continually upgrade its services?
  - Fiscal Services delivers accurate and timely information as required by laws, contracts, vendors, departments and employees at all times.
  
4. How much progress has been made towards program goals?
  - We conduct regular meetings with staff and supervisors to discuss issues and future plans for the Fiscal Services Department.

SELF-  
STUDY

# Self-Study

## Self-study standard questions:

5. What are the strengths and weaknesses of the program?

We were not able to conduct any self study because the limited staff has to focus on performing the tasks required of the department.

### Strengths

The Group's collaboration of efforts has allowed us to continue providing excellent services.

### Weaknesses

The freeze of hiring and the reduction in force has weakened the department.

6. How successful has the department been in obtaining grants?

Not applicable.

7. What are future trends expected to impact resource development?

Not applicable

SELF-  
STUDY

# Recommendations

RECOM  
MEND.

# Rancho Santiago Community College District

## District Operations Planning Portfolio

2009-2011

### Information Technology Services

Department

*Update (June 2010)*



ORG. CHART

FUNCTIONS

GOALS

TECH  
PLAN

BUDGETS

SELF-  
STUDY

RECOM  
MEND.



## Portfolios for Planning

The purpose of the RSCCD portfolios is to provide an instrument for department planning, evaluation, and resource prioritization that is streamlined and that coordinates those related activities.

In good practice, planning processes are cyclic, and priorities for resource allocation result from the identification of goals. That is, evaluation, or program review, conclusions are used to identify future goals; those goals are used for budgeting. After plan implementation, further evaluation results in refined, revised plans, and so forth.

The portfolio process is designed to enhance the cohesion of planning-related activities as well as to allow for maximum customization of planning and evaluation activities for each unique support services department.

The portfolios should be maintained on an ongoing basis, with goals and budgets being updated each year. In this way, the portfolio can be used as a source document for resource allocation requests when needed

ORG. CHART

FUNCTIONS

GOALS

TECH  
PLAN

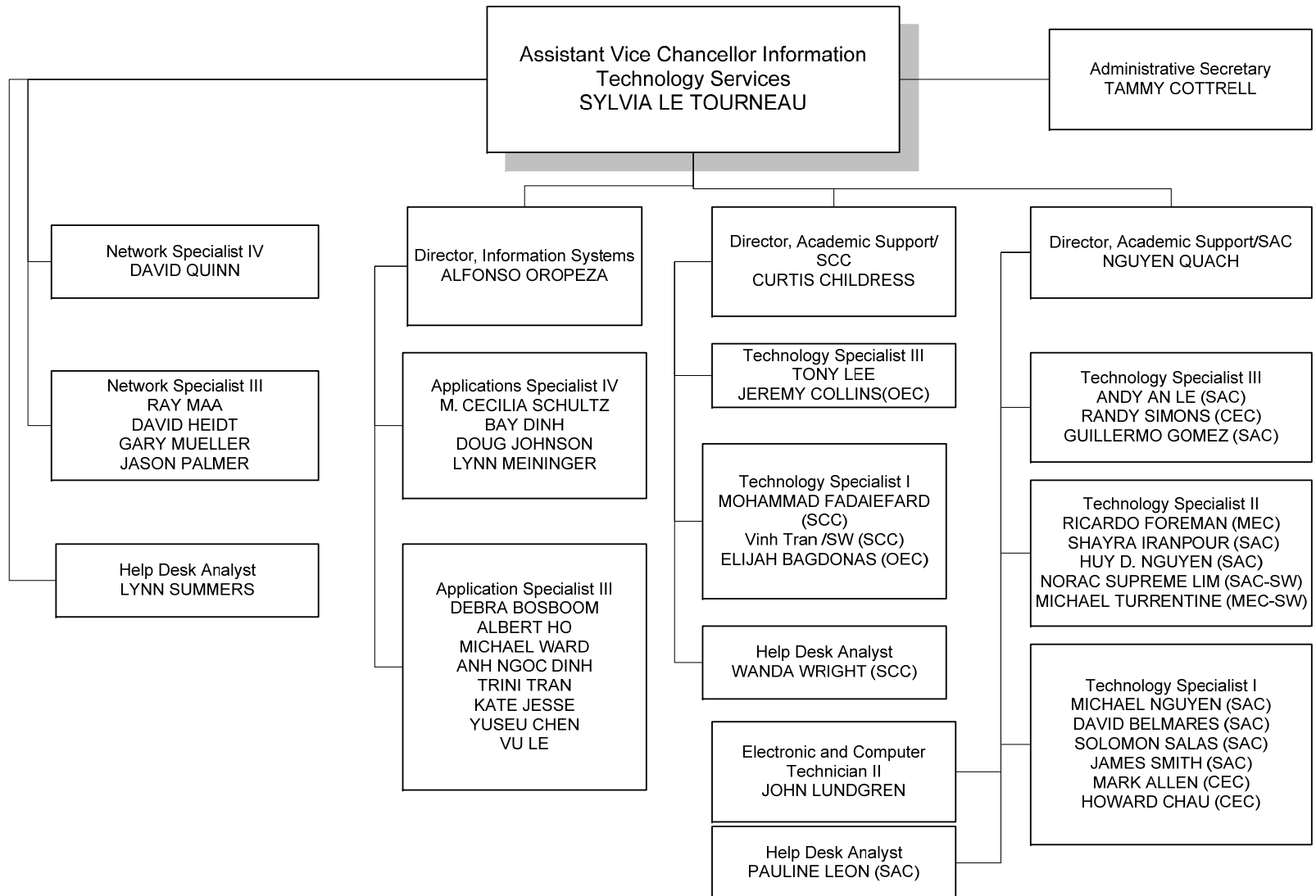
BUDGETS

SELF-  
STUDY

RECOM  
MEND.



**Rancho Santiago Community College District  
BUSINESS OPERATIONS AND FISCAL SERVICES  
INFORMATION TECHNOLOGY SERVICES**



**ORG. CHART**

# Functions

## Functions and services provided by the department:

1. Provides a robust, reliable, and secure information technology infrastructure to the district
2. Supports the use of information technology to enable academic innovation in teaching and learning
3. Provides electronic access to information
4. Anticipates and satisfies the needs of the community in a timely manner
5. Promotes and develops partnerships to empower campus-wide use of technology
6. Develops a community that is adaptable to technological changes
7. Provide professional customer services and satisfaction to users of faculty and staff

FUNCTIONS

# Functions

## Customers and recipients of services:

The employees, students and other constituents of:

District Operations  
Santa Ana College  
Santiago Canyon College  
Centennial Education Center  
Orange Education Center  
Child Development Centers

**FUNCTIONS**

## Goals for years 2009-2011

GOAL	Responsible Person(s)	Completion Date
Understand and Streamline Datatel's MIS Procedures	Alfonso Oropeza	June 2011
Develop prioritization mechanism for incoming application development requests	Alfonso Oropeza	June 2011
Develop Assignment Contract Module	Alfonso Oropeza	June 2010
Implement Bookstore Voucher System	Alfonso Oropeza	June 2011
Evaluate, purchase, and implement a Document Imaging/Management System	Sylvia LeTourneau	December 2010
Evaluate and Purchase Enterprise Storage Device including Backup solution	Sylvia LeTourneau	June 2010
Purchase email and document archiving solution	Sylvia LeTourneau	June 2010
Purchase firewall, intrusion prevention system, and bandwidth management replacement solution	Sylvia LeTourneau	March 2010
Upgrade to Exchange 2010	Sylvia LeTourneau	June 2011
Replace Remote Authentication System	Sylvia LeTourneau	June 2011
Purchase and replace academic servers	Nicholas Quach/Curt Childress	June 2010
Prepare an implementation plan for Windows 7 and Office 2007	Nicholas Quach/Curt Childress	June 2010
Develop and implement a common Systems Management System, includes inventory system, software deployment, imaging, security, asset, systems, remote control and maintenance.	Nicholas Quach/Curt Childress	June 2011
Evaluate printer repair strategy	Nicholas Quach/Curt Childress	June 2011
Virtual Desktop Evaluation	Curt Childress	June 2011

**GOALS**

## Progress Toward Goals (June 2010)

2009-2011 Goals	Progress Rating 1 – 10 (10 = completed)	Comments
Understand and Streamline Datatel's MIS Procedures	8	80% of data quality controls have been written and the document has been processes. A standard MIS schedule has been developed to use during the MIS reporting period. This project should be complete by August 2010
Develop prioritization mechanism for incoming application development requests	2	Many projects are submitted to the Application Development team. Therefore, a mechanism to balance and prioritize according to institution needs to be developed.
Develop Assignment Contract Module	10	This is the integration between the student system and the OCDE payroll system. Significant progress has been made and will be completed the fall 2009 term.
Implement Bookstore Voucher System	2	A system has been selected and purchased. Implementation will begin September 2010.
Evaluate, purchase, and implement a Document Imaging/Management System	5	A document management solution has been identified and purchased for the Financial Aid office. This system will begin implementation July 2010 and should be complete by December 2010.
Evaluate and Purchase Enterprise Storage Device including Backup solution	10	A new system was implemented and purchased
Purchase email and document archiving solution	8	The selected vendor solution has been purchase and implemented. Final configuration is being tested and on target for completion by June 2010.

**GOALS**

## Progress Toward Goals (June 2010) - *Continued*

2009-2011 Goals	Progress Rating 1 – 10 (10 = completed)	Comments
Purchase firewall, intrusion prevention system, and bandwidth management replacement solution	10	Implementation was completed by March 2010
Upgrade to Exchange 2010	0	Implementation is targeted for June 2011
Replace Remote Authentication System	0	Implementation is targeted for December 2010
Purchase and replace Academic Servers	5	Progress will be implemented throughout the year.
Prepare an implementation plan for Windows 7 and Office 2007	1	Windows 7 will be released in October 2009.
Develop and implement a common Systems Management System, includes inventory system, software deployment, imaging, security, asset, systems, remote control and maintenance.	0	Implementation is targeted for June 2011
Evaluate printer repair strategy	0	Implementation is targeted for June 2011
Virtual Desktop—Evaluation	3	Several products have been evaluated. Final selection and methodology defined is targeted for June 2011

**GOALS**

## Department Technology Plan

In conjunction with the Technology Advisory Committee, ITS follows the district ITS plan. As the annual budget is prepared, regular replacement of centralized services (e.g. network, email, servers) are taken into consideration. Generally, all hardware is on a replacement cycle and is replaced every 4 to 6 years, depending on the service. Departmental technology are also replaced on a regular cycle depending on the need.

ITS also budgets for the regular hardware and software maintenance for the mission critical applications (e.g. Datatel, Blackboard, etc).

TECH  
PLAN

## Budget and Expenditures

Object Code	2008-2009		2009-2010		2010-2011	
	Budgeted	Expended	Budgeted	Expended	Budgeted	Projected
1000 – Academic Salaries	--	--	--	--	--	--
2000 – Classified Salaries	3,329,346.00	3,374,901.08	3,556,764.00	3,546,258.55	3,421,278.00	3,331,121.00
3000 – Employee Benefits	1,171,415.00	1,189,706.72	1,355,672.00	1,279,921.63	1,300,786.00	1,212,413.00
4000 – Books and Supplies	84,695.00	64765.33	102,634.00	49930.03	124,464.00	1,212,413.00
5000 – Services & Other Operating Exp*	3,839,982.00	3,566,211.06	4,178,115.00	3,645,011.71	3,803,473.00	3,760,000.00
6000 – Sites, Buildings, Books & Equip.	555,381.00	434,621.08	509,813.00	294,036.28	736,940.00	718,432.00
7000 – Other Outgo	--	--	--	--	--	--
<b>TOTAL</b>	8,980,819.00	8,630,205.27	9,702,998.00	8,815,158.20	9,386,941.00	9,141,966.00
*5665-Fixed Maintenance Costs	2,033,197.00	2,033,186.94	2,428,916.00	2,386,339.50	2,329,700.00	2,329,700.00

**BUDGETS**



# Self-Study

## Self-study standard questions:

1. How do persons served by the program evaluate its adequacy, efficiency, and effectiveness?

Technology is a tool to assist faculty with curriculum development, employees with their daily jobs, and students with their communication to faculty and employees.

2. Are the services comparable in quality and scope to those offered by similar programs at other colleges?

No.

3. What efforts does the program make to continually upgrade its services?

On an annual basis, ITS works with the TAG committee to review the replacement goals and any special projects for the year.

4. How much progress has been made towards program goals?

5. What are the strengths and weaknesses of the program?

### Strengths

ITS has several core competencies which strengthen the ITS department. ITS has a culture of being service attitude. ITS has developed a robust and reliable network. ITS' understanding of departments' information and workflows is quite thorough.

### Weaknesses

Managing the incoming requests and linking these requests back to the core requirements of the organization.

SELF-  
STUDY

## Recommendations

As technology changes at its presently rapid pace, ITS recommends the training and development resources. Employees and workgroups e.g. departments and divisions are not kept up-to-date on the latest technology. Better use of how to use Outlook or the new phone system could assist departments with operational needs.

Also, faculty need training and assistance integrating technology advances into their curriculum, yet they do not have a resource to assist them.

Similar to our students, Faculty and Staff learn new software different ways, therefore the institution needs to develop training materials that meet these needs.

ITS recommends a faculty resource department where support staff evaluate the latest sustainable trends (discounting short-lived technology-based fads and develop training and support materials to assist faculty in developing curriculum. This department should report to the academic side of the organization for each location.

ITS also recommends adding staff for training and resource development for job-related programs e.g. Windows, Outlook, Datatel, and the new phone system.

RECOM  
MEND.

# Rancho Santiago Community College District

## District Operations Planning Portfolio

2009-2011

Purchasing, Warehouse, Inventory & Mail Services

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Department

*Update (June 2010)*



ORG. CHART

FUNCTIONS

GOALS

TECH  
PLAN

BUDGETS

SELF-  
STUDY

RECOM  
MEND.



## Portfolio for Planning

The purpose of the RSCCD portfolio is to provide an instrument for department planning, evaluation, and resource prioritization that is streamlined and coordinated with the related activities.

In good practice, planning processes are cyclic, and priorities for resource allocation result from the identification of goals. That is, evaluation, or program review, conclusions are used to identify future goals; those goals are used for budgeting. After plan implementation, further evaluation results in refined, revised plans, and so forth.

The portfolio process is designed to enhance the cohesion of planning-related activities as well as to allow for maximum customization of planning and evaluation activities for each unique support services department.

The portfolio should be maintained on an ongoing basis, with goals and budgets being updated each year. In this way, the portfolio can be used as a source document for resource allocation requests when needed.

ORG. CHART

FUNCTIONS

GOALS

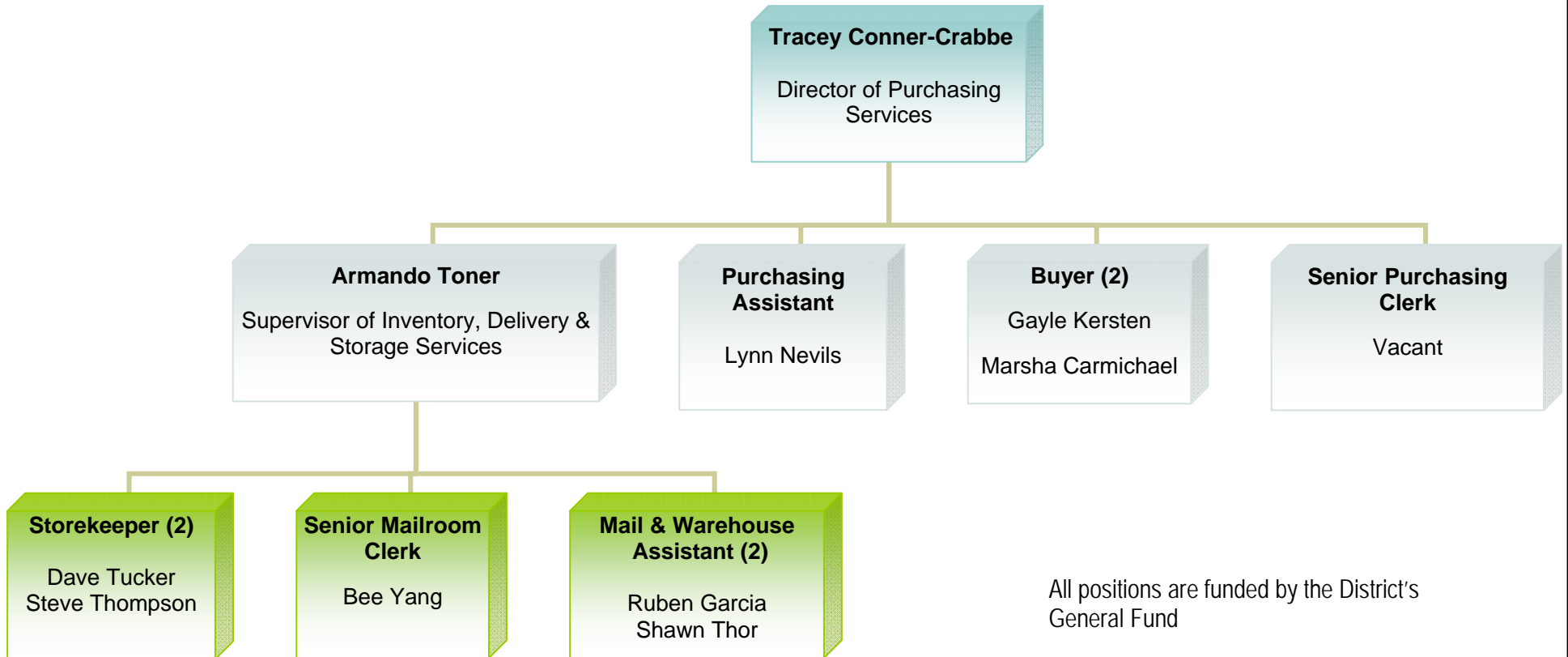
TECH  
PLAN

BUDGETS

SELF-  
STUDY

RECOM  
MEND.

# Organization Chart



ORG. CHART

# Functions

## Functions and Services Provided by the Department:

The Purchasing Department is centralized and has the procurement authority for the District, responsible for the acquisition of supplies, materials, equipment and services while ensuring that expenditures are proper, competitive, and without conflict of interest by following mandated rules and regulations in an ethical and responsible manner. Other major functions are record retention/storage, warehouse/receiving, fixed assets, surplus property and mail services.

## Purchasing:

- Procure supplies, materials, equipment and services within the required deadlines.
- Prepare, evaluate, analyze, and recommend awards of bids and request of proposals for supplies, equipment and services.
- Execute and manage competitive quotations and formal bids.
- Research and implement the usage of cooperative purchasing contracts, when feasible.
- Purchase without prejudice, seeking to obtain the maximum value for each dollar expended.
- Maintain contractor insurance and bonding certificates.
- Maintain data base for approximately 400 service contracts including leases and rental of property and facilities.
- Execute and manage maintenance contracts (copiers, elevators, HVAC, janitorial, parking lot sweeping, landscape etc.).
- Provide end-user training for the online requisitioning system.
- Support bond projects related to the furnishing of newly constructed and renovated buildings.
- Recruiting & interviewing new vendors.
- Maintain and enforce the required timelines for records retention.

FUNCTIONS

# Functions

## Warehouse & Inventory Control:

- Ensure shipments of received supplies and equipment are correct, undamaged and delivered to departments and sites.
- Make arrangements for return merchandise.
- Follow-up on non-delivery or late delivery of orders.
- Organize and delivery of surplus furniture and equipment to requestor.
- Maintain inventory records of all capital assets, upgrades of equipment, retirements and transfers of equipment.
- Capitalization of all capital needs.
- Posting of depreciation for all depreciable capital assets.
- Prepare inventory reports and reconcile inventory.
- Tag all inventoriable equipment.
- Coordinate public auction for surplus property.
- Coordinate the delivery and return of records to Schick Records Storage facility.

## Mail Services:

- Provide mail service to all sites.
- Prepare mail for delivery to post office.
- Sort incoming US mail and inter-office and distribute to departments and sites.
- Sort, log and deliver all accountable parcels and packages.
- Maintain faculty and departmental mailboxes.
- Scrutinize mailings and make recommendations on cost effective solutions.

## Customers and recipients of services:

- Federal, state, county and local government agencies, students, faculty, administrators, classified employees, vendors, consultants, independent contractors and the general public.

FUNCTIONS

## Goals for years 2009-2011

GOAL	Responsible Person(s)	Completion Date	Resource Needs
Develop purchasing handbook	Tracey Conner-Crabbe	June 2011	N/A
Develop online ordering procedure manual for office supplies	Tracey Conner-Crabbe	December 2009	N/A
Development and implementation of online procedural forms and manuals to the employee intranet	Tracey Conner-Crabbe Armando Toner	October 2009	N/A
Support "Go Green" efforts by purchasing environmentally and recycled products whenever practical	Tracey Conner-Crabbe Gayle Kersten Marsha Carmichael	On-going	N/A
Continue offering end-user training on the online requisitioning system	Tracey Conner-Crabbe Lynn Nevils Marsha Carmichael	On-going	N/A
Implement paper conservation program for the district office.	Tracey Conner-Crabbe	On-going	N/A
Timely disposition of surplus assets through outbound donations and auctions with a minimal amount of disruption to construction projects and space reconfigurations	Armando Toner	On-going	N/A

GOALS



## Goals for years 2009-2011

GOAL	Responsible Person(s)	Completion Date	Resource Needs
Complete district wide physical inventory and reconciliation of discrepancies	Armando Toner	August 2010	N/A
Improve communication to site administrators regarding the availability of surplus space in the District Warehouse to avoid the sites from stockpiling surplus and using their areas as dumping areas.	Armando Toner	June 2010	N/A
Creative scheduling of resources to provide adequate district wide services in the aftermath of continuing reductions in force	Tracey Conner-Crabbe Armando Toner	On-going	N/A

GOALS

## Progress Toward Goals (June 2010)

2009-2011 Goals	Progress Rating 1 – 10 (10 = completed)	Comments
Development and implementation of online procedural forms and manuals to the employee intranet	10	
Develop online ordering procedure manual for office supplies	10	
Complete district wide physical inventory and reconciliation of discrepancies	7	The standard Datatel CF inventory report is incapable of providing current location data for reconciliation of discrepancies. A suitable inventory report is being developed with ITS. We are in the final enhancement & testing phase.
Improve communication to site administrators regarding the availability of surplus space in the District Warehouse to avoid the sites from stockpiling surplus and using their areas as dumping areas.	10	Beginning with the completion of the June 2010 surplus disposition process, we will e-mail notification of the availability of surplus space and encourage them to send surplus to us at this optimum time.
Implement paper conservation program for the district office.	5	Proposal is complete; waiting for approval to implement.

GOALS

## Department Technology Plan

Include software, hardware, and training needs.

- Without funds for additional equipment, the department's technology plan is to keep our current technology operational until funds become available.

TECH  
PLAN

# Budget and Expenditures

Object Code	2009-20010		2010-2011		2011-2012	
	Budgeted	Expended	Budgeted	Expended	Budgeted	Expended
N/A						
<b>TOTAL</b>						

BUDGETS

# Self-Study

## Self-study standard questions:

1. How do persons served by the program evaluate its adequacy, efficiency and effectiveness?
  - Received positive feedback regarding the accessibility of procedural forms and manuals now that they are available on the employee intranet.
  - Since the district went live with its financial software system "Colleague", the online requisitioning system has reduced the time it takes to process a purchase order. This means that the turn around time is much quicker resulting in orders being received sooner. Also, we have reduced the paper consumption by eliminating the number of parts in the purchase order form.
  - Offering ongoing end-user training sessions for the online requisitioning system has definitely improved our service overall.
  - Warehouse has received positive comments regarding turnaround times for retrieving and delivering of district records. The high volume requestors such as Payroll, Human Resources, and Financial Aid have been very pleased with the quick response.
2. Are the services comparable in quality and scope to those offered by similar programs at other colleges?
  - Yes; however, the Purchasing Department has always been proactive in working with legal counsel in obtaining approval to utilize many cooperative contracts not only for RSCCD but all community colleges in Orange County.
3. What efforts does the program make to continually upgrade its services?
  - By soliciting feedback from the departments by distributing surveys after each end-user training sessions and implementing those suggestions that are determined to be beneficial.
  - Deploying many of our procedural documents and manuals in the employee intranet for easy access.

SELF-  
STUDY

## Self-Study

- To continue networking with various purchasing groups, schools and local agencies in sharing resources.
  - Preparing a purchasing handbook with detailed guidelines for District use.
4. How much progress has been made towards program goals?
- Procedures for online ordering of office supplies are near completion.
  - Purchasing handbook is in its beginning stage.
  - District wide physical inventory and reconciliation of discrepancies will be completed in May 2010.
  - Continue to provide online requisitioning end-user training.

### Self-study standard questions:

5. What are the strengths and weaknesses of the program?

#### Strengths

- Development of good business relationships with vendors to acquire quality products in a timely manner.
- Utilizing the internet for research of cooperative purchasing opportunities and other useful information.
- Utilizing technology for online ordering and processes.
- Staff is flexible and accommodating to departments' needs.

SELF-  
STUDY

## Self-Study

- Staff are professionals and knowledgeable of procedures, and Board Policies.

### Weaknesses

- On-going challenge in changing the culture and gaining the support to enforce the purchasing deadlines.
- On-going challenge with vendor's to automatically submit current insurance certificates to avoid lapse in coverage. This causes a delay in processing the orders.

6. How successful has the department been in obtaining grants?

- Not Applicable

7. What are future trends expected to impact resource development?

- Not Applicable

SELF-  
STUDY

## Recommendations

- Improve communication with accounting to continually update special projects' deadlines.
- Increase efforts in following up with vendor's of their insurance status.

RECOM  
MEND.



# Rancho Santiago Community College District

## District Operations Planning Portfolio

2009-2011

### Child Development Services

---

Department

*Update (June 2010)*



ORG. CHART

FUNCTIONS

GOALS

TECH  
PLAN

BUDGETS

SELF-  
STUDY

RECOM  
MEND.



## Portfolios for Planning

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ORG. CHART

FUNCTIONS

GOALS

TECH  
PLAN

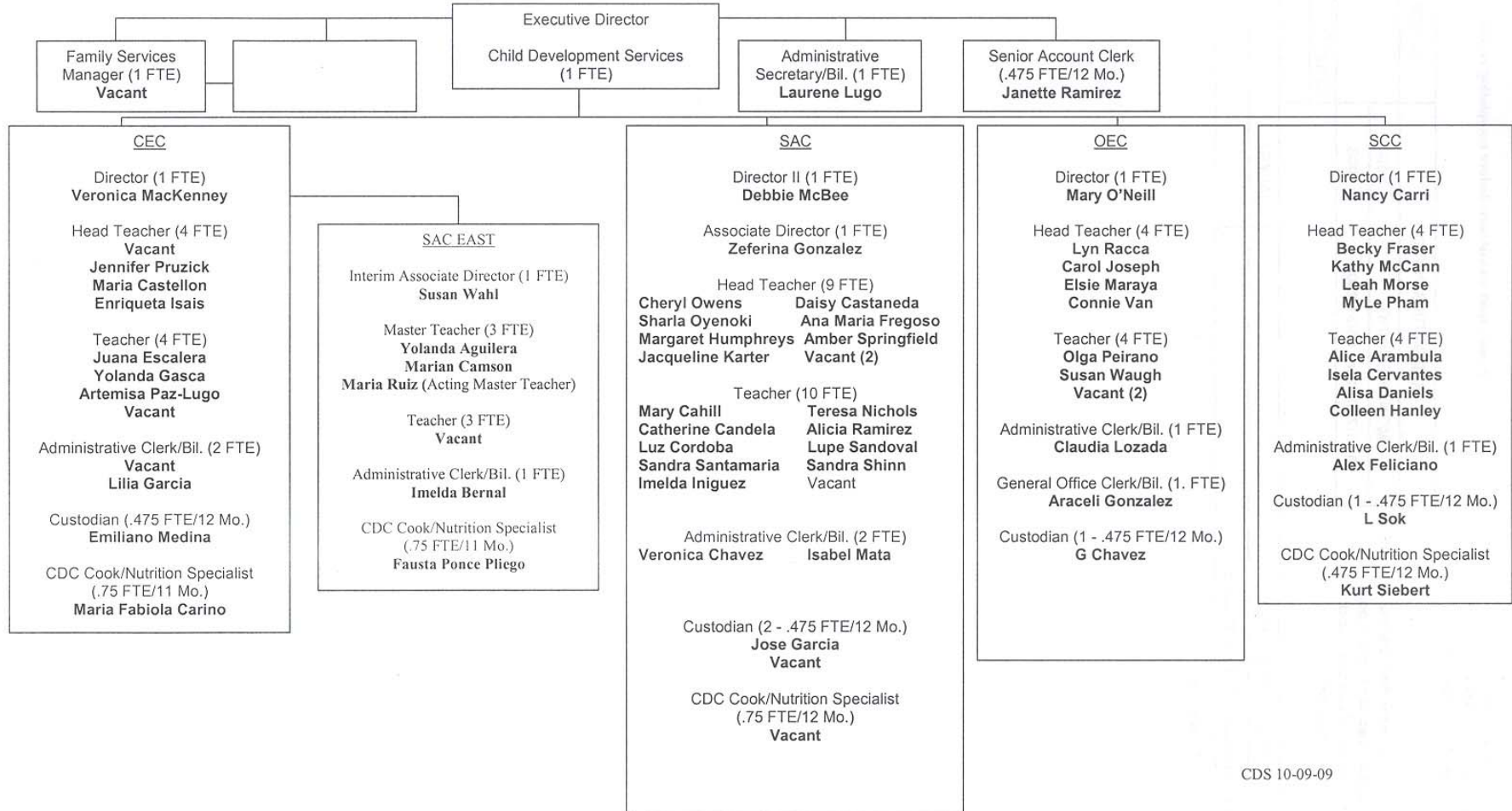
BUDGETS

SELF-  
STUDY

RECOM  
MEND.

# Organization Chart

Rancho Santiago Community College District  
EDUCATIONAL SERVICES  
DISTRICT CHILD DEVELOPMENT SERVICES



CDS 10-09-09

ORG. CHART

# Functions

## Functions and services provided by the department:

1. Provide child care services for the children of low income students and community members in a quality educational setting.
2. Provide educational laboratory for students of Human Development, Nursing, Psychology and others.
3. Provide support to parents of young children with workshops, support groups and other strategies.

## Customers and recipients of services:

Customers are students of the colleges and non-credit educational centers, faculty and staff of those institutions and community members.

Customers are also students participating in observations and practicum classes of the colleges and surrounding universities.

FUNCTIONS

## Goals for years 2009-2011

GOAL	Responsible Person(s)	Completion Date	Resource Needs
Advance and strengthen parent involvement and education.	CDS Administration Team CDS Site Staff	In progress	
Expand teaching team skills using DRDP-r and ECERS/ITERS as intentional strategies for successful children's learning.	CDS Administration Team CDS Teaching Staff CDS Site Staff	On going	
Enhance and strengthen staff leadership skills in center program operations, public presentations and teambuilding.	Gwen Morgan-Beazell Dee Tucker CDS Administration Team	On going	
Strengthen, promote and educate children, families and staff in the areas of nutrition and healthier food choices.	CDS Administration Team CDS Cooks CDS Site Staff	On going	
Fully implement EdUPlay by creating a quality service in response to market need.	Debbie McBee Nancy Carri CDS Administration Team	Stuck!	Seed money for start up
Successfully maintain NAEYC accreditation status.	CDS Administration Team CDS Site Staff	April, 2010	
Monitor and maintain fiscal stability and accountability at all levels of the CDS operations.	Dee Tucker CDS Administration Team CDS Site Staff	On going	

GOALS

## Progress Toward Goals (June 2010)

2009-2011 Goals	Progress Rating 1 – 10 (10 = completed)	Comments
Advance and strengthen parent involvement and education	7	District Parent Advisory Council and Early Head Start Policy Council have strengthened this year. Parents have had more opportunities with Quidar and KinderConnect. As parents change frequently, focus must be continuous.
Expand teaching team skills using DRDP-r and ECERS/ITERS as intentional strategies for successful children's learning	8	Focused training, peer coaching and the use of mentors have strengthened teacher skills.
Enhance and strengthen staff leadership skills in center program operations, public presentations and teambuilding	8	Re-accreditation, book club, KinderConnect, Network for Healthy CA, acting as assistant director, DRDP workgroup and other special event workgroups have provided opportunities for enhanced leadership skills.
Strengthen, promote and education children, families and staff in the areas of nutrition and healthier food choices	8	Network for Healthy CA funding has provided ample resources for staff to use for education and enhancement of curriculum for children and families. Cooks have attended several trainings including Safe Serve Staff has completed on-line training with the Child and Adult Food Program.
Successfully maintain NAEYC accreditation status	10	SAC E was not eligible. All others were re-accredited this spring.
Monitor and maintain fiscal stability and accountability at all levels of the CDS operations	7	With Early Head Start funding in December, the fiscal stability has been strengthened. Monitoring expenditures at site levels stills needs to be strengthened so that all staff understands fiscal impacts.

**GOALS**

## Department Technology Plan

Include software, hardware, and training needs:

Technology is current for the administrative and clerical staff; however, teaching staff would benefit from access to computer for recording child assessments, notes, anecdotal records, connections to resources, and follow through. Ideally, if funding allowed, each classroom would have a computer and printer/scanner for use by the teaching staff. Training and time away from teaching duties would be required for full implementation. Steps for implementation would require:

- Purchase of computer/printer/scanners for 18 classrooms.
- Installation of Child Development Services database on all computers.
- Training of teaching staff in the use of database, programs specific for child use such as excel for assessment compilations, and scanners capabilities.
- Continual upgrades of equipment.
- Continual training for proficiency.

TECH  
PLAN

# Budget and Expenditures

Object Code	2008-09		2009-2010		2010-2011	
	Budgeted	Expended	Budgeted	Projected	Budgeted	Expended
1000 Academic Salaries		\$ 2,220,334	\$ 2,147,512	2,328,428	2,147,512	
2000 Classified Salaries		1,213,441	1,275,682	1,198,463	1,275,682	
3000 Employee Benefits		1,269,735	1,350,248	1,259,648	1,350,248	
4000 Books and Supplies		277,182	376,892	196,825	376,892	
5000 Services and Other Operating Expenses		78,738	935,704	309,212	935,704	
6000 Sites, Building, Books, and Equipment		67,117	131,248	114,793	131,248	
7000 Other Outgo		263,091	416,007	91,564	416,007	
<b>TOTAL</b>		<b>\$ 5,458,949</b>	<b>6,633,293</b>	<b>5,498,933</b>	<b>6,633,293</b>	

BUDGETS



# Self-Study

## Self-study standard questions:

1. How do persons served by the program evaluate its adequacy, efficiency, and effectiveness?

Student parents, staff, faculty and community members rate the service excellent. The children are happy, engaged and progressing as appropriate for their developmental age. Resources support the parent, children and family to address any and all barriers that deter from success – as a parent, child, family member or student. Feedback is always welcome from all who use the services, and such feedback is often offered by clients – families, faculty, staff and community members.

2. Are the services comparable in quality and scope to those offered by similar programs at other colleges?

Services offered by Rancho Santiago Community College are of the highest quality and scope as compared to other colleges. As an integral partner with the Human Development Department as the trainer of future teachers, each classroom is staffed with two credentialed teachers which support the highest quality possible for both the student learner and the child in the classroom. Services are offered at all RSCCD locations based on the needs of the students attending classes at each facility. Based on administrative associations with other community colleges we are confident that RSCCD's Child Development Services provides more comprehensive and of higher quality services than other colleges.

3. What efforts does the program make to continually upgrade its services?

CDS administrative staff conduct bi-monthly meetings at which services are reviewed and revised as needed. Each center conducts weekly staff meetings and staff development is conducted for the entire staff twice each year. Child Development Services is required to engage in self study each year by its funder, the California Department of Education, Child Development Division. The self study has five components – rating the classroom environment, monitoring the developmental progress of the children, surveying the satisfaction of the parents/guardians, grading the program against the Compliance Monitoring Review instrument and developing goals.

1. How much progress has been made towards program goals?

Progress continues yearly to address issues, maintain quality and satisfaction.

SELF-  
STUDY

# Self-Study

## Self-study standard questions:

5. What are the strengths and weaknesses of the program?

### Strengths

- High quality educational services to children and families of student parents, faculty, staff and community members.
- A career ladder that allows students to move from assistants, to interns, to teachers.
- Support resources for the family that address barriers to success – for the child, the family, the student.
- Responsiveness to needs of student families.
- The teaching staff holds higher degrees than required by the funder – 42% have B.A. degrees.
- A staff providing clerical, food service and custodial services that continually addresses improvements and is willing to take action.

### Weaknesses

- The cost of salaries and benefits has strained the budgetary income sources.
- Inability to train adequately as funding is not available (i.e. income is earned through actual attendance).

6. How successful has the department been in obtaining grants?

The department has successfully obtained grants from the Child Development Division to address repair and renovation needs, resources for support to the infant/toddler program and dollars for additional instructional materials. In addition, foundations have provided grants to support KinderConnect, a program that strengthens parent skills in the transition to public kindergarten – and to develop a business plan to address social enterprise, an income stream that will support the mission of Child Development Services.

7. What are future trends expected to impact resource development?

Salary and benefit increases beyond department control (such as raise in minimum wage) impact the need for additional income to purchase the same number of needed hours for child supervision at a higher cost.

SELF-  
STUDY

## Recommendations

Input from recent parent and staff surveys indicate the recommended needs:

- Parents request more information and viable connections to community resources.
- Staff request additional training on classroom management, curriculum strategies, required assessments, data gathering and use.
- Additional spaces for children are needed, especially for the infant and toddler ages.

RECOM  
MEND.

# Rancho Santiago Community College District

## District Operations Planning Portfolio

2009-2011

### Digital Media Center

---

Department

*Update (June 2010)*



ORG. CHART

FUNCTIONS

GOALS

TECH  
PLAN

BUDGETS

SELF-  
STUDY

RECOM  
MEND.



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ORG. CHART

FUNCTIONS

GOALS

TECH  
PLAN

BUDGETS

SELF-  
STUDY

RECOM  
MEND.

# Organization Chart

Gustavo Chamorro  
Director

Jetza Torres  
Business Services Coordinator

Jose Contreras  
Senior Custodian – Utility Worker

ORG. CHART

# Functions

## Functions and services provided by the department:

1. Leadership as a hub for digital media/technology in Orange County.
2. Networking for client and business connections that provide opportunities for building successful businesses, including access to investor and other financial resources.
3. Internship and work experience opportunities for students
4. Technical assistance including one-on-one counseling, workshops, mentoring, referrals, and business plan assistance.
5. Strategic and managerial support services such as marketing assistance, coaching, sales, social media strategy, IT business development and implementation, and legal and financial advice.
6. Office space with network infrastructure.

FUNCTIONS

# Functions

## Customers and recipients of services:

- Business Incubator residents
- Students
- Investors
- Entrepreneurs
- Community Based Organizations
- Established businesses
- Governmental and Educational organizations

FUNCTIONS



# Goals

1. Annual goals (including staff development goals) – created at beginning of each school year
  - Stimulate development of new ventures that foster capital creation and investment opportunities.
  - Create new, high value jobs in the digital media/technology industry
  - Support the development of innovative technology for business solutions and enhance technology commercialization resulting in successful businesses.
  - Develop synergy among entrepreneurial businesses, digital media industry, and education to develop a skilled and knowledgeable workforce to enhance the local economy.
  - Foster the growth of new digital design and production industries in Orange County.
  - Obtain access to TV/Video studio area in order to create new revenue, and to assist incubator companies with their video/studio space needs.
2. Progress towards goals – created at end of each school year
3. Other accomplishments – created at end of each school year

GOALS

## Goals for years 2009-2011

GOAL	Responsible Person(s)	Completion Date	Resource Needs
Stimulate development of new ventures that foster capital creation and investment opportunities.	Director	Ongoing	Funding to maintain operations
Create new, high value jobs in the digital media industry.	Director	Ongoing	Funding to maintain operations
Support the development of innovative technology for business solutions and enhance technology commercialization resulting in successful businesses.	Director	Ongoing	Funding to maintain operations
Develop synergy among entrepreneurial businesses, digital media industry, and education to develop a skilled and knowledgeable workforce to enhance the local economy.	Director	Ongoing	Funding to maintain operations
Foster the growth of new digital design and production industries in Orange County.	Director	Ongoing	Funding to maintain operations
Obtain access to TV/Video studio area in order to create new revenue, and to assist incubator companies with their video/studio space needs.	Director	December 2009	Management support

GOALS

## Progress Toward Goals (June 2010)

2009-2011 Goals	Progress Rating 1 – 10 (10 = completed)	Comments
Stimulate development of new ventures that foster capital creation and investment opportunities.	10	The DMC's Business Incubator is currently at full capacity with 12 companies. To accommodate additional companies, the DMC launched its virtual incubator or Affiliate Program in June 2010; the program will provide entrepreneurs without office space with the opportunity to access DMC consulting services as well as other services essential for growth and development.
Create new, high value jobs in the digital media industry.	6	The current economic climate has affected the growth of the DMC's incubator companies as equity funding sources have been drastically reduced, thus companies have been unable to obtain the seed funding necessary to hire additional staff. Companies have however taken advantage of the increased number of interns available in the current job market.
Support the development of innovative technology for business solutions and enhance technology commercialization resulting in successful businesses.	10	Through its extensive list of contacts and partners, the DMC has been able to assist its business incubator companies through a variety of services, which include: on-site pro-bono consulting services, access to networking events for free or at a reduced cost, educational workshops, access/advice from potential funding sources, etc.
Develop synergy among entrepreneurial businesses, digital media industry, and education to develop a skilled and knowledgeable workforce to enhance the local economy.	10	Monthly CEO roundtable meetings are conducted to ensure companies are taking advantage of the synergy available in the business incubator. In addition, companies have been able to participate in joined events where they have showcased their companies and the services/products they provide.
Obtain access to TV/Video studio area in order to create new revenue, and to assist incubator companies with their video/studio space needs.	5	Some limited access has been obtained; however, we are still working on final approval for access to DMC incubator companies and selected off-site companies.

GOALS

## Department Technology Plan

Include software, hardware, and training needs.

- There are no software or hardware needs other than repair or replacement of non-working equipment or software. We would like to take advantage of training opportunities once funding is restored to optimal levels; in the meantime, we can leverage some of our training needs by working with partners who can provide training at no cost.

TECH  
PLAN

# Budget and Expenditures

Object Code	2009-2010		2010-2011		2011-2012	
	Budgeted	Expended	Budgeted	Expended	Budgeted	Expended
<b>TOTAL</b>						

BUDGETS

# Self-Study

## Self-study standard questions:

1. How do persons served by the program evaluate its adequacy, efficiency, and effectiveness?

Business Incubator residents evaluate program effectiveness during monthly CEO Roundtable meetings, which provide them with the opportunity to express their satisfaction or need for improvement on the program.

2. Are the services comparable in quality and scope to those offered by similar programs at other colleges?

The Digital Media Center is a unique facility in Orange County; it is the only facility in the region that combines education and business in the digital media industry. As a result, many of the services provided are also unique when compared to other community colleges.

3. What efforts does the program make to continually upgrade its services?

The program takes a continuous improvement approach by always looking to improve current services or bring in new ones.

4. How much progress has been made towards program goals?

Significant progress has been made in the creation of new services that have benefited business incubator companies and other stakeholders. Significant progress has also been made in projects that have marketed the Digital Media Center as a leader in Digital Media/Technology n Orange County.

SELF-  
STUDY

# Self-Study

## Self-study standard questions:

5. What are the strengths and weaknesses of the program?

### Strengths

- An established and growing business incubator
- Extensive interaction between students and businesses
- An economic development tool that creates jobs
- A solid staff team able to assist businesses and students with their respective needs

### Weaknesses

Inability to use TV/Video studio, which has hindered our ability to form strategic partnerships with businesses and nonprofit organizations, as well as the opportunity to provide additional benefits to incubator companies.

6. How successful has the department been in obtaining grants?

We have not applied for grants; however, we are looking at the possibility of applying for an Economic Development Agency (EDA) grant to expand our current parking facility.

7. What are future trends expected to impact resource development?

The biggest threat currently and in the future is the state of our economy, which has drastically reduced the amount of resources available.

SELF-  
STUDY

# Recommendations

RECOM  
MEND.



# Support Services Departments Planning Portfolio

## Human Resources/Risk Management

---

Department



**District Office**  
**SCC/SAC/DO**

*Update (July 2010)*

ORG. CHART

FUNCTIONS

GOALS

TECH  
PLAN

BUDGETS

SELF-  
STUDY

RECOM  
MEND.



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ORG. CHART

FUNCTIONS

GOALS

TECH  
PLAN

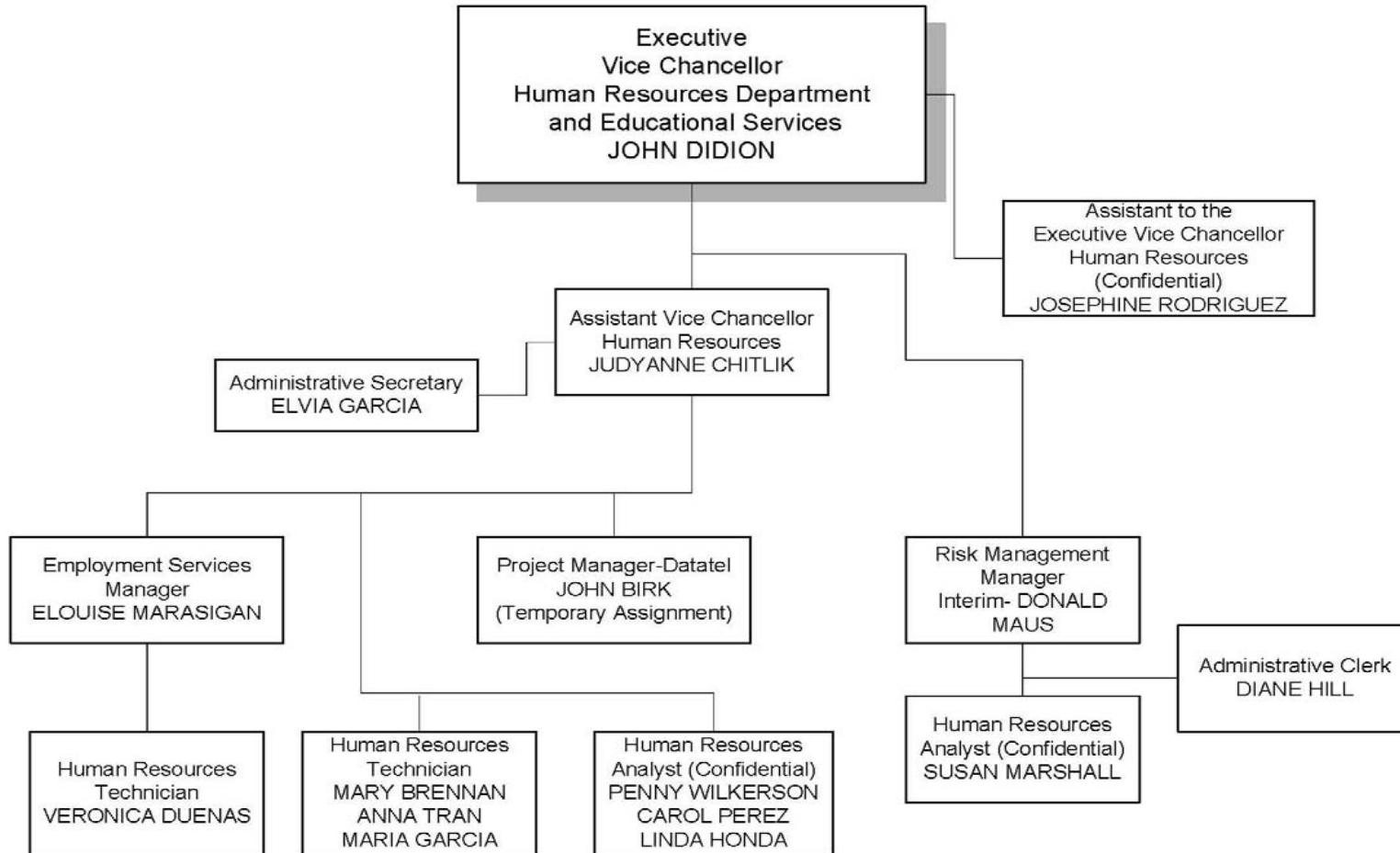
BUDGETS

SELF-  
STUDY

RECOM  
MEND.

# Organization Chart

## Rancho Santiago Community College District HUMAN RESOURCES DEPARTMENT



ORG. CHART

# Functions

## Functions and services provided by the department:

1. Management of personnel recruitment and selection processes for all positions in the district.
2. Administration and maintenance of all employee records.
3. Management of all faculty and staff assignments to ensure compliance with legal requirements and collective bargaining provisions.
4. Administration of collective bargaining agreements and relevant HR/Risk Management Board policies.
5. Administration of fringe benefits for eligible employees and retirees.
6. Administration of property, liability, workers' compensation, student accident insurance, and construction-related insurance programs.
7. Coordination of district-wide staff development activities.
8. Administration of loss control activities and programs designed to promote a safe educational and working environment.

FUNCTIONS

# Functions

## Customers and recipients of services:

1. All employees
2. All applicants for employment
3. Students
4. General public who visit district facilities or interact with students and staff

FUNCTIONS

## Goals for year 2009-2011

GOAL	Responsible Person(s)	Completion Date	Resource Needs
Full implementation of Datatel HR module	Judy Chitlik John Birk	6/30/2011	Adequate staff time to complete tasks
Manage organizational down-sizing	John Didion Judy Chitlik	6/30/2011	Adequate staff time to complete tasks
Refine automated employee benefits program	Leslie Piazza Susan Marshall	6/30/2010	
Maintain positive employer-employee relations	John Didion Judy Chitlik	6/30/2011	
Provide viable voluntary health plans for part-time employees	John Didion Leslie Piazza	6/30/2011	

GOALS

## Progress Towards Goals for Year June 2010

2009-2010 Goals	Progress Rating 1 – 10 (10 = completed)	Comments
Datatel Implementation	10	Complete
Employee benefit program implementation	10	Complete
Restructure staff due to budget reductions	8	Major portion of RIF is complete. Limited additions of new positions and recall of qualified laid-off employees
Provide viable voluntary health plans for part-time employees	10	Implemented in fall 2009

GOALS

## Department Technology Plan

Include software, hardware, and training needs.

- Continue training on Datatel
- Restore I-Greentree recruitment/applicant tracking system once hiring freeze is eliminated

TECH  
PLAN



# Budget and Expenditures

## HUMAN RESOURCES

Object Code	2008-2009		2009-2010		2010-2011	
	Budgeted	Expended	Budgeted	Expended	Budgeted	Expended
<b>1000</b>	325,475	325,475	325,475			
<b>2000</b>	756,193	758,637	732,267			
<b>3000</b>	403,857	404,251	398,666			
<b>4000</b>	8,968	6,090	4,780			
<b>5000</b>	97,808	63,590	64,892			
<b>6000</b>	2,756	2,343	4,346			
<b>TOTAL</b>	1,595,147	1,560,387	1,530,425			

BUDGETS

# Budget and Expenditures

## RISK MANAGEMENT

Object Code	2008-2009		2009-2010		2010-2011	
	Budgeted	Expended	Budgeted	Expended	Budgeted	Expended
2000	254,116	255,600	234,075			
3000	96,280	83,994	86,722			
4000	7,489	664	6,889			
5000	3,652,243	3,320,319	3,621,677			
6000	68,596	34,673	77,575			
<b>TOTAL</b>	4,078,724	3,695,250	4,026,938			

BUDGETS

# Self-Study

## Self-study standard questions:

1. How do persons served by the program evaluate its adequacy, efficiency, and effectiveness?

Surveys and program evaluations have not been done in recent years. General feedback is gleaned through complaints and commendations received from staff and the general public. Effectiveness of risk management programs are evaluated through changes in rates and experience modification factors used to calculate renewal rates.

2. Are the services comparable in quality and scope to those offered by similar programs at other colleges?

HR managers belong to professional organizations and routinely consult with colleagues from other colleges on the scope of services provided.

Risk management programs are operated through a pool of K-12 and community college districts and is designed to reflect best practices in terms of outcomes and cost-effectiveness.

3. What efforts does the program make to continually upgrade its services?

Recent efforts have been geared to improving IT-related services (Datatel and Employee benefit management). Staff development activities have been reduced due to budgetary constraints.

4. How much progress has been made towards program goals?

Significant progress has been made toward program goals. Activities related to all goals are in process.

SELF-  
STUDY

# Self-Study

## Self-study standard questions:

5. What are the strengths and weaknesses of the program?

### Strengths

Despite staff reductions, the program has used technology to supplement staff in order to deliver services. The staff are dedicated, well-trained and service oriented. Risk management efforts in both liability and worker's compensation have resulted in reduced rates and one of the lowest experience modification factors available.

### Weaknesses

Declining financial resources have depleted funds for recruitment. As economic conditions improve, funds will need to be restored in these areas in order to provide for adequate recruitment activities.

Funds for district-wide staff development activities have been eliminated.

Hiring has largely been internal and staff shortages exist throughout the district.

6. How successful has the department been in obtaining grants?

The department receives an annual grant from the Chancellor's Office for staff diversity and has received loss control grants through ASCIP to reduce hazards.

7. What future trends are expected to impact resource development?

Significant grant opportunities in this area are not anticipated.

SELF-  
STUDY

## Recommendations

1. Continue efforts to improve efficiency and cost-effectiveness through software implementation.
2. Identify resource needs for employment recruitment when hiring restrictions are lifted.
3. Continue to facilitate staff reorganizations and restructuring to accommodate reduced funding and program consolidation.

RECOM  
MEND.

# Rancho Santiago Community College District

## District Operations Planning Portfolio

2010-2011

Institute for Women Entrepreneurs (IWE)

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Department

*Update (June 2010)*



ORG. CHART

FUNCTIONS

GOALS

TECH  
PLAN

BUDGETS

SELF-  
STUDY

RECOM  
MEND.



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ORG. CHART

FUNCTIONS

GOALS

TECH  
PLAN

BUDGETS

SELF-  
STUDY

RECOM  
MEND.

# Organization Chart

Rancho Santiago Community  
College District Foundation  
Board of Directors

Executive Director  
Business Development  
Enrique Perez

Director  
Institute for Women Entrepreneurs  
Kari Caldwell

Administrative Clerk  
Sally Akins

Business Experts  
Hourly

ORG. CHART



# Functions

## Functions and services provided by the department:

The Orange County IWE provides technical assistance, private business counseling, resources and training to women entrepreneurs in all stages of business development.

These services are delivered through:

1. Workshops and training seminars,
2. One-on-one business counseling,
3. Online training

FUNCTIONS

# Functions

## Customers and recipients of services:

Primary customers are women entrepreneurs in Orange County, including those who are socially and economically disadvantaged.

FUNCTIONS

# Goals

1. Annual goals (including staff development goals) – created at beginning of each school year
2. Progress towards goals – created at end of each school year
3. Other accomplishments – created at end of each school year

GOALS

## Goals for years 2010-2011

GOAL	Responsible Person(s)	Completion Date	Resource Needs
Re-introduce the IWE program to the community	Director	October 2010	Program funds and district support
Develop robust workshop & training schedule	Director/Business Consultants	October 2010	Program funds and district support
Grow the number of clients/business served	Director/Business Consultants	On-going	Program funds and district support
Grow the number of start-up businesses formed	Director/Business Consultants	On-going	Program funds and district support
Staff Development	All	On-going	Program funds and district support

GOALS

## Progress Toward Goals (June 2010)

\*After being on hiatus from November 2009-June 2010, the program is being reinstated June 2010.

2009-2011 Goals	Progress Rating 1 - 10 (10 = completed)	Comments
Re-introduce the IWE program to the community	5	In last month, the program is being reintroduced to the community through networking, events, and marketing.
Develop robust workshop & training schedule	3	The workshop & training schedule is currently being developed.
Grow the number of clients/business served		Work in progress
Grow the number of start-up businesses formed		Work in progress
Staff Development		Work in progress

GOALS

## Department Technology Plan

Include software, hardware, and training needs.

- Receive training on the Small Business Administration reporting system, EDMIS
- Receive additional training with the Datatel system
- Brand IWE through social media: Facebook, LinkedIn and Blogs
- Create electronic newsletter to communicate with clients through the purchase of the Constant contact software
- Further develop IWE website to include online training programs available for clients

TECH  
PLAN

Budget and Expenditures

Object Code	2009-20010		2010-2011		2011-2012	
	Budgeted	Expended	Budgeted	Expended	Budgeted	Expended
TOTAL						

# Self-Study

## Self-study standard questions:

1. How do persons served by the program evaluate its adequacy, efficiency, and effectiveness?
  - To receive client feedback in a timely manner, each client is given a confidential evaluation form with pertinent questions regarding services, location, customer services as well as a general comments section after their first visit. These evaluations are tabulated monthly and reviewed by the director. The evaluation form can also be accessed on the IWE website.
  - During counseling sessions, the scope of work is clearly defined to ensure pertinent data is recorded. Files are reviewed daily by a record keeper and reviewed each week by the director.
  - As required by the SBA each quarter, standard self IWE audits, as well as client file audits are conducted on active files to ensure compliance and pertinent data is being captured.
  - After a client's fifth visit, a counseling and customer service evaluation is automatically provided. The evaluations are tabulated monthly and reviewed by the directors. Suggestions for improvement are implemented where possible.
  
2. Are the services comparable in quality and scope to those offered by similar programs at other colleges?

Yes, the services are comparable in quality and scope to similar programs at other colleges.

RECOM  
MEND.



3. What efforts does the program make to continually upgrade its services?

The IWE closely communicates with partners and comparable programs to understand and learn state-of-the-art services. Feedback from clients is closely monitored and suggestions are implemented when possible.

4. How much progress has been made towards program goals?

Starting new in June 2010 has allowed for the program to re-evaluate itself and set new goals and measurements of success. The IWE will continually strive to meet and exceed the goals set by the local and national program administrators.

5. What are the strengths and weaknesses of the program?

Strengths

Commitment by dedicated staff, strong support from host organization (RSCCD), flexibility to offer services and programs need by the business community.

Weaknesses

Monetary resources to conduct large outreach and service campaigns, and limited staff members.

6. How successful has the department been in obtaining grants?

The IWE has been successful in obtaining grants. As an example, State Farm issued a check for \$5,000, and AT&T has a grant project for \$25,000.

7. What are future trends expected to impact resource development?

As of October 1, 2010, the IWE will start the fifth year in the funding cycle from the Small Business Administration (SBA). In year six, the SBA reduces funding by \$30,000. This will be an area the center will need to focus on to sustain services to clients. A resource development plan will need to be monitored.

RECOM  
MEND.

# Recommendations

RECOM  
MEND.

# Rancho Santiago Community College District

## District Operations Planning Portfolio

2009-2011

Orange County Center of Excellence (COE)  
Department

*Update (June 2010)*



ORG. CHART

FUNCTIONS

GOALS

TECH  
PLAN

BUDGETS

SELF-  
STUDY

RECOM  
MEND.



## Portfolios for Planning

The purpose of the RSCCD portfolios is to provide an instrument for department planning, evaluation, and resource prioritization that is streamlined and that coordinates those related activities.

In good practice, planning processes are cyclic, and priorities for resource allocation result from the identification of goals. That is, evaluation, or program review, conclusions are used to identify future goals; those goals are used for budgeting. After plan implementation, further evaluation results in refined, revised plans, and so forth.

The portfolio process is designed to enhance the cohesion of planning-related activities as well as to allow for maximum customization of planning and evaluation activities for each unique support services department.

The portfolios should be maintained on an ongoing basis, with goals and budgets being updated each year. In this way, the portfolio can be used as a source document for resource allocation requests when needed.

ORG. CHART

FUNCTIONS

GOALS

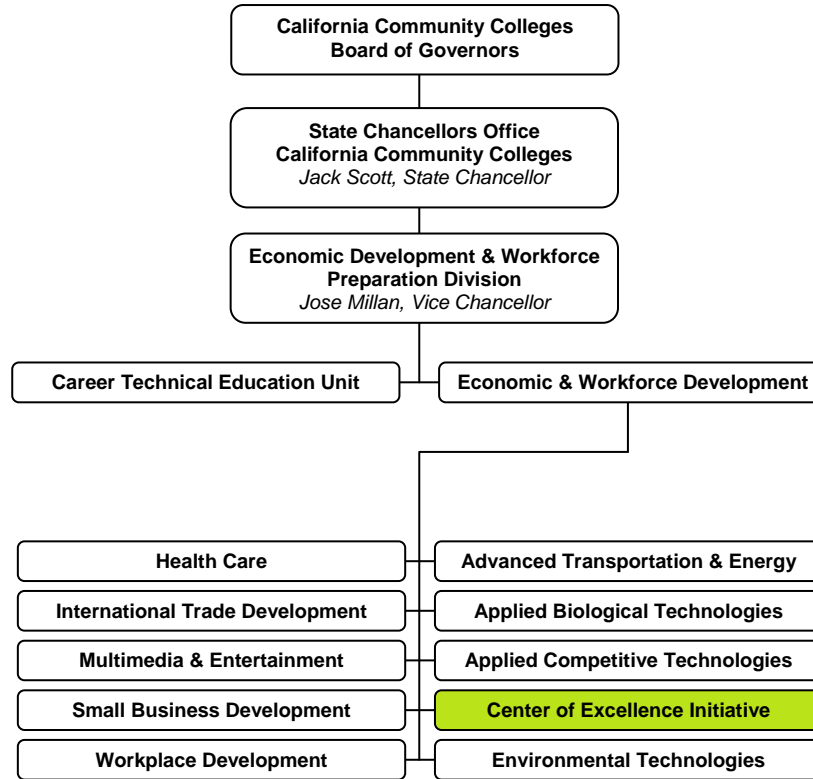
TECH  
PLAN

BUDGETS

SELF-  
STUDY

RECOM  
MEND.

# Organization Chart



ORG. CHART

# Functions

## Functions and services provided by the department:

1. Develop partnerships with business and industry associations, economic development organizations, and workforce investment boards to identify the workforce issues and develop the solutions.
2. Conduct environmental scanning of multi-regional, and statewide labor market data and industry data to provide information about workforce needs as they apply to individual colleges and the region.
3. Provide technical assistance to regional colleges and Economic Workforce Development (EWD) Initiatives on the use of scan products.
4. Conduct scan partnership activities that will strengthen the brand of economic development through the California Community Colleges System.
5. Maintain all required project activities for the Center of Excellence including Center staffing, meetings, trainings, performance support activities, and coordination efforts.
6. Participate in and contribute to the Statewide EWD branding and Initiative-level marketing campaign.
7. Maintain reporting and accountability for the project.
8. Track all outside investments that the project attracts.

**FUNCTIONS**

# Functions

## Customers and recipients of services:

- Community colleges
- Business and industry associations
- Economic development organizations
- Workforce Investment Boards

FUNCTIONS

## Goals

1. Annual goals (including staff development goals) – created at beginning of each school year
2. Progress towards goals – created at end of each school year
3. Other accomplishments – created at end of each school year



## Goals for years 2009-2011

GOAL	Responsible Person(s)	Completion Date	Resource Needs
Partner with industry associations, major employers, workforce investment boards, and EDD labor market consultants as part of identifying high growth industries and occupations, conducting environmental scan research and development, and industry validation.	Osiel R. Madrigal	July 2009-June 2010 July 2010-June 2011	Harris Info Source subscription (Selectory Business Database)
One business-education event will be held annually for the Orange County Region and will include community college representatives and external partners to respond to workforce challenges and potential collaborative responses	Osiel R. Madrigal	July 2009-June 2010 July 2010-June 2011	Facility Chairs Screen Lap Top
Provide colleges in the Orange County Region with customized labor market information upon request.	Osiel R. Madrigal	July 2009-June 2010 July 2010-June 2011	PC Email & Internet EMSI subscription
Produce a minimum of three full environmental scans if one is a lead author of a multi-regional primary research study. Otherwise, the OC Center will produce four full environmental scan reports, which may include those initiated by a lead author.	Osiel R. Madrigal	July 2009-June 2010 July 2010-June 2011	PC Email & Internet EMSI & GIS subscription \$ for primary research
Disseminate each scan product. The rollout plan will include presentations at conferences, regional consortia meetings, occupational dean meetings, and economic development professionals meetings in the Orange County Region.	Osiel R. Madrigal	July 2009-June 2010 July 2010-June 2011	\$ for conferences & traveling Constant Contact subscription Internet
Develop and disseminate a quarterly bulletin/newsletter.	Osiel R. Madrigal	July 2009-June 2010 July 2010-June 2011	Constant Contact subscription & Internet

**TECH  
PLAN**

## Progress Toward Goals (to be completed in June 2010)

\*\*THE COE GRANT WILL CONCLUDE ON JUNE 30, 2010. THE PROJECT WILL NOT BE REFUNDED.

2009-2011 Goals	Progress Rating 1 – 10 (10 = completed)	Comments
Partner with industry associations, major employers, workforce investment boards, and EDD labor market consultants as part of identifying high growth industries and occupations, conducting environmental scan research and development, and industry validation.	10	Partnerships were developed to conduct environmental scanning. This was evident by the number of resources listed for the Energy Efficiency scan completed this program year.
One business-education event will be held annually for the Orange County Region and will include community college representatives and external partners to respond to workforce challenges and potential collaborative responses.	10	Participated in multiple education events to help the community respond to workforce needs. This includes presentations at: Department of Labor Veterans Employment and Training Service Conference, Santa Ana WIB Meeting, International Consortium of Educational & Economic Development Conference, and the OC Career Counselor Breakfast.
Provide colleges in the Orange County Region with customized labor market information upon request.	10	The customized labor market information was provided on a timely basis, with information provided by the Economic Modeling System software.
Produce a minimum of three full environmental scans if one is a lead author of a multi-regional primary research study. Otherwise, the OC Center will produce four full environmental scan reports, which may include those initiated by a lead author.	10	At the time of this report, funding for the program was funded at 100%. The program experienced a mid-year cut of 50% for 2009/2010. The program will not be funded for 2010/11. The goals have been adjusted to reflect the budget constraints. Completion of two environmental scan reports was achieved.
Disseminate scan product. The rollout plan will include presentations at conferences, regional consortia meetings, occupational dean meetings, and economic development professionals meetings in the Orange County Region.	10	Both scans (Energy Efficiency and Health Information Technology) were disseminated throughout Orange County. This was achieved through presentations and electronic notices.
Develop and disseminate a quarterly bulletin/newsletter.	10	Quarterly bulletins were sent.

TECH  
PLAN

## Department Technology Plan

Include software, hardware, and training needs.

- EMSI (Economic Modeling Specialist, Inc.) – user-friendly web-based tools and reports that interpret and analyze labor market and demographic data for any geographic area in the United States.
- ESRI – GIS software.
- ESRI/GIS training
- Constant Contact – online email marketing tool.
- Harris Info Source (Selectory Business Database) – online business lead generation tool to access detailed company information for firms in Orange County.

TECH  
PLAN



# Self-Study

## Self-study standard questions:

1. How do persons served by the program evaluate its adequacy, efficiency, and effectiveness?

During 08-09, persons served by the Centers of Excellence Initiative received an online satisfaction survey and a phone survey. This practice will continue in 09-10 and 10-11.

2. Are the services comparable in quality and scope to those offered by similar programs at other colleges?

Yes, all 10 centers in the state have an identical annual work plan.

3. What efforts does the program make to continually upgrade its services?

The Centers of Excellence Initiative hold monthly conference calls, as well as quarterly meetings and an annual retreat, where strategies and practices on how to improve program services are discussed.

4. How much progress has been made towards program goals?

Program goals for 08-09 were met. The same is expected for 09-10 and 10-11.

SELF-  
STUDY

# Self-Study

## Self-study standard questions:

5. What are the strengths and weaknesses of the program?

### Strengths

- COE Regional Directors do a good job of educating target audiences about their products and services, as customers primarily learn about them directly through the COE Directors or at regional meetings.
- COE does an excellent job of setting customer expectations about the content found within its products and services.
- COE scans and reports help community colleges plan new programs, receive grants and funding, and influence in many other ways.

### Weaknesses

- Scans and reports are not shared or marketed toward business and industry as much as they should. This is a missed opportunity to attract new customers to the community college system.
- There is a need to either directly market to college presidents/vice-presidents, and/or provide information on how to share with executive teams more effectively for decision-making and influencing. The reason is because only a small percentage of COE products actually make it to the executive levels at the college. This is especially important since one of the major barriers to implementation of the recommendations is institutional challenges/processes, which can be directly influenced at the executive level.

6. How successful has the department been in obtaining grants?

The COE Initiative in 08-09 received two grants – California Energy Commission (CEC) Project and Rural Opportunities Project.

7. What are future trends expected to impact resource development?

Due to anticipated budget cuts in 09-10 and 10-11, the COE Initiative is planning to continue pursuing additional grants or partner with other initiatives/organizations, and implement a cost-recovery program at all 10 centers.

SELF-  
STUDY

# Recommendations

RECOM  
MEND.

# Rancho Santiago Community College District

## District Operations Planning Portfolio

2009-2011

Research Department  
*Update (July 2010)*



ORG. CHART



# Research Department Organization Chart

(effective 06/30/2010)

**Nga Pham**  
**Director, Research**

95% District/5%  
District Match,  
Gear-Up

**Cristina Gheorghe,**  
**Research Assistant**  
50% Matriculation/  
50% District Match,  
Matriculation

**Research Analyst**  
**(vacant due to**  
**reduction in force)**  
100% Matriculation

**Research Analyst**  
**(vacant due to**  
**reduction in force)**  
100% Matriculation

**Suzi Russell,**  
**Research**  
**Coordinator**  
55% District/  
5% District Match,  
Matriculation/  
40% VTEA

ORG. CHART

# Research Department Functions

## **Functions and services provided by the department:**

Conducts and coordinates institutional research for the District and its colleges. An annual research agenda is developed based primarily on needs (and suggestions) of college and district faculty and staff, as well as state and federal mandates. Generally, the RSCCD Research Department:

- coordinates some district and college reporting requirements, such as Student-Right-to-Know, Accountability Reporting for Community Colleges (ARCC), and the Integrated Postsecondary Education Data System.
- (IPEDS) reviews and manages requests for approval to conduct research using RSCCD students and/or staff as subjects. Such requests are submitted via a Research Protocol, whether employed by RSCCD (in cases where the proposed research falls outside the requestors area of expertise) or not.
- assists departments in their portfolio development by compiling data and conducting surveys.
- assists colleges and District Operations in accreditation self-studies.
- conducts and maintains the following research regularly: institutional effectiveness assessment, community and K-12 enrollment demographics, student learning outcomes (SLO), students outcomes analyses (including retention, persistence, graduation, and transfer statistics), matriculation evaluation (credit and non-credit programs), Basic Skills Initiative, assessment practices validation, student demographics, enrollment trends, and surveys of current and former students.
- Assist in District and College planning activities, including master plan, technology plan, educational plans, Board of Trustees planning retreats.

## **Customers and recipients of services:**

- RSCCD faculty, staff, administration, Board of Trustees, and students
- Community organizations, other community colleges, and independent researchers outside the system
- Government agencies (state and federal)

FUNCTIONS

## Research Department Goals for Years 2009-2011

<b>Goal</b>	<b>Responsible Person(s)</b>	<b>Completion Date</b>	<b>Resource Needs</b>
Work with faculty, staff, and administration to promote and develop measures which assess student learning.	All	Ongoing	
Continue to assist college leadership staff to understand and respond to accountability reports by external agencies, such as ARCC, IPEDS, etc.	All	Ongoing	
Assist faculty and staff to address the basic skills initiative. (ongoing)	All	Ongoing	
Continue to work with project directors and grant writers to emphasize the planning of evaluation of student outcomes in special programs at the onset of the grant funding.	All	Ongoing	
Define research function as the district implements Datatel.	All	Ongoing	
Follow-up on recommendations of 2007-08 program review.	All	June 2010	
Coordinate the OEC Need Assessment process for center status.	Nga	June 2010	

GOALS

## Research Department Progress Toward Goals

2009-2011 Goals	Progress Rating (1 – 10)	Comments
Work with faculty, staff, and administration to promote and develop measures which assess student learning.	10	We successfully addressed this goal in 2009 and will continue to do so into the next year.
Continue to assist college leadership staff to understand and respond to accountability reports by external agencies, such as ARCC, IPEDS, etc.	10	We successfully addressed this goal in 2009 and will continue to do so into the next year.
Assist faculty and staff to address the basic skills initiative.	10	Research has produced several reports for faculty and staff to address basic skills delivery at our colleges; we will continue to support the committee
Continue to work with project directors and grant writers to emphasize the planning of evaluation of student outcomes in special programs at the onset of the grant funding.	10	Research staff continually works with grant writers to include current data in grant proposals so that appropriate project goals may be formulated and ongoing evaluation may be planned and carried out.
Define research function as the district implements Datatel.	6	Continue to work with project managers to fine-tune data warehouse migration to Datatel data elements and migration of vital ITS reports from GLINK. Consultations/coordination will be ongoing.
Follow-up on recommendations of 2007-08 program review.	7	Consult with IT to identify most effective and efficient direct access for faculty to data (beyond ISDS); development of SLO assessments for faculty continues.
Coordinate the OEC Need Assessment process for center status.	10	College Center status was granted to OEC resulting in \$1.4 million in additional funding to the District.

GOALS

# Research Department Technology Plan

(Include software, hardware, and training needs)

Researcher consensus is that a series of technology-related projects would be of most use to our operations at this time. Although these projects do not require funding per se, they require manpower. Because of the current budget crisis, and District-wide reduction in force, it is not clear if these projects can be addressed at this time. The Research Department plans to prioritize the projects and address them as time and manpower allow.

- **Update and maintain comprehensive data element dictionary for the data warehouse.** As the shift from GLINK to Datatel information nears completion, it is vital that we update and maintain the existing data dictionary with new definitions and coding as necessary. Ideally, the new data dictionary will be maintained as an online, ever-evolving document.
- **Datatel/Oracle database training.** To facilitate our smooth transition to Datatel, researchers request database training in order to access and query the back-end Oracle database for tables/fields that may not necessarily be included in our standard data warehouse downloads, as well as standard Datatel training.
- **Maintain Current Data Processing Technologies.** We currently hold a site license for Statistical Package for Social Sciences (SPSS) and contracts with National Student Clearinghouse (NSC) for transfer data on our former students and the California Community Colleges Chancellor's Office to compile/compute data for Student-Right-to-Know mandates.

TECH  
PLAN

## Budget and Expenditures

Object Code	2008-20009		2009-2010		2010-2011	
	Budgeted	Expended	Budgeted	Expended	Budgeted	Expended
General Fund (0000)						
Conference	0	0	30	28.82		
Classified Management	\$99,955.00	\$8,210.85	98,530.00	93,776.55		
Classified Employees	43,593.00	3,633.30	43,600.00	43,599.60		
Benefits	34,395.00	3,025.06	52,162.00	50,904.74		
Supplies	300.00	0	300.00	248.01		
Mileage	240.00	0	210.00	0		
Software support/license	3186.00	0	0	0		
Contract repair service	750.00	0	750.00	0		
Printing	195.00	0	195.00	0		
Basic Skills Initiative (2001)						
Classified Employees	\$34,230.00	0	0	0		
Conference	3,000	0	0	0		
Benefits	6,701	0	0	0		
Equipment/software	4,880	0	0	0		
Supplies	1,800	0	0	0		
GEAR-UP III (1507/1508)						
Classified Management	823.00	432.15	6050.00	5185.80		
Classified employees	27,747.00	2,208.88				
Benefits	13,487.00	1146.11	2343.00	1858.11		

BUDGETS

Object Code	2009-20010		2010-2011		2011-2012	
	Budgeted	Expended	Budgeted	Expended	Budgeted	Expended
GEAR-UP IV (1512)						
Classified Management			5186.00	4753.65		
Benefits			1957.00	1696.41		
VTEA (1800)						
Classified employees	\$31,709	\$2,642.00	31,709.00	31,708.80		
Benefits	12,569	1,056.05	13,072.00	12,581.13		
Supplies	500.00	0	500.00	365.89		
Software support	500.00	0	0	0		
Non-Credit Matriculation (2490/2491)						
Classified employees	\$63,972.00	\$5,837.67	12,204.00	19,140.24		
Benefits	24,267.00	2,593.11	7184.00	3,928.61		
Supplies	500.00	0	0	0		
Contracted services	700.00	0	0	0		
Software support			112.00	112.27		
Matriculation (2414, 2410)						
Classified employees	\$91,306.00	\$7,924.59	48,873.00	57,713.26		
Benefits	34,395.00	3,025.06	22,129.00	28,306.66		
Software support/license	1,510.00	0	1560.00	1563.43		
Software License and Fees	0	0	1,336.00	1,336.00		
<b>TOTAL</b>	<b>\$553,117.00</b>	<b>\$ 43,139.06</b>	<b>\$349,992.00</b>	<b>\$358,807.98</b>		

BUDGETS

# Self-Study

## Self-study standard questions:

### **1. How do persons served by the program evaluate its adequacy, efficiency, and effectiveness?**

Periodically, Research Department staff disseminates a questionnaire via our district's online assessment tool asking faculty and staff to evaluate our product. In Fall, 2007, data from such a survey was submitted by classified, instructional, administrative, and supervisory staff members across the district and its various sites. Feedback is always welcome from all who use our services, and such feedback is often offered by customers from outside our district, as well as the faculty and staff at our own colleges.

### **2. Are the services comparable in quality and scope to those offered by similar programs at other colleges?**

The RSCCD Research Department enjoys a history of great support from administration and faculty alike who appreciate the necessity of using data for institutional planning, assessment, and improvement. Based on researchers' associations with various state and local research groups and familiarity with institutional researchers statewide, we are confident that RSCCD's Research Department offers comparable services to its customers and, in many cases, more comprehensive services when compared to community college research offices of similar (or greater) resources.

### **3. What efforts does the program make to continually upgrade its services?**

Since the inception of the Research Department over thirty years ago, we have continued to expand our resources and the services we offer our customers. We assess operational activities regularly at our bimonthly staff meetings, and look for ways to expand and/or improve the services we provide. We consider all input gleaned from self-study efforts and, generally, accept all reasonable requests for assistance in research-related matters from both district staff and requestors from outside the district. In addition to the Research Agenda that we adopt each year, we welcome and encourage ad hoc research requests, acknowledging that program-specific requests often lead to the most immediate, valuable, and effective program review and enhancements that we can achieve. We facilitate, whenever possible, the incorporation of a solid research plan at the front end of program planning, and support ongoing efforts whenever possible.

### **4. How much progress has been made towards program goals?**

We have accomplished our ongoing goals for 2008-09 and are on-target for completing goals scheduled for completion in June 2009 and June 2010.

RECOM  
MEND.



## Self-Study (continued)

### Self-study standard questions:

#### 5. What are the strengths and weaknesses of the program?

We believe that each of our weaknesses is counter-balanced by our strengths. Our greatest strengths are responsiveness to requests in a timely manner, expertise in accepted research methods, quantity and quality of research reports published and, most importantly, our exemplary reputation both locally and statewide. Our very own data warehouse

Current budget constraints will surely affect Research Department operations beginning with the 2009/10 fiscal year. As in the past, however, we will strive to maintain comprehensive services while maintaining our high quality and ethics.

While current technology is essential to delivery of our services, we have maintained a high level of currency that we are confident will sustain us through this crisis. All hardware and software is current. The ongoing conversion to Datatel may temporarily interrupt our access to data, but we have maintained continuous historical student data as far back as 1998 and anticipate no serious problems.

#### 6. What future trends are expected to impact Research?

At this time, California's budget crisis (and, subsequently, the District's budget crisis) is our primary concern. Our budget dictates how many researchers we will staff and to what extent we will be able to maintain our current level of service.

We must be constantly aware and sensitive to our changing demographics, community needs, and characteristics of the study body (i.e., the potential impact of the reversal of AB540 legislation) in order to keep current the members of the RSCCD Board of Trustees, Chancellors, College presidents, faculty, and staff. Information produced for this purpose may dictate to us the direction for further study necessary to promote the success of our students.

The increasing emphasis by State and Federal agencies towards accountability issues also influences the way we do business and shapes our agenda more and more each year.

RECOM  
MEND.

## Self-Study (continued)

### 7. Program Product

To evaluate our product, in Fall 2007 we distributed a brief questionnaire to all District and College faculty and staff via Santa Ana College's online assessment tool (accessed via the "InsideSAC.net" website. Classified, instructional, administrative, and supervisory staff members are represented in the findings, as well as all major district sites.

Overall, survey respondents rated Research Department services and staff very highly; customers were predominantly "very satisfied" or "satisfied."

- Roughly one-third to one-half of respondents, overall, reported that they have not used the services of the Research Department.
- Research Department staff members were given the highest ratings for being "helpful, knowledgeable, and responsive" and "demonstrating integrity and ethical behavior."
- Respondents expressed their lowest level of satisfaction with the Interactive Student Data System (ISDS), receiving the most "dissatisfied" and "very dissatisfied" ratings (17% across all employee groups)—predominantly by faculty respondents (22%).

Respondents cited several areas in which they would like to see more involvement by the Research Department:

- One-quarter of respondents, overall, reported that the Research Department does not have enough involvement in departmental program review; that view was predominantly expressed by administrators and managers (33%). Conversely, two faculty respondents reported that Research is "too involved" in program review activities of their departments.
- About one-third of respondents expressed that they would like more guidance and support from the Research Department with SLO development/assessment; faculty contributed largely to that assessment (36%).

Survey respondents indicated the types of reports most useful to them and the manner in which they prefer to receive data and information. In 2004, dissemination of the *Student Satisfaction Survey* reports (SAC and SCC) was followed up with a survey soliciting input about the usefulness, readability, and format of the report (reports of findings attached). Findings of that survey support the findings of the 2007 survey: all aspects of the report were rated "excellent" or "good" by respondents. Of particular interest to readers were student comments and, while many expressed interest in the availability of the report in electronic format, most reported that they find the "hard copy report" most useful.

- Across all employee groups, respondents indicated that descriptive and analytical reports are most useful to them.
- While classified staff members indicated that newsletters were most useful to them, both faculty and administrative/managerial groups rated newsletters lowest in both delivery format and usefulness.
- Administrative/managerial groups rated all types of data presentation and delivery format highly useful to them except newsletters.
- Overall, only 28% of respondents reported "frequent" or "very frequent" interaction with the Research Department; another 35% cited "occasional" interaction.

RECOM  
MEND.

## Recommendations

Input from these surveys, in tandem with direct feedback and requests, has indicated several issues important to faculty and staff at the District and its colleges:

- Respondents, especially faculty, expressed an eagerness to have direct access to data. While our Integrated Student Data System (ISDS) meets certain needs, it should be re-assessed with regards to format and flexibility.
- There seems to be general concern about how Research Department functions and service delivery will be affected by the implementation of Datatel. Research Department staff share those concerns and have worked closely with ITS in order to ensure a transition that is as smooth as possible. However, it must be acknowledged that the efficient and effective delivery of services to our student population is top priority in this transition period, and there will likely be a period of time during which current student records will not be immediately available to researchers for analysis and publication. Research Department staff has been assured that our needs will, ultimately, be addressed. We continue to monitor the progress of Datatel implementation and will address data availability issues as they arise.
- Faculty members require additional guidance and support for their student learning outcome assessment activities. While SLOs have been a top priority for the Research Department for several years, there may be disconnect between what researchers provide and what faculty requires/wants. Researchers will continue to address this issue and close the gap in expectations and service delivery.
- Dissemination of the products we make available continues to be an issue requiring our attention. It is as important as ever to make sure that faculty, staff, and members of the communities we serve are aware of the many services and publications available to them.

RECOM  
MEND.

# Rancho Santiago Community College District

## District Operations Planning Portfolio

2009-2011

### Resource Development

Department

*Update (June 2010)*



ORG. CHART

FUNCTIONS

GOALS

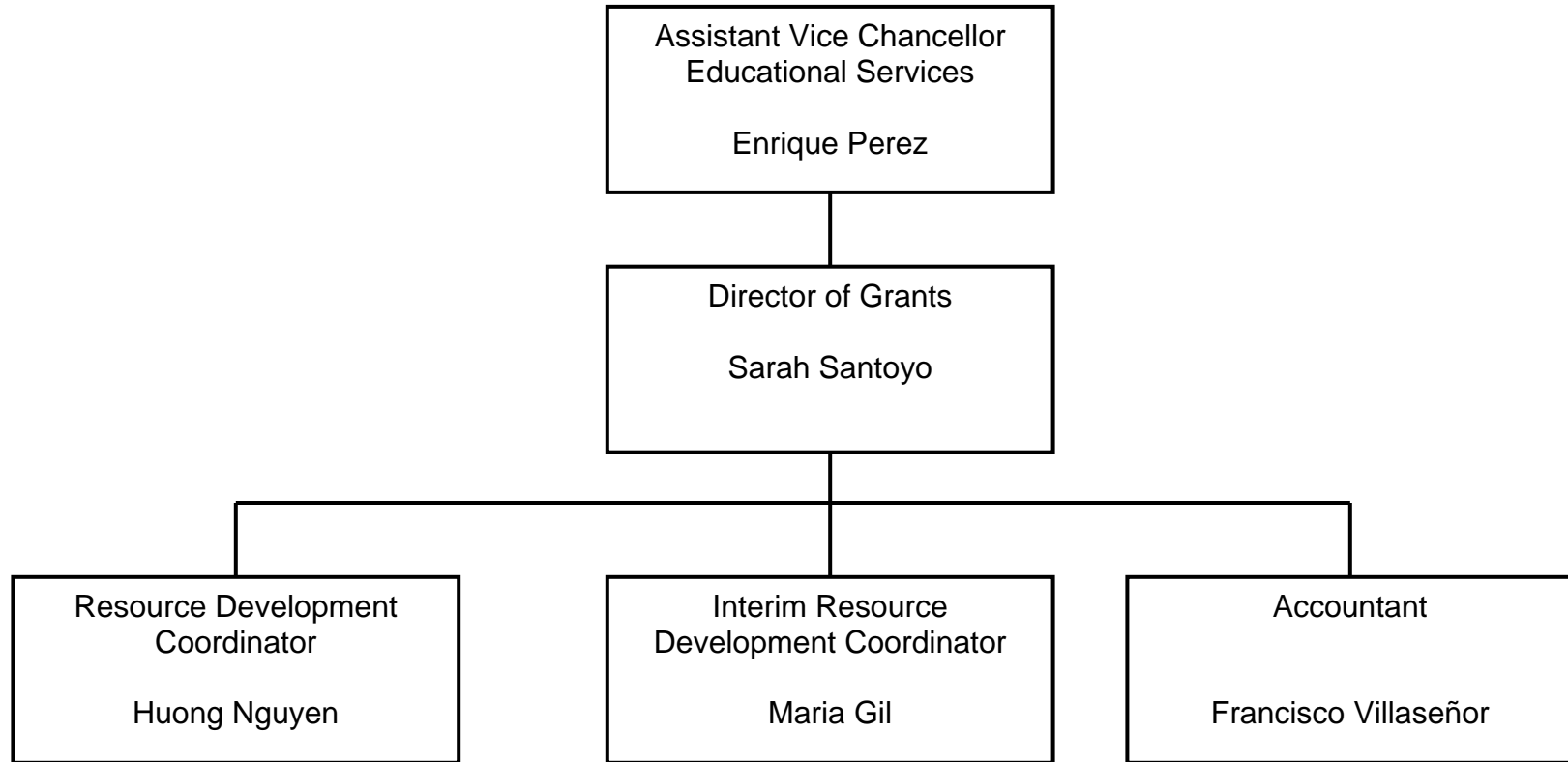
TECH  
PLAN

BUDGETS

SELF-  
STUDY

RECOM  
MEND.

# Organization Chart



ORG. CHART

# Functions

## Functions and services provided by Resource Development:

1. Identify and coordinate all district efforts to seek potential funding from state and federal agencies, private foundations and corporations that offer competitive and entitlement grants. This includes keeping in apprised of grant opportunities by attending bidder's conferences and functions.
2. Disseminate all information regarding grant opportunities to the appropriate college administrators, directors, and faculty; and keep informed of current and pending legislation or regulations related to grants and grant opportunities.
3. Coordinate and assist with the activities of those who are developing grant proposals including editing, writing, budgeting, reviewing, preparing, reproducing and mailing final versions of proposals. This also includes ensuring that all final proposals contain the required signatures, assurances, and certifications.
4. Create and maintain a Resource Development department file according to audit standards for each grant received, which includes a copy of the signed proposal, board approved budget, and any other forms or correspondence as appropriate.
5. Work closely with grant project directors and staff in order to ensure compliance with internal and external regulations, grant terms and objectives, as well as deadlines and reporting procedures.
6. Work closely with Accounting Department to continue proper district and general accepted accounting procedures related to grant compliance.
7. Conduct workshops for faculty and staff on proposal development and orientations on grant management.

FUNCTIONS

# Functions

## Customers and recipients of services:

Resource Development's role is to assist administrators and directors in identifying grant opportunities that align with the colleges' and district's priorities, plans, and development needs, and to provide comprehensive grant development assistance to produce competitive grant proposals. In this capacity, Resource Development engages in funding research; reviews and interprets grant specifications and application instructions; guides administrators in developing quality programs; assists with grant proposal development, including planning, advisement, research review, editing, proofreading, writing, and budget development; and prepares the final proposal and submits it to the funding agency.

After a grant is awarded, Resource Development assists project directors and staff with extensive budget and program planning to ensure that grant projects are implemented effectively, and in compliance with grant rules and regulations and consistent with district policies and procedures. Some of the services exemplifying this assistance are personnel cost projections, development of alternative budget and program scenarios to guide planning, creating sub-contract agreements for grant partners, determining to whether formal grant modification requests are required and advising directors on how to complete them, and contacting funding agency representatives to resolve budget and program questions.

Resource Development staff recognize that by providing comprehensive and timely assistance to grant directors and staff, they are serving the intended beneficiaries of grant activities: students and the community. It is important that grants are implemented effectively not only to remain in compliance, but to provide programs and services that are effective in benefiting students and our community.

FUNCTIONS

## Goals for years 2009-2011

GOAL	Responsible Person(s)	Completion Date	Resource Needs
Seek grant opportunities that align with the colleges' and district's priorities, needs, and planning.	Sarah Santoyo	Ongoing	Travel CRD Membership
Provide comprehensive assistance for proposal development to ensure that program designs are thoroughly well-planned and founded on research, expertise, and accurate data; in order to produce high-quality grant proposals that are competitive.	Sarah Santoyo Huong Nguyen Maria Gil	Ongoing	Grant developer/writer Computers Printers Software
Provide budget and program planning to assist project directors with grant management to ensure compliance with the rules and regulations and project objectives by: a) scheduling quarterly meetings with accounting and project directors and staff, and b) responding to requests for cost projections, assistance to resolve budget/program issues, advisement on formal request for budget/program revisions, etc.	Sarah Santoyo Huong Nguyen Maria Gil Francisco Villasenor	Ongoing	Additional staff Computers
Inform administrators and staff about Resource Development services, grant opportunities and awards, grant development, and grant management.	Sarah Santoyo, and staff as appropriate	Ongoing	Supplies for informational and training materials
Department provides high-quality services, maintains files according to audit standards, and develops policies and procedures to ensure effective grant development and grant management. (added 6/10)	Sarah Santoyo	Ongoing	Staff training Supplies

GOALS



## Progress Toward Goals (to be completed in June 2010)

2009-2011 Goals	Progress Rating 1 – 10 (10 = completed)	Comments
Seek grant opportunities	6	Most grant opportunities were identified through cyclical competitions we were already aware of, or through referral by an outside party. Some grant research was engaged in resulting in 2-4 opportunities reviewed.
Provide comprehensive assistance for proposal development ...	7	Sporadic support was available due to reduction from 3 grant writers/developers to 1, which led to some good grant opportunities not being pursued (worth about \$6 million). Some grants were developed with limited assistance from the department resulting in "robbing Peter to pay Paul" scenarios – i.e., faculty or administrators having to let other duties slide to "figure" out the grant stuff. Large, competitive projects, such as TRIO-SSS, Title V, Learn & Serve, received the most investment of staff time, but, with only 1 writer, it reduced the department's ability to pursue other opportunities.
Provide budget and program planning	6	There are over 200 grant budgets. Resource Development is the main source of consultation on compliance and program/budget planning assistance. Federal grants have complicated and extensive operational and audit requirements; failure to adhere to these requirements can lead to disallowance of costs and could jeopardize future federal grant opportunities. There are only two Coordinators (1 interim) and 1 Accountant (interim) to review/sign/submit all grant expenditure paperwork and to perform project/budget planning (cost projections, developing various budget scenarios, etc.). Due to limited staff, planning is performed only upon request, and little monitoring is performed (i.e., reviewing project budgets/reports to proactive identifying areas of concern and to develop action plans; meet with project directors each semester/quarter.) Limited monitoring often leads to extensive use of budget changes, status changes, and transfer of expenditure forms, which impacts the workload of other departments, HR, Accounting, Fiscal, Accounts Payable and Purchasing.
Dissemination/Training	5	Resource Development work is prioritized as follows: prepare grant applications; review/sign/submit paperwork for grant expenditures; budget/program planning for new projects, and for year-end and new fiscal year; reports and audits. This leaves little time for research & dissemination of grant opportunities, or training grant directors & staff – resulting in missed opportunities & possible compliance/budget issues.
Department standards/policies	5	Limited staffing allows little time to focus on improving department standards and practices. This is significant, because Resource Development is required to maintain files to audit standards and to have processes that strength compliance. Further, the Director serves as the writer & some coordination duties, impacting administrative role.

**GOALS**

## Department Technology Plan

Include software, hardware, and training needs.

- 3-year replacement of computers (laptops and desktops)
- As appropriate, grant development and management training opportunities
- Datatel training, as required.

TECH  
PLAN

# Budget and Expenditures

Object Code	2009-20010		2010-2011		2011-2012	
	Budgeted	Expended	Budgeted	Expended	Budgeted	Expended
2110 – Classified Management	85,000	83,755	85308			
2130 – Classified Employees	143,746	110,915	113,754			
3000 - Benefits	65,321	70,366	84,930			
5210 - Conferences	410	284	410			
4610 - Supplies	439	400	439			
5610 – Lease Agreement	2,459	2,260	2459			
5845 – Excess Copies/Usage	774	587	774			
<b>TOTAL</b>	298,149	268,030	288,074			

BUDGETS

# Self-Study

## Self-study standard questions:

1. How do persons served by the program evaluate its adequacy, efficiency, and effectiveness?

In the past, the Resource Development Department evaluated its services every four years through the Program Review process. In 2007, a survey was sent to all district employees and interviews were conducted with administrators and staff. There were 242 respondents to the survey. In brief, 85% of respondents were satisfied or very satisfied with how Resource Development facilitates the grant process from conceptualization to final submission, and 84% were satisfied or very satisfied with how Resource Development provides technical assistance to solve budget problems. Interviews with administrators, revealed a consensus that Resource Development staff are an invaluable asset in grants development and management, and a recognition that grants are critical means to achieving the colleges' mission and to foster a culture of accountability and innovation.

Areas that showed significant dissatisfaction were as follows: 23% of faculty were dissatisfied with dissemination of information about funding opportunities; 11% of all groups were dissatisfied with how Resource Development provides data and conducts literature searches for proposal development; 17% of classified staff were dissatisfied with how the department facilitates the grant process from conceptualization to final submission; and 16% of classified respondents were dissatisfied with the new grant startup meetings. The areas showing dissatisfaction share a common thread of insufficient communication, which has been useful in guiding goal development for 2009/2011.

Data and responses from the interviews were used to develop the Program Review Report, which has been a useful tool for completing this portfolio and developing departmental goals.

2. Are the services comparable in quality and scope to those offered by similar programs at other colleges?

Based on general knowledge of how other college resource development programs operate, the RSCCD Resource Development Department appears to compare favorably to most other similar programs. Most community colleges do not provide the scope of services offered by RSCCD Resource Development, nor do they obtain as many grants. In conversation with colleagues at Council for Resource Development conferences, it is clear that most colleges have a grant writer, perhaps two, and most do not become involved with grants management.

3. What efforts does the program make to continually upgrade its services?

SELF-  
STUDY

As the goals of the Resource Development Department are to 1) produce competitive grant proposals that are funded and 2) assist directors and staff with grant management to ensure that projects are in compliance with regulations and project objectives, the department is in constant self-assessment based on the staff's ability to achieve these two goals. Any process, or lack thereof, that is insufficient in achieving the department's main goals is readily apparent through not receiving a grant award and through problems in budget and reporting. Reflection and adjustment are engaged in consistently.

Additionally, changes in district procedures and systems that will impact grants budget and projects (e.g., Datatel replacing IFAS, switch to electronic status change forms), initiate a discussion among staff members as how to educate grant directors and staff, and to review existing processes and procedures to determine if they need to be modified.

4. How much progress has been made towards program goals?

Consistent with the "Progress Towards Goals" chart listed in the Goals Section, this will be completed in June 2010.

5. What are the strengths and weaknesses of the program?

Strengths

Talented, knowledgeable, and hardworking staff

High success rate

Service-oriented

Strong relationships with colleges

Strong relationships with district staff and administrators

Weaknesses

Grant monitoring is insufficient (reduced staff)

Effective and sufficient communication efforts

Except on a limited basis, staff are not included in planning and policy discussions at the college and district, which would provide useful information to guide grant seeking.

# Self-Study

## Self-study standard questions:

6. How successful has the department been in obtaining grants?

That attached report (Exhibit A) displays the grant activities of the past several years.

7. What are future trends expected to impact resource development?

State budget reductions will significantly impact the Resource Development Department. Budget development is a complicated process because it directly ties to program services, grant terms and regulations, and district policies in HR, Purchasing, and Fiscal Services. If our state grants/entitlement budgets are cut, Resource Development staff will be depended upon to assist project directors to adjust their budgets and programs accordingly, which entails extensive cost projections, development of alternative budget and program scenarios, and extensive planning discussions. Further, the state budget crisis has led to staff reductions. As project directors lose staff, they will likely seek assistance from Resource Development staff for advisement and assistance with completing budget change and status change forms, processing POs, accessing Datatel reports, etc. Since the department has been reduced by half (we had six staff members in 2006, and now we have three), the increase in workload could negatively impact the department's ability to provide consistent and timely grants management assistance.

Additionally, electronic submission of status change forms has increased the amount of time Resource Development staff spend in reviewing, processing, and filing these forms. To view a status change form, we have to click on the attachment sent in an email from HR, then browse for and open the file we need to view the attachment, then save the file to a folder, sign the form (if the form requires changes, an email discussion series results), then submit it to HR (unless there is a match account, in which case it is sent to Gina, who reviews, saves, signs, and sends it back to Resource Development). This series of activities occurs for each status change, which can take a significant amount of time during peak activity when 20+ status changes are sent for processing.

SELF-  
STUDY

## Recommendations

1. Hiring another writer would increase the Resource Development's capacity to research and apply for more grants that would bring funding to support our colleges and district. Hiring an additional Resource Development Coordinator and Accountant would enable Resource Development to increase its monitoring and budget/program planning assistance to ensure that projects stay in compliance; to ensure that funds are spent and projects implemented optimally for the best impact on the colleges and district; to minimize the impact on district departments to "clean up" projects at the end of the year.
2. Resource Development will need to become thoroughly proficient in knowing and interpreting Federal regulations in order to develop processes and procedures that support compliance; to train grant project directors and staff, and appropriate District directors and staff; and to maintain Resource Development's grant files to audit standards.
3. The colleges and district should regularly inform Resource Development about their planning goals, priorities, and needs so that Resource Development can be more effective in finding and disseminating grant opportunities, and in developing grant projects the augment and align with the colleges and district's needs and interests.

RECOM  
MEND.

# Rancho Santiago Community College District

## District Operations Planning Portfolio

2009-2011

### Small Business Development Center

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Department

*Update (June 2010)*



ORG. CHART

FUNCTIONS

GOALS

TECH  
PLAN

BUDGETS

SELF-  
STUDY

RECOM  
MEND.





## Portfolios for Planning

The purpose of the RSCCD portfolios is to provide an instrument for department planning, evaluation, and resource prioritization that is streamlined and that coordinates those related activities.

In good practice, planning processes are cyclic, and priorities for resource allocation result from the identification of goals. That is, evaluation, or program review, conclusions are used to identify future goals; those goals are used for budgeting. After plan implementation, further evaluation results in refined, revised plans, and so forth.

The portfolio process is designed to enhance the cohesion of planning-related activities as well as to allow for maximum customization of planning and evaluation activities for each unique support services department.

The portfolios should be maintained on an ongoing basis, with goals and budgets being updated each year. In this way, the portfolio can be used as a source document for resource allocation requests when needed.

ORG. CHART

FUNCTIONS

GOALS

TECH  
PLAN

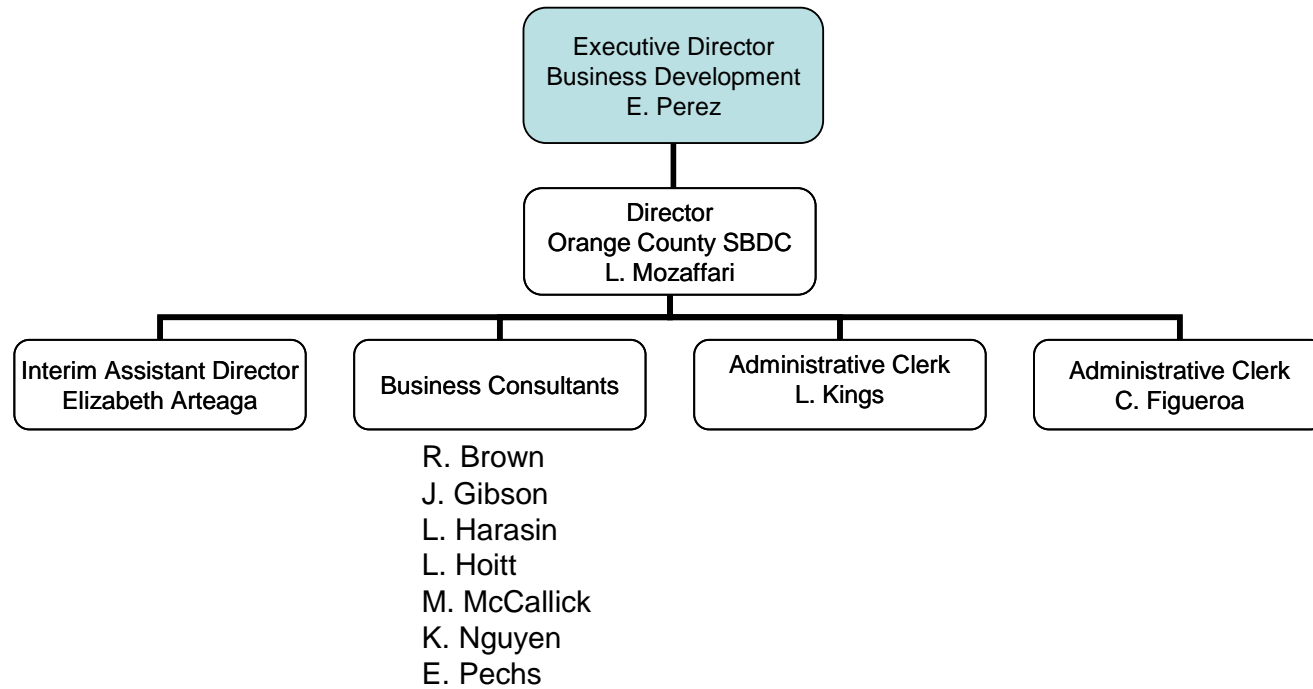
BUDGETS

SELF-  
STUDY

RECOM  
MEND.

# Organization Chart

## Rancho Santiago Community College District



ORG. CHART

# Functions

## Functions and services provided by the department:

The SBDC provides: assessment, one-on-one consulting, business and managerial training, access to capital facilitation, outreach and referral services to Orange County's small business community. These services are provided in English, Spanish and Vietnamese. A secondary service of the SBDC is to provide start-up assistance to entrepreneurs who want to start or purchase a business. Summary of services offered by OCSBDC throughout Orange County include:

1. **BUSINESS PLANNING** - includes research, preparation, development, and review
2. **MARKETING** - business development, target market identification, strategy development and implementation.
3. **FINANCIAL** - financial statement development, analysis, strategy, capital needs, cash flow management.
4. **ACCESS TO CAPITAL** - determination of financing needs, preparation of financial documentation, review of final loan documentation, and referral to potential lending institutions
5. **PROCUREMENT** - Government contracting, proposal preparation, negotiation, contract management
6. **TECHNOLOGY** - Web-sites, application software, databases, systems integration, infrastructure (hardware and network), business process improvement
7. **GOING GREEN (ECOPRENEURSHIP)** – feasibility analysis, planning, costing, pricing, sourcing, certification
8. **YOUTH ENTREPRENEURSHIP** –Assessment, training, consulting, business plan competition

SBDC Service locations include: **Little Saigon, Santa Ana, Mission Viejo, and Huntington Beach**

**FUNCTIONS**

# Functions

## Customers and recipients of services:

Primary customers: Orange County's small business Community including small businesses, associations, and chambers.

Secondary customer: Entrepreneurs or would be entrepreneurs interested in opening or purchasing a small business

FUNCTIONS

# Goals

1. Annual goals (including staff development goals) – created at beginning of each school year
2. Progress towards goals – created at end of each school year
3. Other accomplishments – created at end of each school year

GOALS

## Goals for years 2009-2011

GOAL	Responsible Person(s)	Completion Date	Resource Needs
Extended Engagement Clients (5+ hrs contact time)	Director/Business Consultants	On-going	Program funds and district support
Long Term clients (5+ hrs contact and prep time)	Director/Business Consultants	On-going	Program funds and district support
Total trainees	Director/Assistant Director	On-going	Program funds and district support
Business start-ups	Director/Business Consultants	On-going	Program funds and district support
Capital infusion	Director/Business Consultants	On-going	Program funds and district support
Staff Development	All	On-going	Program funds and district support

GOALS

## Progress Toward Goals (June 2010)

2009-2011 Goals	Progress Rating 1 – 10 (10 = completed)	Comments
Extended Engagement Clients (5+ hrs contact time)	5	Actual = 314, at goal
Long Term clients (5+ hrs contact and prep time)	9	Actual = 422, ahead of goal = 400
total trainees	8	Actual = 2440, trainees ahead of goal = 1500
Business start-ups	6	Actual = 19 businesses created ahead of goal = 18)
Capital infusion	4	Actual = \$4,811,620 below goal due to lack of credit available to small business (goal \$5M)
Staff development	5	At goal with 11 monthly & 3 quarterly in service training events

GOALS

# Department Technology Plan

Include software, hardware, and training needs.



TECH  
PLAN





# Self-Study

## Self-study standard questions:

1. How do persons served by the program evaluate its adequacy, efficiency, and effectiveness?

The SBDC utilizes a formal and vigorous evaluation method to determine the effectiveness of all technical assistance programs. Every client is logged into our web-based database (WebCATS) which is accessible from any location with an Internet connection. Clients are assisted through a series of sessions. Each technical assistance session is documented by the consultant into WebCATS. All micro- loan applications are tracked in WebCATS as well as all economic impact milestones such as business starts, jobs created, jobs retained, sales increase, capital injection (loans and other). As part of scheduling the next session, the client is asked if everything was to their satisfaction. Any negative responses are shared with the Director so that corrective action can be taken.

At each training and peer-group mentoring event, evaluation forms are provided, collected, tabulated and utilized in gauging client satisfaction with content, speaker, topic, registration process and location of the event. Input is used to improve and expand services.

On a quarterly basis, a survey is sent to SBDC clients with a stamped envelope addressed to California State University Fullerton who is responsible for tabulating the survey results and communicating them with SBDC management. Surveys are in English and Spanish.

On an annual basis, the Association of Small Business Development Centers conducts a study of the effectiveness of our technical assistance and training programs through a national survey. Results are again shared with the Director so that delivery can be improved.

The ultimate gauge of our effectiveness is the economic impact results. For example during calendar year 2008, our clients reported 307 jobs created and retained as a result of our assistance and \$20,011,700 of direct economic impact.

2. Are the services comparable in quality and scope to those offered by similar programs at other colleges?

The SBDC at RSCCD has a reputation of being among the best SBDC in the state of California. In June 2009, we were recognized by our federal funding partner, the US Small Business Administration as an SBDC Center of Excellence. Also, the California Community Colleges Chancellor's Office (state-wide system office) recognizes RSCCD's SBDC as a strong performer among all college-hosted and non-college hosted SBDCs in the State.

**SELF-  
STUDY**

3. What efforts does the program make to continually upgrade its services?

The SBDC takes input from clients, an active advisory board, strong and supportive community partners and diversified funding partners (state, federal, local, and private) on how to improve its services. For example, it has added the Go Green (ECOPRENEURSHIP), and expanded its procurement services due to the trends and in response to regional needs.

4. How much progress has been made towards program goals?

The SBDC continuously meets and exceeds stretch goals set for it by the regional, state-wide and national program administrators.

5. What are the strengths and weaknesses of the program?

Strengths

Knowledgeable and dedicated staff, committed and supportive host (RSCCD) and funding partners, strong base of support within the community, engaged and active advisory board and community partners and an entrepreneurial business community.

Weaknesses

In-sufficient resources to effectively serve Orange County's small business community.

6. How successful has the department been in obtaining grants?

SBDC has been extremely successful in obtaining grant funds. Examples are the Wells Fargo foundation funding for our Vietnamese American Technical Assistance Program (\$400,000), Caltrans/CCCCO funding for the California Construction Contracting Program (\$150,000), and CCCCCO funding for Youth Entrepreneurship (\$160,000).

7. What are future trends expected to impact resource development?

As the economy comes out of the recession, and state and local grants become more available, there will be increased opportunities to garner support for our program among funders which would impact. Also, the State of California's Employment Training Panel's Entrepreneurial Training Program funding will become a good source for the more in-depth training programs for business owners.

SELF-  
STUDY

# Recommendations

RECOM  
MEND.

# Rancho Santiago Community College District

## District Operations Planning Portfolio

2009-2011

Workplace Learning Resource Center (WpLRC)

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Department

*Update (June 2010)*



ORG. CHART

FUNCTIONS

GOALS

TECH  
PLAN

BUDGETS

SELF-  
STUDY

RECOM  
MEND.



## Portfolios for Planning

The purpose of the RSCCD portfolios is to provide an instrument for department planning, evaluation, and resource prioritization that is streamlined and that coordinates those related activities.

In good practice, planning processes are cyclic, and priorities for resource allocation result from the identification of goals. That is, evaluation, or program review, conclusions are used to identify future goals; those goals are used for budgeting. After plan implementation, further evaluation results in refined, revised plans, and so forth.

The portfolio process is designed to enhance the cohesion of planning-related activities as well as to allow for maximum customization of planning and evaluation activities for each unique support services department.

The portfolios should be maintained on an ongoing basis, with goals and budgets being updated each year. In this way, the portfolio can be used as a source document for resource allocation requests when needed.

ORG. CHART

FUNCTIONS

GOALS

TECH  
PLAN

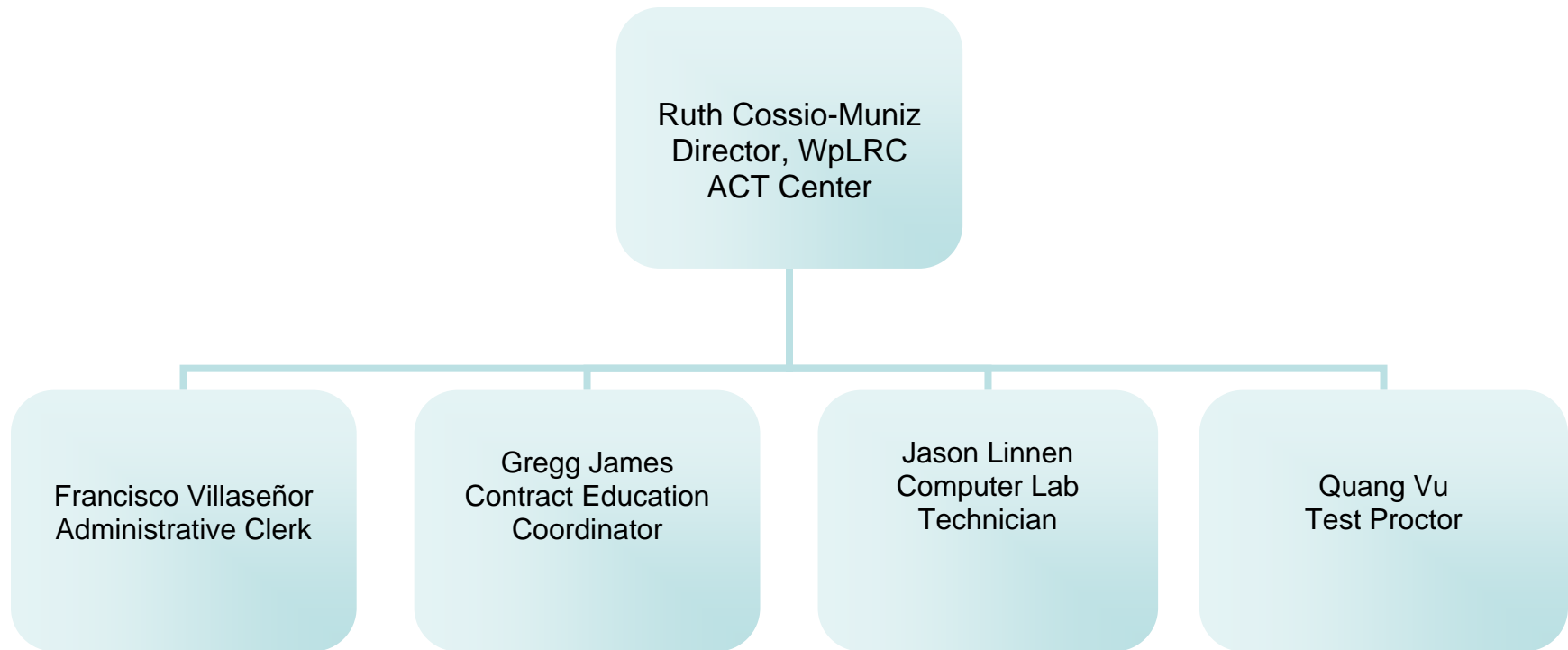
BUDGETS

SELF-  
STUDY

RECOM  
MEND.

# Organization Chart

## Rancho Santiago Community College District Educational Services – WpLRC & ACT Center



ORG. CHART

# Functions

## Functions and services provided by the department:

1. Develop partnerships on a regional level to support local community college responsiveness to emerging industry and workforce needs as well as developing strategies to address workforce issues.
2. Increase employer awareness of the business and industry programs and services available through promotion of the Community College Economic and Workforce Development brand as well as WpLRC.
3. Provide basic technical assistance to colleges in the region, endeavoring to maintain a self supporting contract education program that derives its primary revenue through fees paid by employers who contract for customized training programs and services.
4. Act as a resource for and provide technical assistance and staff development to colleges that build the capacity to develop and deliver customized training and contract education to employers through community colleges in the region.
5. Work with industry to determine targeted training needs as well as provide customized training using a contract education vehicle.

FUNCTIONS



# Functions

## Customers and recipients of services:

1. Partnerships have been formed with the Santa Ana One Stop, Santa Ana Chamber, Black Chamber, Hispanic Chamber, North Orange County Community College District Special Programs, Coastline Community College, and Small Business Development Center, United Way, California Manufacturing Technology Consultants (CMTC) as well as numerous others.
2. Direct services have been provided to various business owners and organizations in the area, including
  - Anaheim Marriott
  - Bio-Safe America Corporation
  - Blockbuster, Inc.
  - Citizens Business Bank
  - Farmers & Merchants Bank
  - First American
  - Fountain Valley Regional Hospital
  - Goodwill
  - Hilton
  - OCTA
  - Orange County Board of Supervisors
  - Orange County Business Council
  - Orange County Sheriff's Dept.
  - Orange County Veterans Job Service
  - Ricoh Electronics
  - Southern California Edison
  - Staffing Solutions
  - Think Together
  - Vanguard University
  - Waste Management
  - Working Wardrobes

FUNCTIONS

## Goals

1. Annual goals (including staff development goals) – created at beginning of each school year
2. Progress towards goals – created at end of each school year
3. Other accomplishments – created at end of each school year

## Goals for years 2009-2011

GOAL	Responsible Person(s)	Completion Date	Resource Needs
1. COLLABORATION - Work with business, labor and professional trade organizations, and the colleges within the geographic region to explore and develop new alternatives for assisting incumbent workers to increase competency, and identify life-long career paths to economic self-sufficiency.	Director Contract Education Coordinator WpLRC Staff	July 09 - June 10	CCC Confer
2. RESEARCH - Work with industry to determine targeted training needs.	Director Researcher	July 09 - June 10	Center of Excellence
3. CERTIFICATION - Develop industry certification programs.	Director	July 09 - June 10	TBD
4. TRAINING - In collaboration with the community colleges in our Region, increase the delivery of customer-driven education, training and related services to businesses and employers using customizable/performance improvement or similar training models in the areas of workplace learning for basic and upgrade skills and the challenges in today's workforce.	Director Expert Trainer WpLRC Staff	July 09 - June 10	Constant Contact
5. RESOURCE - Be a resource for and provide technical assistance and staff development to colleges that build the capacity to develop and deliver customized training and contract education to employers in the Region.	Director	July 09 - June 10	TBD

TECH  
PLAN

<p>6. TECHNICAL ASSISTANCE - Utilizing the regional network of community college service centers, serve as a demonstration site and provide technical assistance and faculty in-service training on an annual basis to develop the capacity of the participating community colleges to effectively deliver workplace learning services.</p>	<p>Director</p>	<p>July 09 - June 10</p>	<p>Computer Labs Technical staff/software</p>
<p>7. FLEXIBLE SERVICE - Promote and maintain program flexibility in the Center's services as they address differing regional needs in underserved geographic areas of economic distress.</p>	<p>Director Contract Ed. Coordinator</p>	<p>July 09 - June 10</p>	<p>TBD</p>
<p>8. MARKETING - Participate and continue toward statewide EWD branding and initiative-level marketing campaigns.</p>	<p>Director Contract Education Coordinator WpLRC Staff</p>	<p>July 09 - June 10</p>	<p>TBD</p>
<p>9. STATE TRACKING &amp; REPORTING - Track and report all external investments that the project attracts, including credit and non-credit FTES invested by participating districts, the Employment Training Panel contracts and other income. Track contract education revenue separately from the host district/college education revenue.</p>	<p>Director Contract Education Coordinator WpLRC Staff</p>	<p>July 09 - June 10</p>	<p>Datatel MS Office TBD</p>
<p>10. INTERNAL TRACKING - Track courses and programs developed and/or offered through the project.</p>	<p>Director WpLRC Staff</p>	<p>July 09 - June 10</p>	<p>TBD</p>

TECH  
PLAN

## Progress Toward Goals (June 2010)

2009-2011 Goals	Progress Rating 1 – 10 (10 = completed)	Comments
1. COLLABORATION	10	WpLRC continued existing relationships and created new partnerships with individuals and various organizations.
2. RESEARCH	7	WpLRC enjoyed learning from the environmental scans produced by the Centers of Excellence, but there were no new studies conducted in direct relation to workforce development.
3. CERTIFICATION	10	Over 1,000 certifications awarded out of the ACT Center
4. TRAINING	7	Workshops were not as well attended in the down economy
5. RESOURCE	9	Made in-roads with the colleges to utilize our services for increase of visibility and FTES to their programs
6. TECHNICAL ASSISTANCE	10	Continued to provide technical assistance to nearly 250 displaced workers referred to our Center from the State of California EDD
7. FLEXIBLE SERVICE	10	WpLRC was able to customize new trainings for 'repeat' clients
8. MARKETING	10	Successfully created a new public website, electronic newsletter, as well as social media accounts to communicate about our program and services
9. STATE TRACKING & REPORTING	10	Submitted all quarterly reports on a timely basis to the State Chancellor's Office
10. INTERNAL TRACKING	10	Developed a client info database to track use of services and determine ROI

**TECH  
PLAN**

# Department Technology Plan

Include software, hardware, and training needs.

- Receive additional training in the new Datatel system
- Become more familiar/trained in online conferencing such as with CCC Confer, WebEx, or GoTo Meeting.
  - Purchase software plans
- Brand WpLRC through social media: Facebook, LinkedIn and Blogs
  - Purchase memberships with upgrades for business marketing
- Create electronic newsletter to communicate with clients
  - Purchase Constant Contact software
- Assess and improve effectiveness of training
  - Subscribe to Survey Monkey

TECH  
PLAN

# Budget and Expenditures

Object Code	2009-20010		2010-2011		2011-2012	
	Budgeted	Expended	Budgeted	Expended	Budgeted	Expended
<b>TOTAL</b>						

BUDGETS

## Self-Study

### Self-study standard questions:

1. How do persons served by the program evaluate its adequacy, efficiency, and effectiveness?

The Workplace Learning Resource Center (WpLRC) has had outstanding reviews from clients served. The programs are timely and address issues that are current within the workforce. We have a host of workshops that address everything from State-mandated training, such as Sexual Harassment Prevention, to ArcGIS Certification, which enables businesses to command use of the geographic information system. We have a couple Supervisory Skills and Leadership training workshops, Effective Time Management training, PC Protection Training, and Basic Business Writing

2. Are the services comparable in quality and scope to those offered by similar programs at other colleges?

Yes because we are able to customize our offerings to meet the needs of those we serve.

3. What efforts does the program make to continually upgrade its services?

WpLRC looks for business and industry trends and offers timely programs such as our Career Transition and Outplacement Service. In addition, the Center receives calls requesting the next level of training to an existing course, such as the Supervisory offerings, and makes them available.

4. How much progress has been made towards program goals?

Marketing and networking activities have occurred at all levels and have contributed to the WpLRC being viewed as a strong training and consultant resource by the Region. Its prominence has increased over the years due to program's visibility, partnerships and collaborations.

RECOM  
MEND.



## Self-Study cont'd

5. What are the strengths and weaknesses of the program?

### Strengths

- Flexibility
- Strong partnerships
- Quick response time
- Creativity

Across the years, the Center and its staff have been viewed as a credible, flexible and innovative provider, stakeholder and partner in the economic vitality of Orange County.

### Weaknesses

- Limited staff

Within the community college system in Orange County there are sixteen (16) distinct economic development programs, ten (10) separate colleges and four (4) community college districts as well as two (2) Workplace Learning Resource Centers, with a third being located in Long Beach, and a number of other economic development programs and initiatives. This unintentionally creates *challenges* for effective marketing and delivery of services. Ideally, an expanded staff to conduct outreach and deliver the training would help secure an expanded client base.

6. How successful has the department been in obtaining grants?

The Workplace Learning Resource Center and California Manufacturing Technology Consulting (CMTC) have partnered together to provide state-funded workforce training solutions in Orange County. Training is provided by WpLRC and funded by the California Employment Training Panel (ETP) upon meeting qualifying criteria.

7. What are future trends expected to impact resource development?

WpLRC will look for opportunities to work with the Workforce Investment Boards to take advantage of stimulus dollars as new developments and unprecedented levels of funding continue to emerge through the American Recovery & Reinvestment Act.

RECOM  
MEND.

## Recommendations

- 1) Work closer with our partners and leverage all resources to apply for Grant monies.
- 2) Secure funding to continue offering WorkKeys assessments, and have our CTE programs utilize WorkKeys as part of the training.
- 3) Get an AA Degree or Certification program at the Colleges to incorporate use of the National Career Readiness Certificate into their curriculum.
- 4) Promote and utilize the Spanish version of the WorkKeys to meet the needs of the large Hispanic population.
- 5) Communicate more consistently and directly with our clients through an electronic newsletter.
- 6) Get connected to the College Career Centers and job developers to expand our database.
- 7) Look for groups such as Veterans, Foster Care, and others that have funding set aside to help those who are looking for a career and/or job training.
- 8) Work closer with EDD and the One-Stop Centers to leverage the services that we already offer to those they serve.
- 9) Have a calendar of events that will highlight dates and time of workshops and training opportunities for all of the economic development programs and our key partners.
- 10) Have all of our partners offer links on their web site to our services.
- 11) Provide Career Transition services to those within the District who have been displaced due to budget issues.
- 12) Become more familiar with the changes in the new GI Bill to be able to better serve the returning Vets whose unemployment rates are now above 20%.

RECOM  
MEND.

# Rancho Santiago Community College District

## District Operations Planning Portfolio

2010-2011

Public Affairs/Governmental Relations  
Department



*Update (June 2010)*

ORG. CHART

FUNCTIONS

GOALS

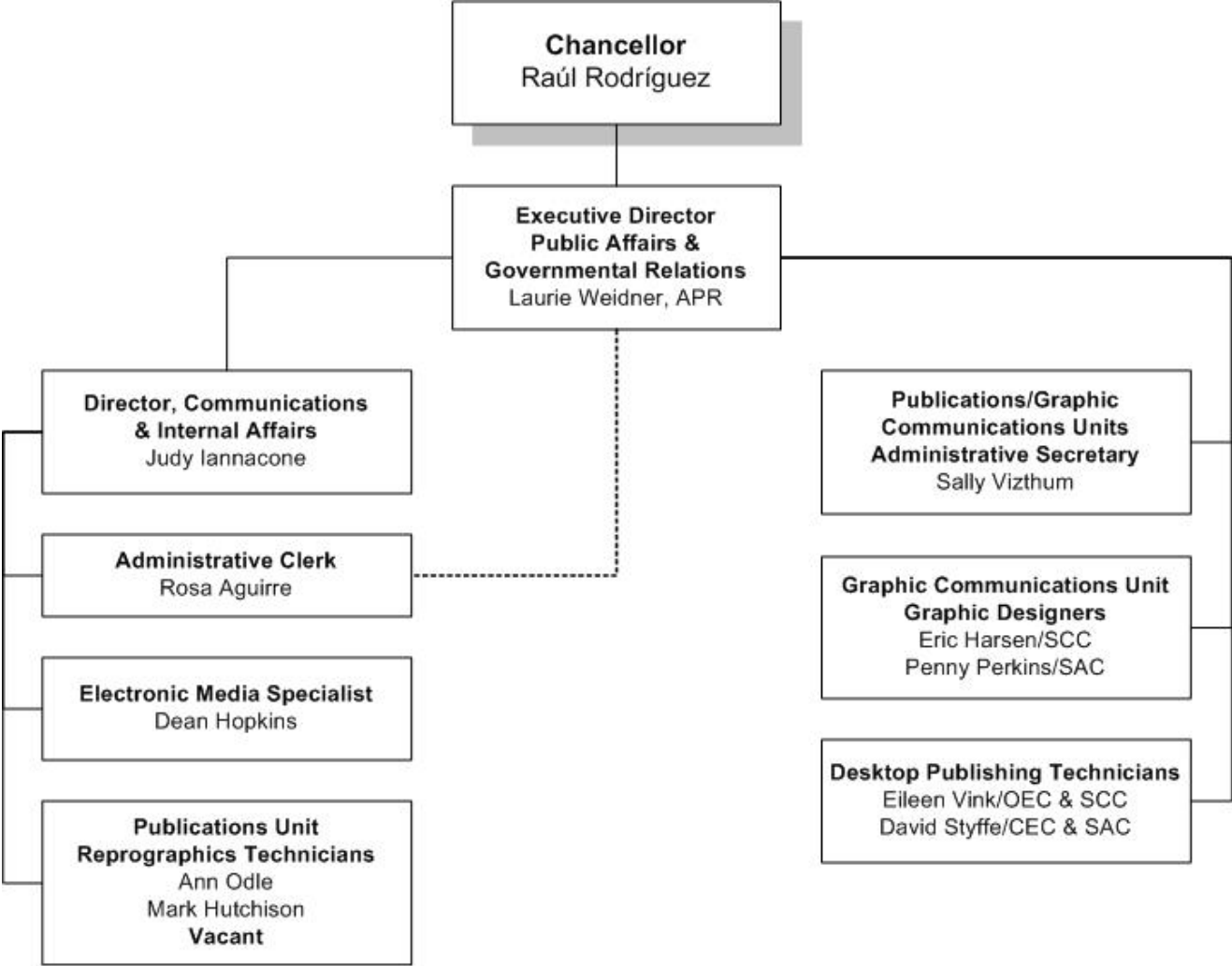
TECH  
PLAN

BUDGETS

SELF-  
STUDY

RECOM  
MEND.

**DRAFT – pending approval**  
**Rancho Santiago Community College District**  
**Public Affairs & Governmental Relations**  
**June 21, 2010**



ORG. CHART

# Functions

The Public Affairs/Governmental Relations department is responsible for communicating and promoting the good news about the college district and colleges to students, the community, opinion leaders and the mass media through strategic communications efforts. In addition, the department monitors issues and works with district and campus leadership to communicate accurate, timely information and unified messages to support the college and district office brands.

## ***Public Affairs/Governmental Relations***

- Develop and lead advocacy efforts with all levels of government to sustain and advance the mission of the college district.
- Sustain favorable working relationships with local, county, state and federal elected officials and their staff.
- Support RCCD and campus grant applications by soliciting letters of support from all levels of government.

## ***Public Relations***

- Provide public relations services to the colleges and district office programs and services.
- Organize, lead and implement public information efforts.
- Monitor issues in the media and through online sources, which have relevancy to the colleges and district operations center.

## ***Employee Communications***

- Develop and implement comprehensive employee communications efforts aimed at establishing open, two-way lines of communication with all constituency groups.

## ***Media Relations***

- Manage media relations to place positive stories in print, broadcast, ethnic, specialized, trade and electronic media about the college district, campuses, students, programs, and services.
- Neutralize negative publicity, where possible.
- Prepare and train media spokespersons to address print, broadcast and online media. Staff media interviews.
- Where appropriate, ghost-write by-lined articles for the chancellor, Board president and college presidents in consumer, trade and online media.

## ***Crisis Communications***

- Develop the district and campus' crisis communications plans.
- Fulfill the PIO role as part of the command staff in the ICS structure for the district office, and offer support to the campuses as needed.

FUNCTIONS

### ***Community Relations***

- Represent the Chancellor and Board, when appropriate and when designated, to attend or present information to key constituents, elected officials, and other stakeholders.
- Support the chancellor and Board president with strategic relationship management efforts.
- Sustain the district's Community Advisors database.
- Develop and coordinate comprehensive outreach efforts to the community regarding Measure E and other district-wide priorities and issues.

### ***Marketing/Advertising/Branding***

- Develop and lead marketing communications efforts to sustain enrollment at campus and Continuing Education locations.
- Lead and sustain social media presence for colleges and district.
- Develop and lead marketing communications efforts to build and sustain the visibility of RSCCD economic development programs and endeavors.
- Support brand identities, the communication of unified messages and graphic standards of excellence.

### ***Online Communication***

- Maintain the district's main webpage with timely news items.
- Support colleges and district programs by developing customized websites in concert with Graphic Communications and other department professional staff.
- Train campus and district office staff regarding effective online writing and website features.
- Build and sustain the colleges' social media sites.

### ***Graphic Communications***

- Design marketing and other communications tools for the campuses and district operations center to support enrollment growth and brand identities.
- Develop logos and corporate identity packages for new college and district programs and services for students and the community.
- Support brand identities, the communication of unified messages and graphic standards of excellence.

### ***Reprographics Services***

- Produce quality black-and-white copies for faculty at the campuses and Continuing Education centers.
- Produce full color photocopies of marketing materials and other tools for students and the community.

**FUNCTIONS**

## **Mission**

The department is responsible for ensuring that the college district and colleges project a professional public image through the use of consistent visual elements and messages that support organizational goals.

## **Vision Statement**

The Public Affairs/Governmental Relations department fosters respect, open communication, pride and a “can do” attitude, while striving to achieve our personal and professional best. As leaders in our field, we take a proactive approach in providing superb service; efficient, innovative strategies; and communications tools to support the success of those we serve. We pledge to increase the vitality of our campuses, the college district, and the community by efficiently using resources and incorporating new and emerging technologies.

## **Core Values**

Professionalism  
Teamwork  
Respect  
Appreciation  
Integrity  
Innovation  
Creativity

**FUNCTIONS**

## Goals for years 2010-2011

GOAL	Responsible Person(s)	Completion Date	Resource Needs
<p><b>Internal</b> Support mission-focused communication with all employee groups to sustain a climate of open communication.</p>	Laurie Weidner Judy Iannaccone	Year-long	Contracted writing support or the addition of a Communications Specialist within the PAGR department. Department is only currently staffed by one FT PR professional. The other manager is devoting 60% of her available time managing the Reprographics unit.
<p><b>External</b> Advocate the district's legislative priorities to elected officials at all levels of government.</p>	Laurie Weidner, chancellor and Board of Trustees	Year-long – focused around Legislative Calendar and key advocacy trips to Sacramento and D.C.	Add clerical staff during peak times throughout the year. Restore travel budget to allow for support for the Board and appropriate follow up from the legislative meetings. Hire a Publications Manager to allow the other manager to resume duties. This will allow more time for Public Affairs priorities.
Enhance public perception of the colleges and district through proactive public relations strategies.	Laurie Weidner, Judy Iannaccone & Dean Hopkins	Year-long	Restore budget for advertising, marketing, printing, contracted services for writers and designers, and an investment in appropriate equipment including a camera and video camera for inclusion on websites and social media sites. Rebuild the department to allow for a comprehensive and robust external communications program. With the department sustaining deep cuts, most tactics have been eliminated. These communications are needed to sustain brand awareness and identity.
Build and sustain strategic relationships to advance organizational goals using traditional and online communications strategies.	Laurie Weidner, Chancellor, college presidents & Board president	Year-long	Investment in technology and clerical support to aid relationship management and “friend” cultivation.
Communicate the fiscal prudence and success of the Measure E-funded capital improvement program.	Laurie Weidner & Dean Hopkins	Year-long	Restore budget to allow for advertising and promotion. Measure E has no visibility.

TECH  
PLAN



Reinforce the college and district brands, underscoring program excellence, value, caring cultures, and high student success rates.	Entire team	Year-long	Restore the department's budget. Graphic Communications has been cut by 91%. Publications by 25% and the Public Affairs/Governmental Affairs budget by more than 47%. Restore staff. Staff has been reduced by nearly 60%. There is little that can be done with one FT practitioner and another devoting only 40% of her time weekly to PIO/Public Relations tactics and strategies.
Demonstrate the district's commitment to its service area through leadership and involvement in community organizations and appropriate community-wide endeavors.	Laurie Weidner & Judy Iannaccone	Year-long	Expand PR team to allow for a broader community relations program. District has limited visibility due to the reduction of the PAGR department.
Maximize existing technology to produce high-quality b/w and color copies for faculty and staff at the campuses, and district office programs/services.	Judy Iannaccone, Mark Hutchison & Ann Odle	Year-long	Continue to innovate and use existing and new equipment to produce quality printed tools for the campuses and district operations center. Deep staff reductions and the elimination of the off set press has caused workflow and deadline issues. An additional staff member and a Publications Specialist are needed to "traffic" jobs and ensure that the time-consuming finish work gets done on deadline.
Produce high-quality designed tools for online and print formats to advance the brands and reputations of the campuses and district office programs.	Penny Perkins, Eric Harsen, Eileen Vink & David Styffe	Year-long	Due to budget cuts and the reduction in staffing, the designers are limited in what they can do. Funds are needed to hire contracted designers as needed. Moreover, it is likely that one of the current designers will retire within the next year. The department needs the ability to fill this position with a qualified staff member. The district should invest in software and hardware upgrades to ensure these professionals have the tools they need to do their jobs. A professional-quality camera is needed for the graphic designer at SCC.
Advocate that all employees grow through professional development.	Entire team	Year-long	Fund professional development. PAGR staff have had no structured learning opportunities in 3.5 years. Staff currently pays for all of their own professional development. Restore budget to allow for the purchase of relevant subscriptions.

TECH  
PLAN

2009-2011 Goals	Progress Rating 1 – 10 (10 = completed)	Comments
<p><b>Internal</b> Support mission-focused communication with all employee groups to sustain a climate of open communication.</p>	2	<p>While PAGR is entrusted with employee communications, other divisions do not recognize the expertise and responsibilities of the department. The intranet is an underutilized tool that has not been used for strategic communication with employees. It is hard to navigate and is not user-driven or user friendly. The district and colleges regularly experience communication fragmentation as a result of the lack of a coordinated, strategic internal communications focus. The lack of coordination and the lack of deferral to the department regarding employee communications, in concert with the existing culture, restrict open communication and have contributed to confusion and employee morale issues. The culture is fractured and will require the new chancellor and PAGR to work together to unite the colleges and district office into a workable team. However, because the department effectively has only two practitioners (one FT and one focusing about 40% of her time on PR), strategies are limited. The department's functions must either be re-prioritized or the district will need to invest in staff and resources to enable a robust internal communications effort. One prudent investment would be for a contracted communications audit (conducted by an outside contractor), which will help hone messages and channels of communication.</p>
<p><b>External</b> Advocate the district's legislative priorities to elected officials at all levels of government.</p>	3	<p>Despite the lack of clerical support and overall resources, PAGR continues to keep the district and its leaders visible with elected officials. However, due to the lack of other available PR staff, the Executive Director has assumed more PIO duties and is devoting less time to advocacy. To bolster this goal, resources must be added to the department.</p>
<p>Enhance public perception of the colleges and district through proactive public relations strategies</p>	3	<p>With only 2 professional staff and no budget it is impossible to adequately meet this goal. Executive director is proud of the efforts made to date with no resources. Great progress has been made to utilize social media outlets. However, our success is hampered by the lack of staff and time. The district also has no budget to buy the digital video camera for social media applications. Invest in the department and progress will continue on this goal.</p>

Build and sustain strategic relationships to advance organizational goals using traditional and online communications strategies.	3	Without adequate PR and clerical support, this goal will not be attained. Community relations and strategic relationship development and maintenance take time and resources. The district, especially due to the hiring of the new chancellor, would benefit from a well structured relationship cultivation and management program that should be nestled with PAGR. This can be accomplished through a re-investment in the department.
Reinforce the college and district brands, underscoring program excellence, value, caring cultures, and high student success rates	2	Every effort is made to reinforce “the brand” on the web sites and through advocacy and media relations, and our limited community relations efforts. However, without resources our ability to reach this goal is impossible. Our visibility is minimal and fragmented at best. Branding is a critical component of enrollment management and is fundamental to the recruitment of qualified staff and management. The district must invest in unified brand promotion to sustain the district’s reputation.
Communicate the fiscal prudence and success of the Measure E-funded capital improvement program.	2	While this is emphasized in the only printed tool we produce ( <i>Rancho Visions</i> corporate portal) and the bi-annual Community Advisors presentations, Measure E should be supported with a comprehensive PR campaign that is sustained and funded annually. New visible signage is also needed at the campuses. Without resources, the public will not know what we have done and are doing on their behalf. This will impact our ability to pass bonds in the future.
Demonstrate the district’s commitment to its service area through leadership and involvement in community organizations and appropriate community-wide endeavors.	5	Both managers serve in community leadership positions, and that is all that can be handled given the lack of staff and clerical support. With the restoration of the budget and the addition of more professional staff, more can be accomplished.
Build and sustain strategic relationships to advance organizational goals using traditional and online communications strategies.	3	Without adequate PR and clerical support, this goal will not be attained. Community relations and strategic relationship development and maintenance take time and resources. PAGR is poised and ready to support the new chancellor with a new relationship management process/system. However, resources are needed.
Reinforce the college and district brands, underscoring program excellence, value, caring cultures, and high student success rates	3	Every effort is made to reinforce “the brand” on the websites and through advocacy and media relations, and our limited community relations efforts. However, without resources our ability to reach this goal is impossible. Our visibility is minimal and fragmented at best.

**TECH  
PLAN**

<p>Communicate the fiscal prudence and success of the Measure E-funded capital improvement program.</p>	<p>2</p>	<p>While this is emphasized in the only printed tool we produce (<i>Rancho Visions</i> corporate portal) and the bi-annual Community Advisors presentations, Measure E should be supported with a comprehensive PR campaign that is sustained and funded annually. Without resources, the public will not know what we have done and are doing on their behalf. Restoring appropriate marketing and printed promotional tools is essential for the visibility of Measure E and future capital improvement campaigns. This will impact our ability to pass bonds in the future.</p>
<p>Demonstrate the district’s commitment to its service area through leadership and involvement in community organizations and appropriate community-wide endeavors.</p>	<p>4</p>	<p>Two members of the team serve in leadership positions and that is all that can be handled given the lack of staff and clerical support. With the restoration of the budget and the addition of more professional staff, more can be accomplished.</p>
<p>Maximize existing technology to produce high quality b/w and color copies for faculty and staff at the campuses, and district office programs/services.</p>	<p>6</p>	<p>Despite more than a 50% reduction in the staffing of this unit, the two remaining Reprographics technicians continue to maximize the technology and their available time to produce quality work. The introduction of the new color copier will expand the breadth of work to be produced. District should consider bolstering staffing of the unit. A Publications Specialist is needed to “traffic” jobs and coordinate projects. This is taking 60% of the manager’s time. This is causing other departmental functions to go unaddressed completely or to suffer. Adequately staff the unit for increased overall productivity of PAGR team.</p>
<p>Produce high-quality designed tools for online and print formats to advance the brands and reputations of the campuses and district office programs.</p>	<p>4</p>	<p>Designers and desktop are limited in what they can do because of the reduction in staff and out dated hardware and software. Invest in additional equipment to sustain the quality of communications tools produced by the PAGR team.</p>
<p>Advocate that all employees grow through professional development.</p>	<p>1</p>	<p>Sadly, the department can only support this goal by allowing employees the time needed during the workday to pursue their goals. Resources should be provided for training and professional enrichment. We are the only PAGR department in the county that doesn’t support professional growth and pay for staff to attend lectures and workshops of relevance to the job responsibilities. This must change if the team is to remain “current” and viable.</p>

## Achievements Fall 2009-Spring 2010

### Strategic Initiatives

- Significant support to the colleges and district in the production of the accreditation documents for the October 2009 accreditation visiting team.
- Strategic advisement to chancellor and college presidents on an as-needed basis. Limited efforts due to focus on tactics due to lack of staff.

### Fiscal Efficiencies

- Launched the *Rancho Visions* blog to improve social media presence for RSCCD and colleges.
- Produced *Rancho View* in a PDF format to adapt to budget reductions.
- Enhanced intranet to carry vital information about the budget, crisis communications (AlertU), and the swine flu.
- Sought corporate sponsors to underwrite the refreshments for Community Advisors.
- Developed on-line tools to reach out to the community, including college Facebook fan pages.
- Maximized available technology – at no cost the district – to sustain brand visibility for the colleges and district.
- Shrewdly negotiated projects without outside printers and vendors to save money for the colleges and district.
- Use recycled paper for all internal communication.
- Direct all larger print jobs to Reprographics, as they can produce projects more affordably than the cost for color printing from desktop printers.
- Restricted the use of printing on the departmental color machine (cartridge costs more than \$700).
- Shared the camera (originally purchased by PAGR) with the Athletics Department at SCC to avoid a \$1,500 investment.
- Made use of an old monitor and adapter instead of investing in new equipment when an existing monitor, used by Graphic Communications, could not be repaired.
- Print both color and b/w copies in house (use right of first refusal protocol) to save district-wide resources.
- Researched and negotiated the lease of new production equipment that is increasing production and saving expenses to the district. The new color copier will save the district \$104,239.50 over a five-year contract period.
- Returned nearly \$3,000 to the General Fund for that one line item only (Publications unit – lease agreements) to bolster the ending balance in June 2010.
- All in all, the department has been frugal in all expenditures and has embraced a “make do” attitude.

### **Issues Monitoring and Communications**

- Supported Census 2010 campaign and voter information drives at campuses and Education Centers.
- Made every attempt to minimize the negative fall out from the Tam Tran Memorial Scholarship media debacle. Monitored blogs, online media, print and broadcast media for post-crisis debrief and messaging.
- Expanded surveying to employees to determine key messages and ascertain rumors to be addressed about the budget in the employee forums and lunches with the Chancellor.

### **Governmental Relations**

- Wrote two earmark applications – one for SCC and SAC. Both were well received by federal congressional staff. The earmark application for SAC continues to be in play and may be funded. The SCC application was “killed” due to Congressman Royce’s decision to veto and not support any earmarks – a Republican political platform agenda item.
- Staged a teleconference at SAC for the White House Initiative on Educational Excellence for Hispanic Americans.
- Initiated and coordinated a visit by Congressman Ed Royce to SCC to view the Science Center during construction.
- Initiated and have made attempts to bring Assemblymen Chris Norby and Curt Hagman to RSCCD campuses.
- Coordinated strategic meetings with Assemblyman Jose Solorio around textbook issues, resulting in the initiation of AB 2203.
- Developed letters of support and opposition.
- Coordinated district meetings with Senator Lou Correa and Assemblyman Chris Norby.
- Coordinated legislative participation in: KinderCaminata, SAC Athletic Hall of Fame, SAC Hall of Fame, graduation, and the opening of the Veterans Resource Center and Science Center opening.
- Lead two advocacy trips to Sacramento and one to Washington D.C.

### **Employee Communications**

- Expanded the intranet to include vital information for employees.
- Expanded communication around key issues from Alert U to the swine flu.
- Supported to the Chancellor and college presidents with timely, well-written material for inclusion in eBlasts to employees on topics of interest and concern.
- Staged spring employee forums to provide information on budget and negotiations.

### **Media Relations**

- Garnered 611 publicity placements in print, ethnic media, broadcast and online media between June 2009 and March 2010. If this space and airtime had been purchased in equivalent advertising dollars, the district would have spent \$657,367 to buy this visibility! The number of people reached by these stories was 63,980,289.
- Secured feature stories on topics pertaining to campus and district office priorities.
- Placed by-lined article for chancellor in *The Presidency*.
- Placed a feature on the chancellor in *Hispanic Outlook on Higher Education*.
- Managed media controversies to neutralize negative publicity, including those involving the Tam Tran Scholarship at SAC.

### **Community Relations**

- Maintained leadership positions on various appropriate committees supporting the business of the colleges and district office including the Orange County Human Relations Council, the Orange Chamber of Commerce, and the Santa Ana Business Alliance.
- Coordinated and staged a fall and spring meeting of the Chancellor's Community Advisors group.
- Led delegation from Orange Chamber on advocacy visits in Sacramento.
- Plans all speakers and events for the Governmental Affairs Committee of the Orange & Tustin Chambers.

### **Campus Communication**

- Devised and implemented effective online communication.
- Supported a wide range of on- and off-campus events and fund raisers with traditional and on-line communication.

### **Crisis Communications**

- Worked along side the college presidents and chancellor to implement the ICS structure.
- Provided the PIO function at SAC for a countywide POD exercise.
- Served as secondary and primary media spokespersons for the Tram Tran Memorial Scholarship.

### **Digital Communications**

- Supported Facebook, Twitter, LinkedIn and MySpace presences for both campuses.
- Expanded functionality of online registration capability for all events district wide.
- Expanded service to the college and district web committee.
- Launched a digital media archiving project to track and preserve valuable images and pieces of RSCCD's history.
- Identified new and affordable ways to use existing and emerging technology to enhance the mission and visibility of the colleges/district.
- Created and implemented new web sites or improved existing Web sites and features for a wide range of RSCCD programs.
- Assisted the college foundations by implementing an online auctions platform that doubled the revenue even though there was no real-time event.

### **Retirement Event planning/coordination**

- Coordinated the script, developed the graphic communications items, and orchestrated the video commemorative messages for the Celebration of Leadership event on April 29.
- Coordinated follow-up with sponsors including the marquee messages, the advertisement in the *El Don*, and a follow up story in the *Rancho Visions* blog.
- Developed the visual promotional items for the staff potluck on May 12 and the staff luncheon on May 26.

### **Measure E**

- Supported the staging of the opening of the SCC Science Center.
- Promoted Measure E achievements through the production of the annual Citizen's Oversight Committee Report.
- Promoted Measure E achievements in the script for the opening of the Science Center.
- Promoted Measure E achievements through the fall and spring Community Advisors meetings.
- Produced a one-page summary of Measure E achievements for the web site and the Community Advisors meetings.
- In the process of supporting the grand opening of the child development center at SAC in fall 2010.
- In the process of supporting the grand opening of the remodeling at CEC in fall 2010.



## Department Technology Plan

### Software

- Sustain investment in Cision, PRTrak, CapitolTrak and other communications tools to ensure the team has the tools needed to perform their jobs. Ensure that resources allow for appropriate upgrades.
- Purchase a relationship-related software package and support services as necessary to ensure that the district continues to cultivate strategic relationships. Ensure the product purchases enables the department to integrate relationship management with advocacy.
- Purchase the new graphic software suite for desktop publishers and graphic designers. (The software they are using is more than 5 years old and is no longer supported).

### Hardware

- Purchase new computers and accessories as needed for the PR team and support staff.
- Purchase digital cameras – one for the district office and one for SCC – to allow for production quality imagery.
- Purchase a digital video camera for web and social media implementation and networks.
- Purchase new upgraded computers for one graphic designer, the electronic media specialist, and both desktop publishers to accommodate software upgrades.
- Encourage ITS Vice Chancellor to include PAGR in discussions about upgrades and changes to the district web site and Intranet. Decisions should be rendered based on functionality and purpose, as well as price.

### Training

- Fund professional development to ensure all professional practitioners are well versed in social media tools and uses, so that these tools can be more fully integrated into strategic communications efforts.
- Train support staff in relationship software.
- Expand Datatel training to ensure greater efficiencies.

# Budget and Expenditures

Object Code	2009-2010		2010-2011		2011-2012	
	Budgeted	Expended	Budgeted	Expended	Budgeted	Expended
660000-52200-4210	2,498	1790	3,500		3,500	
660000-52200-5300	340	340	3500		3,500	
660000-52200-5805	0	0	650		650	
671000-52200-4610	2,995	2,995	3000		3000	
671000-52200-4620	282	282	1000		2000	
671000-52200-4710	0	0	2500		2500	
671000-52200-5100	3,000	3,000	15,000		15,000	
671000-52200-5220	0	0	600		600	
671000-52200-5651	725	725	725		725	
671000-52200-5800	4500	4500	50,000		100,000	
671000-52200-5830	133	133	200		200	
671000-52200-5880	14,400	14,400	14,400		14,400	
671000-52200-5940	15,000	15,000	50,000		50,000	
<b>TOTAL</b>	\$412,584*	TBD				
	* Reflects all line items . Not all are noted here.					

BUDGETS

## Budget and Expenditures

Object Code	2009-20010		2010-2011		2011-2012	
	Budgeted	Expended	Budgeted	Expended	Budgeted	Expended
677000-52500-4310	8,694	8,000	0		0	
677000-52500-4520	4,685	1,327	0		0	
677000-52500-4610	64,106	56,120	0		0	
677000-52500-4610	0	-25,563	0		0	
677000-52500-4620	2,595	2,595				
677000-52500-5100	1,000	575	0		0	
677000-52500-5220	0	0	0		0	
653000-52500-5535	685	685	0		0	
677000-52500-5550	300	300	0		0	
677000-52500-5610	248,448	244,619	0		0	
677000-52500-5630	230	210	0		0	
677000-52500-5631	1,259	495	0		0	
677000-52500-5660	11,000	10,112	0		0	
677000-52500-5940	25,572	4,100	0		0	
677000-52500-5940	0	-29,665				
677000-52500-6410	3,100	3,047				
<b>TOTAL</b>	\$368,574*	\$329,138 **\$55,228				
	<b>* Reflects all line items . Not all are noted here.</b>	<b>**Chargeback and Bookstore funds shown as negative expenditures.</b>				

SELF-  
STUDY

# Budget and Expenditures

Object Code	2009-20010		2010-2011		2011-2012	
	Budgeted	Expended	Budgeted	Expended	Budgeted	Expended
677000-52600-4210	106	56	0		0	
677000-52600-4520	257	0	0		0	
677000-52600-4610	4,161	1,355	0		0	
677000-52600-5520	191	0	0		0	
677000-52600-5630	215	210	0		0	
677000-52600-5815	33,961	33,960	0		0	
677000-52600-5845	127	71	0		0	
677000-52600-5950	2	0	0		0	
			0			
<b>TOTAL</b>	\$39,020*	\$35,652				
	<b>* Reflects all line items . Not all are noted here.</b>					

SELF-STUDY

## Self-Study

### Self-study standard questions:

**1. How do persons served by the program evaluate its adequacy, efficiency, and effectiveness?**

While no formal survey has been conducted, there appears to be recognition that PAGR is one of the leanest and most efficient operations in the entire district. We generate excellent results, given our small staff. Even as the staff now stands at 11 from 26 last spring, the team continues to produce quality products and juggle its many conflicting deadlines and priorities.

Resources are needed to conduct appropriate research – internally and externally – to tailor communication and channels of communication for maximum impact. Staff and funds are needed to rebuild the department and to broaden service delivery. There is just so much that can be done with one FT practitioner and another working only 30% of the time on PR!

**2. Are the services comparable in quality and scope to those offered by similar programs at other colleges?**

No! PAGR exceeds service and quality standards for every aspect of the communications spectrum. No other district has a team with our talent and years of experience. PAGR professionals are revered and admired by their peers for their skill and expertise. Our communications tools are emulated by colleges and districts statewide. However, with budget cuts, the department's staffing and scope of work lags behind every other district in the county. We are the only district with effectively 1.3 professional PR staff members for a district with more than 50,000 students.

**3. What efforts does the program make to continually upgrade its services?**

Even as the team is less than half the size it was in March 2009 and is operating with a 47% overall decline in budget, we continue to maintain service in all PR categories – although all services are significantly reduced and limited to available time and staff. Unfortunately, the team is burning out. Workload issues and reporting systems will need to be addressed to ensure the health and well being of the remaining staff.

SELF-  
STUDY

#### **4. How much progress has been made towards program goals?**

Progress is minimal as we are juggling responsibility in an attempt to provide service. We do our best with the few staff we have. There is very little that can be accomplished with no staff and no investment of resources in the department. For instance, the district's web site was last reconstructed more than seven years ago. The design is dated. The platform is limited and hard to navigate. We will not have a web site that is marketing oriented and useful for key constituents without a financial investment in software, hardware, and adequate PAGR staffing to ensure page continuity and freshness.

Even so, the team makes steady progress on all goals, even as the team is down to 1.3 professional PR staff.

#### **5. What are the strengths and weaknesses of the program?**

##### ***Strengths***

Superb quality of work and excellent messaging.

Creativity despite limited resources.

Positive can-do attitude by all staff who believe in the mission of the district and colleges.

##### ***Weaknesses***

The program has no weaknesses. It is strong and sound based on PR principles, given the available staff and resources. However, there are fundamental weaknesses in this team which stem from their passion for the profession and the commitment to their work. The volume of work and expectations cannot continue without support and resources.

##### ***Barriers to success***

The expertise of the department is not always valued resulting in communication fragmentation and poorly executed efforts.

Departmental morale is often low as staff feels diminished by colleagues who do not respect their professional expertise. While this is a common problem for any internal PAGR team, this climate inhibits the team from providing appropriate leadership.

The continual lack of investment in the department has hampered the success of the professionals. How can we bolster media relations efforts when we effectively have one person doing everything for the district and colleges? How can web sites improve with one staff member and no financial investment in tools and training to ensure our sites are visually stimulating and contain current, relevant content?

**6. How successful has the department been in obtaining grants?**

PAGR has been successful in securing earmarks for SAC. Efforts were made this year to secure an earmark for SCC. The SAC earmark application is still in play and may be funded in fall 2010. PAGR supported the \$3 M Early Head Start grant with letters of support from Congressman Ed Royce, Senator Barbara Boxer, and Mayor Miguel Pulido.

We can do more to help colleagues if they will involve us early in the process, and are happy to write template letters of support and arrange for meetings with key legislative staff. PAGR has coordinated special VIP visits to campuses for elected officials and their staff to see our programs in action and to discuss grant application and new program goals face-to-face. One example includes the strategic meeting with Congressman Ed Royce in January 2010, which supported the submittal of the SCC earmark application for a Science Learning Center.

Working with the grants office for the district operations center, as well as campus deans and vice presidents, PAGR coordinates visits to key state and federal agencies to learn more about pending funding opportunities. This information has provided RSCCD with a strategic advantage in the application submittal process.

PAGR requests the ability to support grant applications with governmental affairs.

In addition, PAGR does an outstanding job of promoting the awarding of grants, garnering media coverage.

**7. What future trends are expected to impact resource development?**

While resources are desperately needed for PAGR to sustain the district and colleges' brands, it appears that the department will continue to have limited financial and staff resources through 2011. It is never wise to reduce public relations and marketing during an economic downturn, as these are critical business functions that support fiscal prosperity and market dominance. The PAGR professional team has grave concerns about the future enrollment trends of the colleges given the lack of investment in developing outstanding user-friendly (and student tested) web sites, social media tools, and other public relations strategies that are necessary to sustain brand visibility and brand value. Perception is everything in competitive markets, and PAGR is responsible for sustaining favorable perceptions through advocacy, community relations, public relations, marketing and other communications strategies. This is very difficult to do with limited resources.

## **Recommendations**

### **Restore professional staff**

Even with national award winning staff, there are too few hands to accomplish the needs and work for a district the size of RSCCD. Professional staff is needed to rebuild the district's marketing/communications program and to broaden our reach and visibility through social media channels. In 2010-2012, it would be important to expand the main district PAGR team with an additional Communications Specialist, to promote the electronic media specialist to manager, and fill the electronic media specialist position with another skilled professional with superb writing skills and knowledge of social media marketing.

Allow PAGR to fully staff the Graphic Communications and Publications Units with qualified, skillful managers who can maximize the productivity of those units. With the one existing manager covering both the supervision of the Publications Unit and exiting duties, less and less time is devoted to PR, media relations, and other important departmental functions.

### **Restore clerical support**

Clerical staff is needed to maximize efficiencies. At least one additional clerical person is needed for the smooth functioning of the department. This staff position should be restored by 2011-2012. This staff member is needed to build and sustain the database for an efficient relationship management program, and for the restoration of the department's role in marketing/advertising. The existing clerical staff cannot handle any additional responsibilities. Both are working at capacity and cannot add on other duties. Additional staff are needed for overall efficiency.

### **Restore budget**

PAGR's budget has been reduced by 47% overall. The marketing/advertising budget has been cut by 87%, only allowing the district to maintain its membership in chambers of commerce. With budget and additional staff, PAGR will continue to produce award-winning work and will continue to lead the regional with fresh and innovative marketing communications tools. Funds are also needed for equipment and software acquisition and research tools to ensure the maximum efficiency of communications strategies.

**RECOM  
MEND.**



## **Business Implications**

Every part of the district's culture and its reputation in educational circles will eventually be impacted by increased reductions of staff and resources in PAGR. A sustained lack of investment will advantage neighboring districts, as they have not cut their district or campus PAGR budgets. Many continue to invest in the PAGR function knowing that RSCCD has significantly reduced its investment in PAGR! With limited staff and resources, the PAGR team fears that we will no longer be able to respond in proactive manner to opportunities or avert crises – although we will continue to do our best with the time and resources we have. All departmental activities will be scaled back and/or eliminated according to available resources. Only the Board's and Chancellor's top priorities will be addressed, if resources continue to dwindle.

PAGR is responsible for promoting good will and keeping the college and district brands visible to potential students, voters and those who shape policies at local, state and federal levels of government.

Reduced visibility will hamper the district's ability to sustain its leadership position, as PAGR provides a vital internal and external "cheerleading function" by promoting messages that shape and sustain favorable perceptions.

**RECOM  
MEND.**