



RANCHO SANTIAGO

COMMUNITY COLLEGE DISTRICT

Santa Ana College • Santiago Canyon College



District Operations Department Portfolios

for Planning, Evaluation, & Resource Allocation

2009-2011



Planning and evaluation occurs 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.

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Rancho Santiago Community College District

District Operations Planning Portfolio

2009-2011



Auxiliary Services

Department

ORG. CHART

FUNCTIONS

GOALS

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PLAN

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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

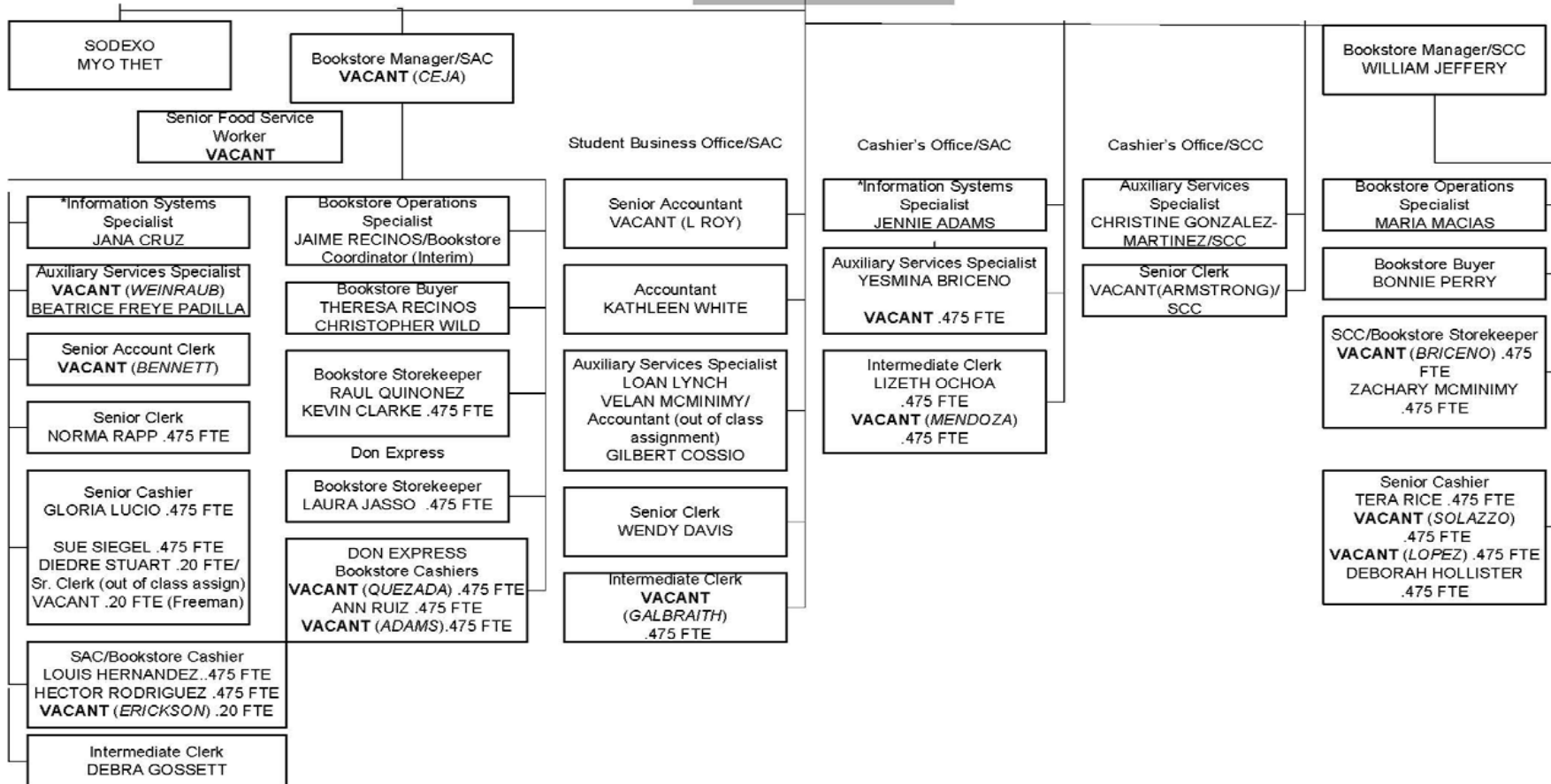
BUDGETS

SELF-
STUDY

RECOM
MEND.

Organization Chart

Director
Auxiliary Services
RHONDA LANGSTON



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.		
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.		
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.		
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.		
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.		
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.		
Review and assess the Food Service operation and develop a strategic plan to provide a quality, reasonably priced, comprehensive food service program		

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
TOTAL	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
TOTAL	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
TOTAL	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

Department

ORG. CHART

FUNCTIONS

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RECOM
MEND.



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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.

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ORG. CHART

FUNCTIONS

GOALS

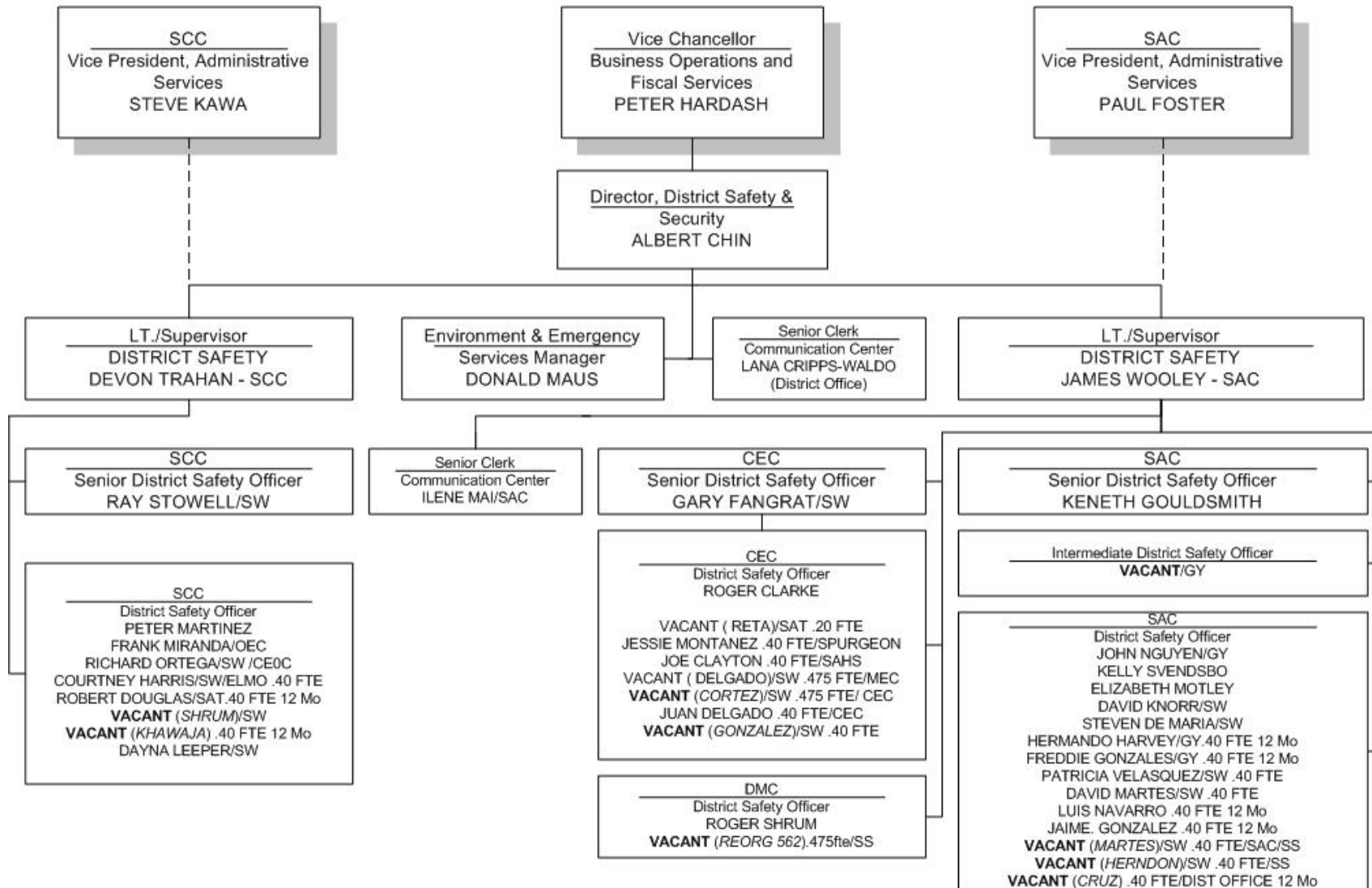
TECH
PLAN

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RECOM
MEND.

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 (OCEMO)
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 (to be completed in 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		
Provide a variety of emergency preparedness training opportunities, including table-top exercises, drills and joint exercises with outside/local agencies		
Review parking citation issuance and collection program		
Increase use of security hardware systems to protect our people and facilities district-wide		
Coordinate an "active shooter on campus" tabletop exercise at each campus		
Review patrol vehicle pool, to ensure safe and fuel efficient vehicles are selected to replace worn-out vehicles		
Coordinate a district-wide First Aid/CPR class for employees		
Improve Emergency Operations Center capabilities at each campus		

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
TOTAL	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
TOTAL	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.

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

Department

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

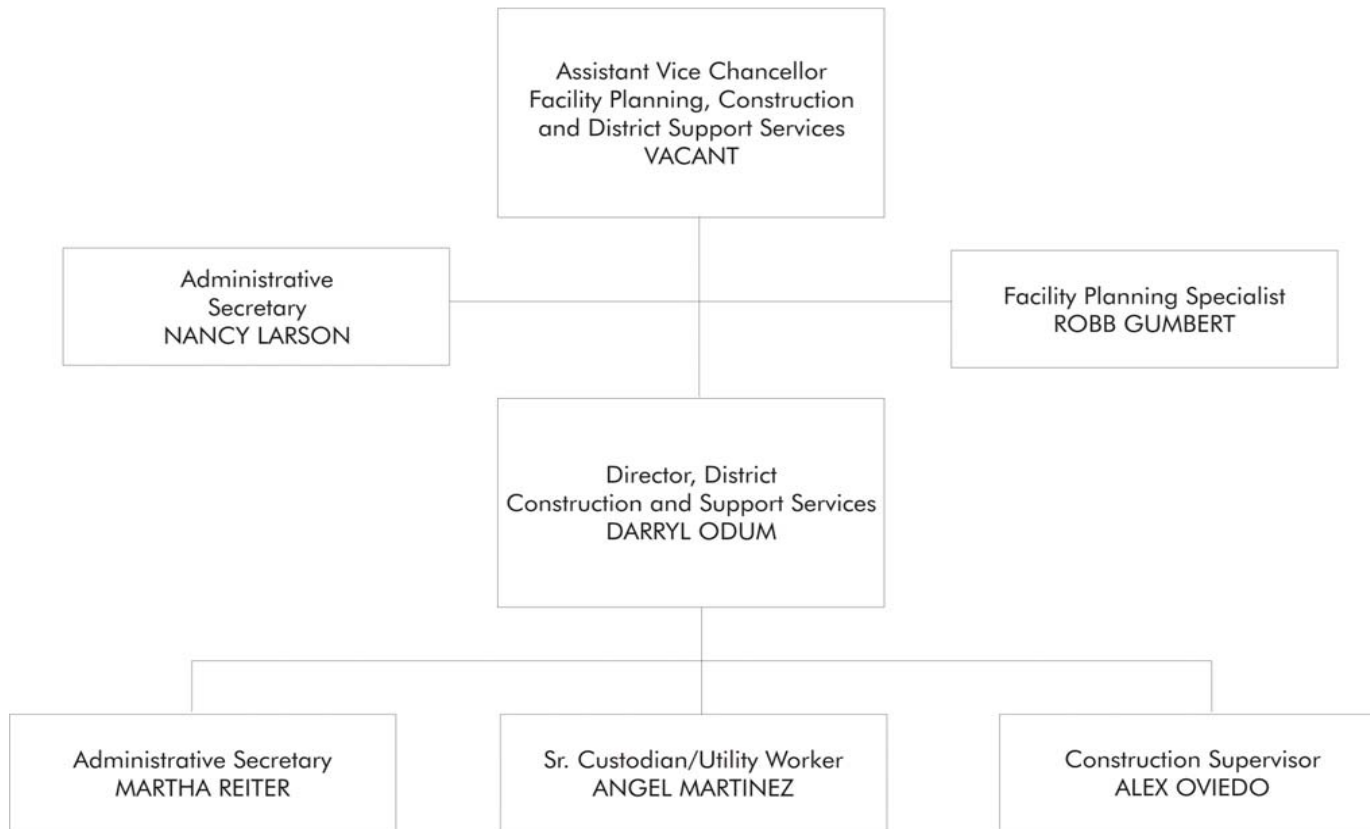
BUDGETS

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 (to be completed in 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	Complete.
2. Continue with the construction of the Child Development Center at Santa Ana College.	3	Project is 15% complete.
3. Continue with the construction of the Gym Restroom Addition at Santa Ana College.	5	The gym floor is 100% complete, and the restrooms are 20% complete.
4. Completion of the Fire Alarm Replacement at Santa Ana College.	5	The first phase of the Fire Alarm Replacement is 100% complete, and the second phase is 20% complete.
5. Completion of the 12-inch Fire Water Line at Santa Ana College.	9	The 12-inch Fire/Water line is 90% complete.
6. Complete construction of the Maintenance & Operations Building at Santiago Canyon College.	8	The Maintenance & Operations Building is 80% complete.

GOALS

7. Complete construction of the Science Building at Santiago Canyon College.	8	The Science Building is 80% complete.
8. Relocate existing portables in the path of the planned Aquatics Center.	1	The project is out to bid with bids due early November 2009.
9. Develop an RFP for Construction Management Services for future construction projects at Santiago Canyon College.	10	Proposals have been received and being evaluated.
10. Provide support to colleges to meet their needs for newly constructed or remodeled facilities.	5	These meetings are on-going.
11. Work with college staffs to define roles and responsibilities as they relate to facilities.	7	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		
TOTAL	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		
TOTAL						

* 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?

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

Department

ORG. CHART

FUNCTIONS

GOALS

TECH
PLAN

BUDGETS

SELF-
STUDY

RECOM
MEND.



Portfolios for Planning

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ORG. CHART

FUNCTIONS

GOALS

TECH
PLAN

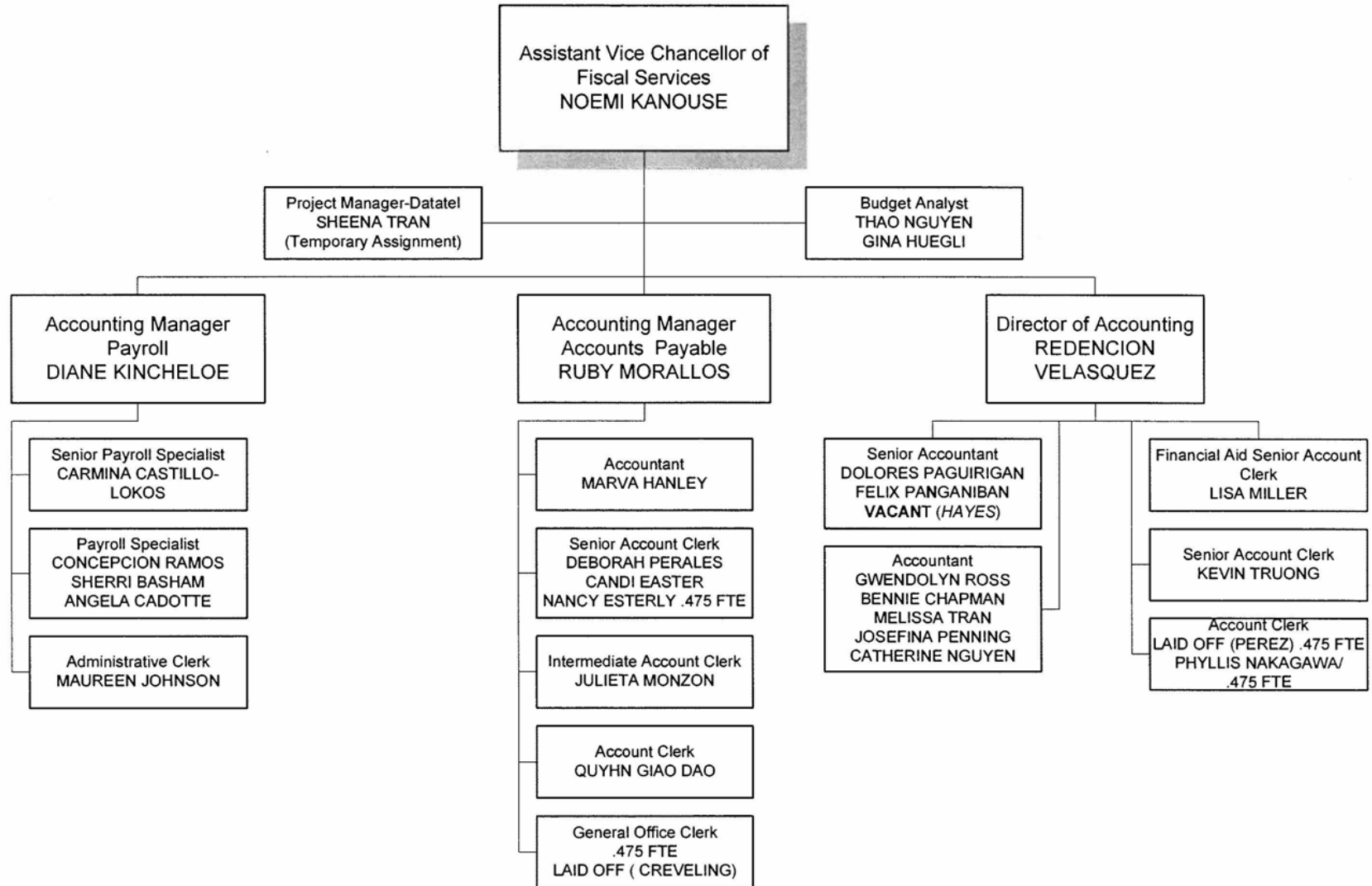
BUDGETS

SELF-
STUDY

RECOM
MEND.

Organization Chart

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	Needs to coordinate with ITS on software vendors
9. Work with ITS in developing reports needed for Banked LHE, Enrollment, Other Student Fees and Attendance Reporting for CCFS-320.	Fiscal Services	1/10/2010	

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	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 Module in TNAS at OCDE.	Payroll	6/30/2010	
15. Train staff at sites in the use of TNAS for Leave maintenance at the site level.	Payroll	6/30/2010	
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 (to be completed in June 2010)

2009-2011 Goals	Progress Rating 1 – 10 (10 = completed)	Comments
1. Provide analytical support for budget process in shared governance contract.		
2. Strengthen internal controls to safeguard assets.		
3. Develop/revise procedures for fiscal services related to budgeting, accounting, payroll, accounts payable and Datatel project management.		
4. Enhance the use of technology throughout district and college departments.		
5. Enhance communication between district departments and colleges.		
6. Continue department training on Datatel.		
7. Continue to implement Datatel integration by linking student cashiering and student accounts receivables.		
8. Coordinate the processing of 1098-T reporting between GLINK system and Colleague system for calendar year 2009.		

GOALS

9. Work with ITS in developing reports needed for Banked LHE, Enrollment, Other Student Fees and Attendance Reporting for CCFS-320.		
10. Begin revision of the Budget Allocation Model.		
11. Collaborate with IT and consultants to prepare, test and document programs to process Datatel Payroll reports for input into OCDE Payroll system.		
12. Collaborate with Orange County Dept. of Education to implement their Employee Leave System (TNAS).		
13. Implement further use of Hours Worked Module in TNAS at OCDE.		
14. Implement further use of Site Timekeeper Module in TNAS at OCDE.		
15. Train staff at sites in the use of TNAS for Leave maintenance at the site level.		
16. Audit and analyzes Medical, Dental, Vision, Life Insurance and TSA billings for employees, dependents, retirees and cobras.		
17. Implementation of electronic reporting of Form 1099.		
18. Provide timely payment to students for financial aid, stipends and refunds.		

GOALS

<p>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.</p>		
<p>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.</p>		
<p>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.</p>		
<p>22. Monitor that 1099 payments are correctly identified and reported.</p>		

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
- 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)

GOALS

- 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
TOTAL	3,031,781	2,902,789	2,621,035	2,621,035	2,621,035	2,621,035

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

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

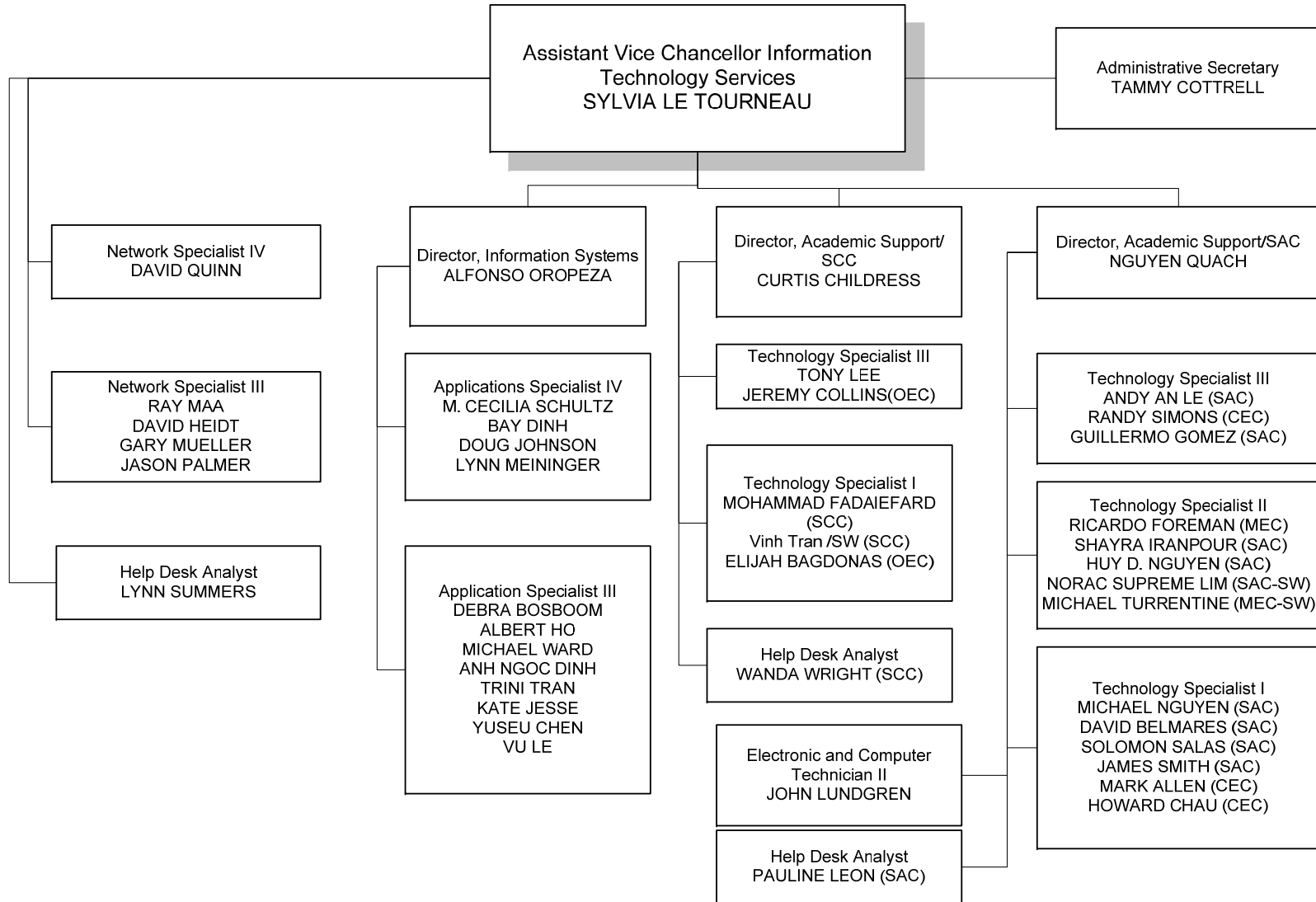
TECH
PLAN

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
Evaluate, purchase, and implement a Document Imaging/Management System	Sylvia LeTourneau	June 2011
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	June 2010
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 inventory system	Nicholas Quach/Curt Childress	June 2011
Evaluate printer repair strategy	Nicholas Quach/Curt Childress	June 2011

GOALS

Progress Toward Goals (to be completed in June 2010)

2009-2011 Goals	Progress Rating 1 – 10 (10 = completed)	Comments
Understand and Streamline Datatel's MIS Procedures	2	As the Application Development team begins to process MIS and State reporting as it integrates with Datatel, quality control reports will be written for end users to proof data prior to term processing. This will insure valid data and faster MIS reporting.
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	7	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.
Evaluate, purchase, and implement a Document Imaging/Management System	1	A committee has been formed to manage the vendor selection process.
Evaluate and Purchase Enterprise Storage Device including Backup solution	0	
Purchase email and document archiving solution	4	Vendor solutions have been evaluated. This is on target for completion by June 2010.

GOALS

Progress Toward Goals (to be completed in June 2010)—Continued

2009-2011 Goals	Progress Rating 1 – 10 (10 = completed)	Comments
Purchase firewall, intrusion prevention system, and bandwidth management replacement solution	7	Vendor solution has been identified and testing. On target for June 2010 implementation
Purchase and replace Academic Servers	3	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 inventory system	0	
Evaluate printer repair strategy	0	

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	--	--	--	--	--	--
TOTAL	8,980,819.00	8,630,205.27	9,702,998.00	8,815,158.20	9,386,941.00	9141966.00
*5665-Fixed Maintenance Costs	2,033,197.00	2,033,186.94	2,428,916.00	2,386,339.50	2,329,700.00	2329700.00

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

Department



ORG. CHART

FUNCTIONS

GOALS

TECH
PLAN

BUDGETS

SELF-
STUDY

RECOM
MEND.



Portfolio for Planning

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ORG. CHART

FUNCTIONS

GOALS

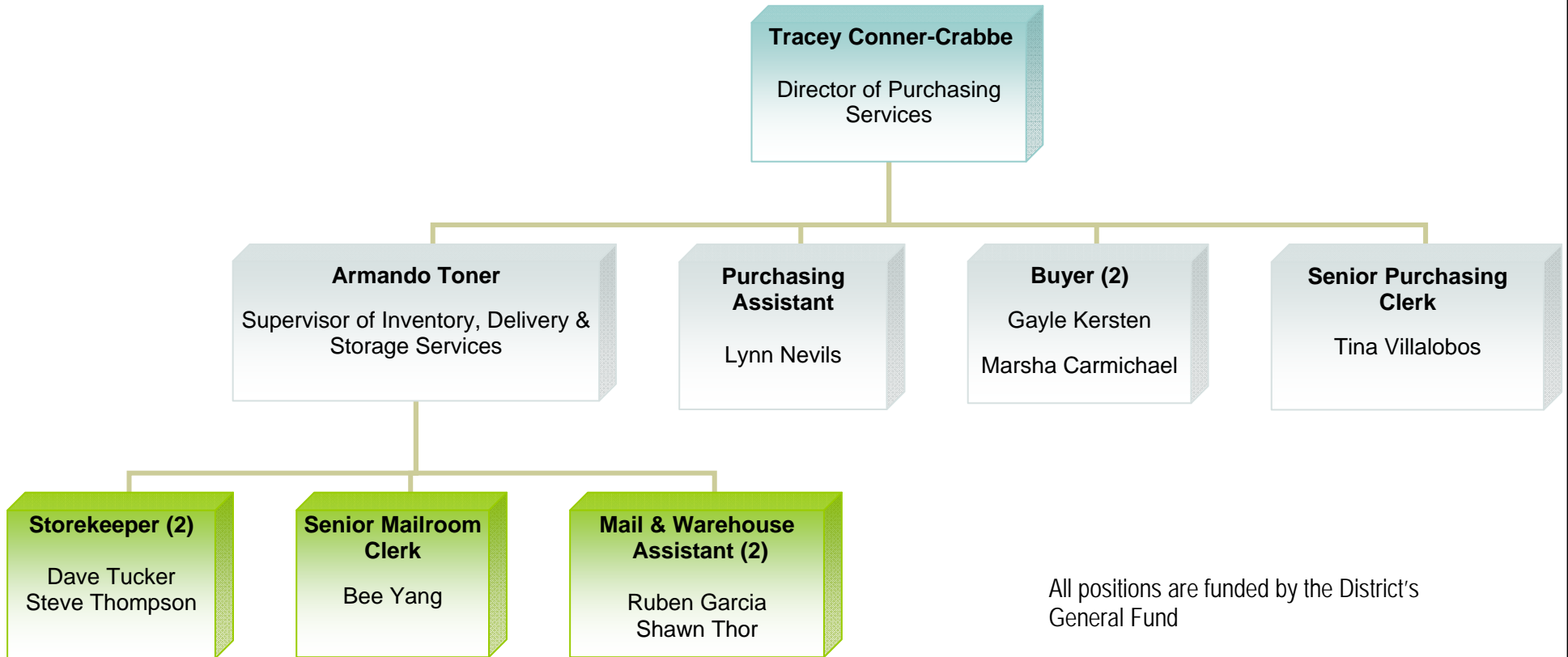
TECH
PLAN

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

Services:

- 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.

FUNCTIONS

Functions

- 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.

Warehouse & Inventory Control

Services:

- 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.

FUNCTIONS

Functions

- 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

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.

FUNCTIONS

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

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

GOALS

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	June 2010	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	May 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 (to be completed in 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	7	
Complete district wide physical inventory and reconciliation of discrepancies	5	
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.	1	
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						
TOTAL						

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

- 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.

**Support Services Departments
Planning Portfolio**

Human Resources/Risk Management

Department

District Office
SCC/SAC/DO



ORG. CHART

FUNCTIONS

GOALS

TECH
PLAN

BUDGETS

SELF-
STUDY

RECOM
MEND.



Portfolios for Planning

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ORG. CHART

FUNCTIONS

GOALS

TECH
PLAN

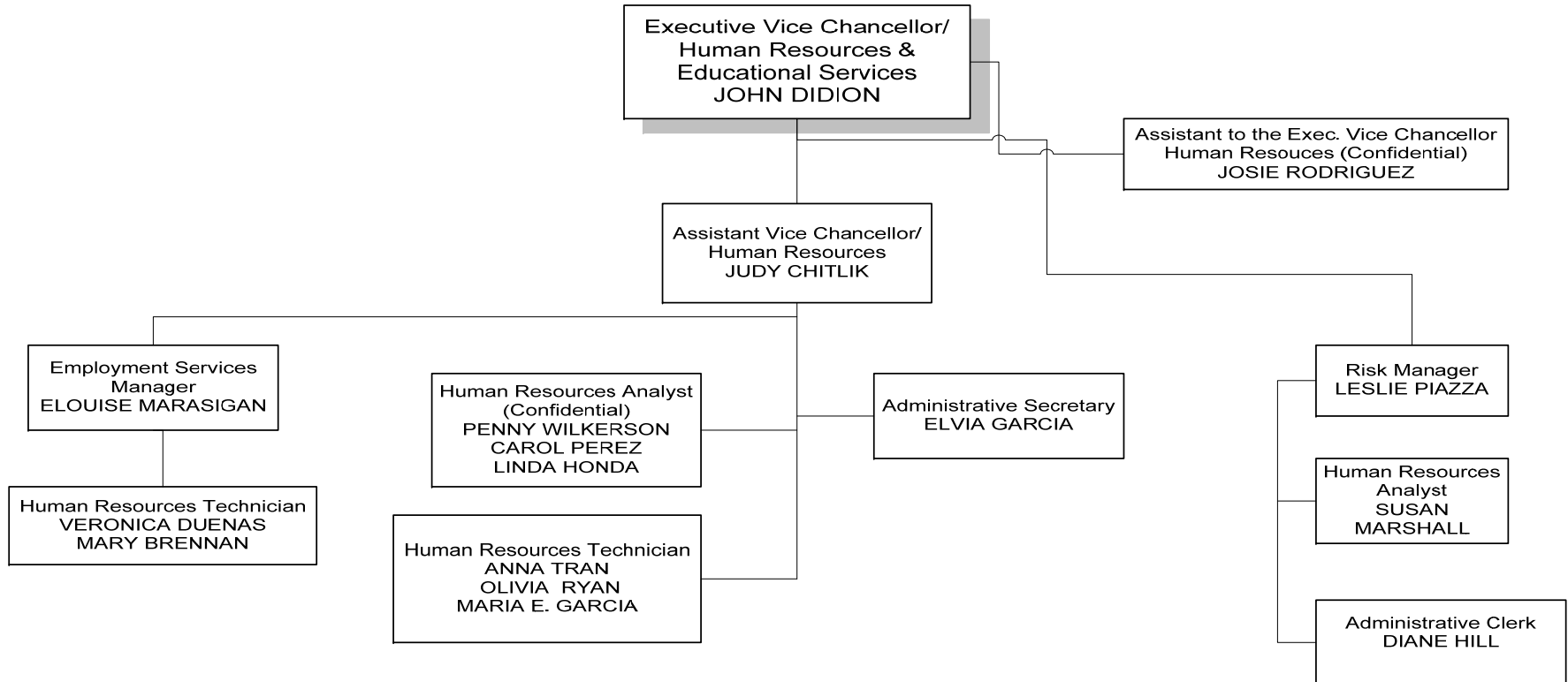
BUDGETS

SELF-
STUDY

RECOM
MEND.

Organization Chart

Rancho Santiago Community College District Human Resources and Risk Management



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 2009-2010 (Previous Year)

2009-2010 Goals	Progress Rating 1 – 10 (10 = completed)	Comments
Datatel Implementation	8	Most elements complete. OCDE payroll interface still in development
Employee benefit program implementation	10	Second year of use is complete
Restructure staff due to budget reductions	5	Major portion of RIF is complete
Provide viable voluntary health plans for part-time employees	3	Initial offering planned for 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
1000	325,475	325,475	325,475			
2000	756,193	758,637	732,267			
3000	403,857	404,251	398,666			
4000	8,968	6,090	4,780			
5000	97,808	63,590	64,892			
6000	2,756	2,343	4,346			
TOTAL	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			
TOTAL	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

2009-2011



Child Development Services

Department

ORG. CHART

FUNCTIONS

GOALS

TECH
PLAN

BUDGETS

SELF-
STUDY

RECOM
MEND.



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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

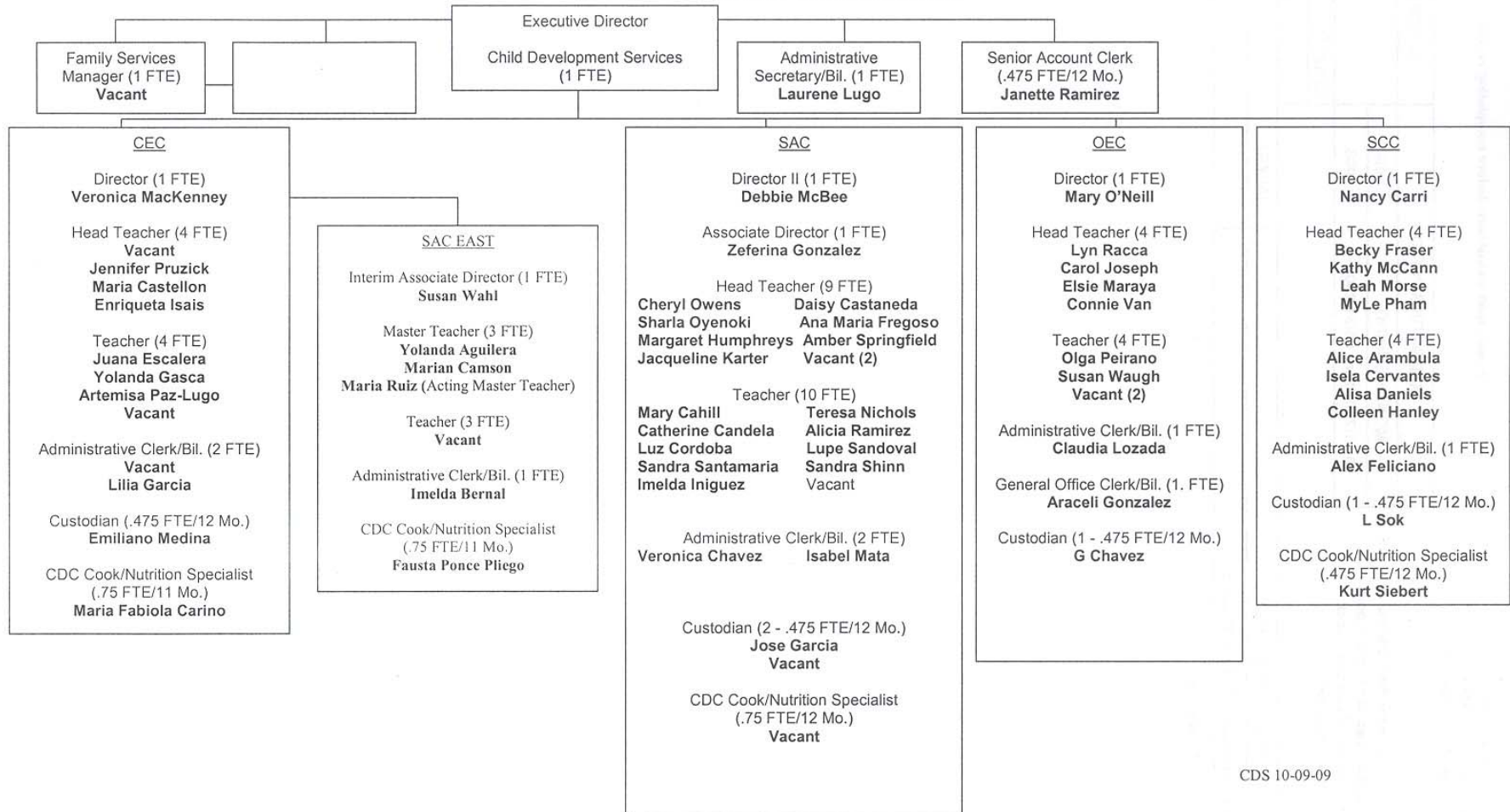
BUDGETS

SELF-
STUDY

RECOM
MEND.

Organization Chart

Rancho Santiago Community College District
 EDUCATIONAL SERVICES
 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

1. Annual goals (including staff development goals) – created at beginning of each school year

Goals 2009-2010

- Advance and strengthen parent involvement and education.
- Expand teaching team skills using DRDP-r and ECERS/ITERS as intentional strategies for effective children's learning.
- Strengthen, promote, and educate children, families and staff in the areas of nutrition and healthier food choices.
- Enhance and strengthen staff leadership skills in center program operations, public presentations, and teambuilding.
- Fully implement EdUPlay at SCC and SAC by creating a quality service in response to market needs.
- Successfully maintain NAEYC accreditation status.
- Monitor and maintain fiscal stability and accountability at all levels of the Child Development Services operations.

GOALS

2. Progress towards goals – created at end of each school year

GOALS 2008 – 2009

- Child Development Services staff was provided opportunities to discover and advance their strengths, talents, and potential as future leaders in the field.
- The focus on family-centered care through the partnership of staff, families and community was strengthened.
- The number of children increased (as rated by mandated instruments) to the integrated level in the area of math, including, counting and quantity, classification, measurement, understanding and patterning.
- Healthy lifestyles were emphasized with outdoor games and other exercises as well as a focus on healthy foods and eating.
- The Peer Review process (teachers learning from each other) was strengthened by incorporating a focus area and goal and by merging the Peer Review focus area and goal with the Early Childhood Environmental Rating Scale (ECERS).

3. Other accomplishments – created at end of each school year

- February, 2009 opened additional center to serve 144 4-year-old children in part day services
- Funded by Merage Foundation for a second year to strengthen transitions from preschool to public school through the Kinder Connect project.
- Continued to investigate income stream to support mission through social enterprise.

GOALS

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		
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		
Enhance and strengthen staff leadership skills in center program operations, public presentations and teambuilding.	Gwen Morgan-Bezell Dee Tucker CDS Administration Team		
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		
Fully implement EdUPlay by creating a quality service in response to market need.	Debbie McBee Nancy Carri CDS Administration Team		
Successfully maintain NAEYC accreditation status.	CDS Administration Team CDS Site Staff		
Monitor and maintain fiscal stability and accountability at all levels of the CDS operations.	Dee Tucker CDS Administration Team CDS Site Staff		

GOALS

Progress Toward Goals (to be completed in June 2010)

2009-2011 Goals	Progress Rating 1 - 10 (10 = completed)	Comments

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		2010-2012	
	Budgeted	Expended	Budgeted	Expended	Budgeted	Expended
1000 Academic Salaries		\$ 2,220,334	\$ 2,088,041			
2000 Classified Salaries		1,213,441	1,148,944			
3000 Employee Benefits		1,269,735	1,188,075			
4000 Books and Supplies		277,182	215,749			
5000 Services and Other Operating Expenses		78,738	106,880			
6000 Sites, Building, Books, and Equipment		67,117	84,988			
7000 Other Outgo		263,091	145,450			
TOTAL		\$ 5,458,949	\$ 5,050,193			

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 .

4. 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

Research Department



ORG. CHART

Research Department Organization Chart

(effective 06/08/2009)

Nga Pham
Director of Research

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

Cristina Gheorghe
Research Assistant

50% Matriculation/ 50%
District Match,
Matriculation

Robert Hirsch
Research Analyst

100% Matriculation

Rudy Tjiptahadi
Research Analyst

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), assessment practices validation, student demographics, enrollment trends, and surveys of current and former students.

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

Goal	Responsible Person(s)	Completion Date	Resource Needs
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 2009	
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.	4	Datatel student records went live April 2009 so it is now our “turn” to work with project managers to work on data warehouse migration to Datatel data elements.. Meetings were held in May/June to formulate and convey our needs to ITS for implementation. Consultations/coordination will be ongoing.
Follow-up on recommendations of 2007-08 program review.	7	Datatel migration issues are just now “on the table” and being discussed; Faculty’s hope to have direct access to data (beyond ISDS) may come with the now-in-place Datatel system; development of SLO assessments for faculty continues.
Coordinate the OEC Need Assessment process for center status.	7	The OEC Need Assessment process is currently in a holding stage insofar as Research is concerned; we will continue to coordinate activities as the process moves forward and need arises.

GOALS

Research Department Technology Plan

(Include software, hardware, and training needs)

Technology in the Research Department is current in 2009. Ideally, if funding allowed, a license for mapping software (ArcGIS/Arc View 9.x) would be purchased at an approximate annual cost of \$350. In recent years, we had access to the software via the Workforce Development Department but they no longer maintain that license. A scanner and optical character recognition software (OCR) would enhance our department's efficiency, as well.

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.

- **Knowledge Management.** Compile an electronic library of class schedules, catalogs, various forms used by college programs/departments, and reports. These resources are collected in individual personal libraries within the department, but it would be advantageous to maintain an easily-accessible online collection. Explore the possibility use of existing Microsoft Office 2007 SharePoint Server to achieve this goal.
- **Develop and maintain a comprehensive data element dictionary for the data warehouse.** A data dictionary was developed for our data warehouse at its inception but the imminent bridging of those new data elements to our data warehouse will bring with it a new set of definitions and coding. 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.
- **Install Oracle SQL Developer and receive 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)						
Classified Management	\$99,955.00	\$8,210.85				
Classified Employees	43,593.00	3,633.30				
Benefits	34,395.00	3,025.06				
Supplies	300.00	0				
Mileage	240.00	0				
Software support/license	3186.00	0				
Contract repair service	750.00	0				
Printing	195.00	0				
Basic Skills Initiative (2001)						
Classified Employees	\$34,230.00	0				
Conference	3,000	0				
Benefits	6,701	0				
Equipment/software	4,880	0				
Supplies	1,800	0				
GEAR-UP/Years 2 and 4 (1507/1508)						
Classified Management	823.00	432.15				
Classified employees	27,747.00	2,208.88				
Benefits	13,487.00	1146.11				

BUDGETS

Object Code	2009-2010		2010-2011		2011-2012	
	Budgeted	Expended	Budgeted		Budgeted	Expended
VTEA (1800)						
Classified employees	\$31,709	\$2,642.00				
Benefits	12,569	1,056.05				
Supplies	500.00	0				
Software support	500.00	0				
Non-Credit Matriculation (2490)						
Classified employees	\$63,972.00	\$5,837.67				
Benefits	24,267.00	2,593.11				
Supplies	500.00	0				
Contracted services	700.00	0				
Matriculation (2414)						
Classified employees	\$91,306.00	\$7,924.59				
Benefits	34,395.00	3,025.06				
Software support/license	1,510.00	0				
TOTAL	\$553,117.00	\$ 43,139.06				

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.

SELF-
STUDY

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.

SELF-
STUDY

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.

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



ORG. CHART

FUNCTIONS

GOALS

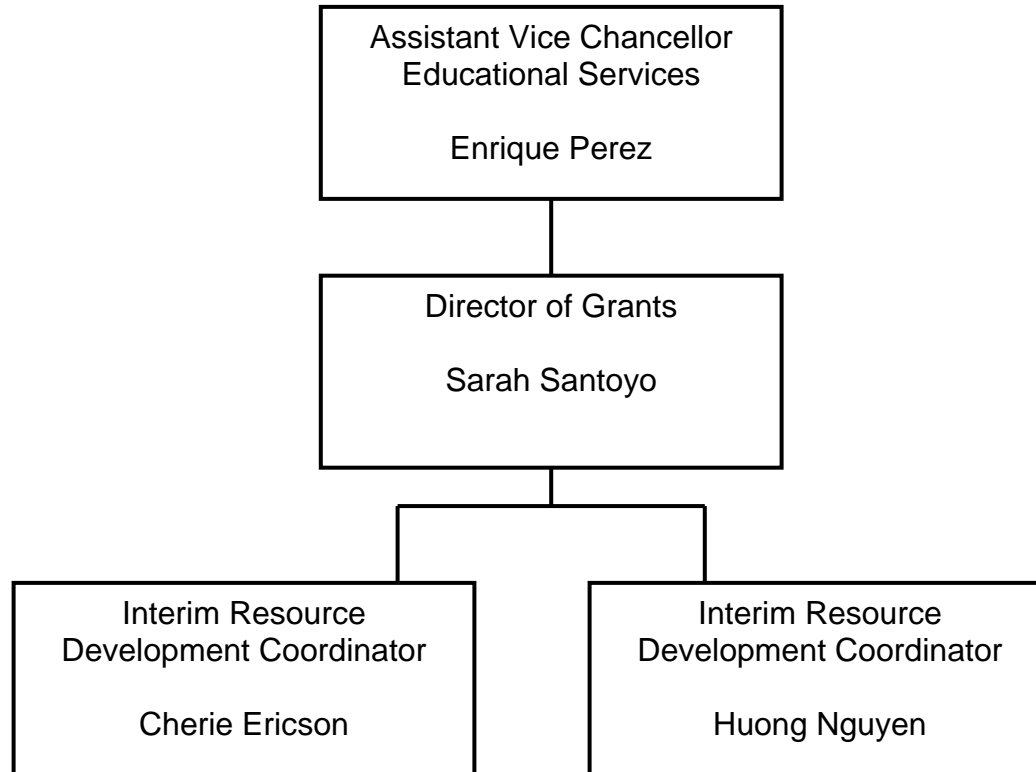
TECH
PLAN

BUDGETS

SELF-
STUDY

RECOM
MEND.

Organization Chart



ORG. CHART

Functions

Functions and services provided by the department:

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		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 Cherie Ericson Huong Nguyen		Computers Printers Access to online journals
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 Cherie Ericson Huong Nguyen		Additional staff
Engage in various and consistent communication efforts to better inform administrators and staff about Resource Development services, grant opportunities and awards, grant development, and grant management.	Sarah Santoyo Cherie Ericson		Supplies for informational and training materials

GOALS

Progress Toward Goals (to be completed in June 2010)

2009-2011 Goals	Progress Rating 1 - 10 (10 = completed)	Comments

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
TOTAL						

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 the department 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. Resource Development should develop a strategic communication plan to 1) notify appropriate administrators and staff of grant opportunities, 2) announce grant awards to inform district employees of new projects, and 3) educate administrators and faculty on grant development management.
2. When the district is in a position to do so, a staff member should be hired to review grant paperwork (budget change and status change forms) for accuracy; distribute status change forms sent to Resource Development for approval to the appropriate staff member; run customized budget reports; maintain files according to audit standards; assist with proposal and contract preparation (copies, page numbering, mail labels, etc.); prepare copies of the docket face sheets and maintain the docket file; take completed forms (i.e., signed by Resource Development) to appropriate district departments, and to perform other clerical duties as needed.
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 that 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



Digital Media Center

Department

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

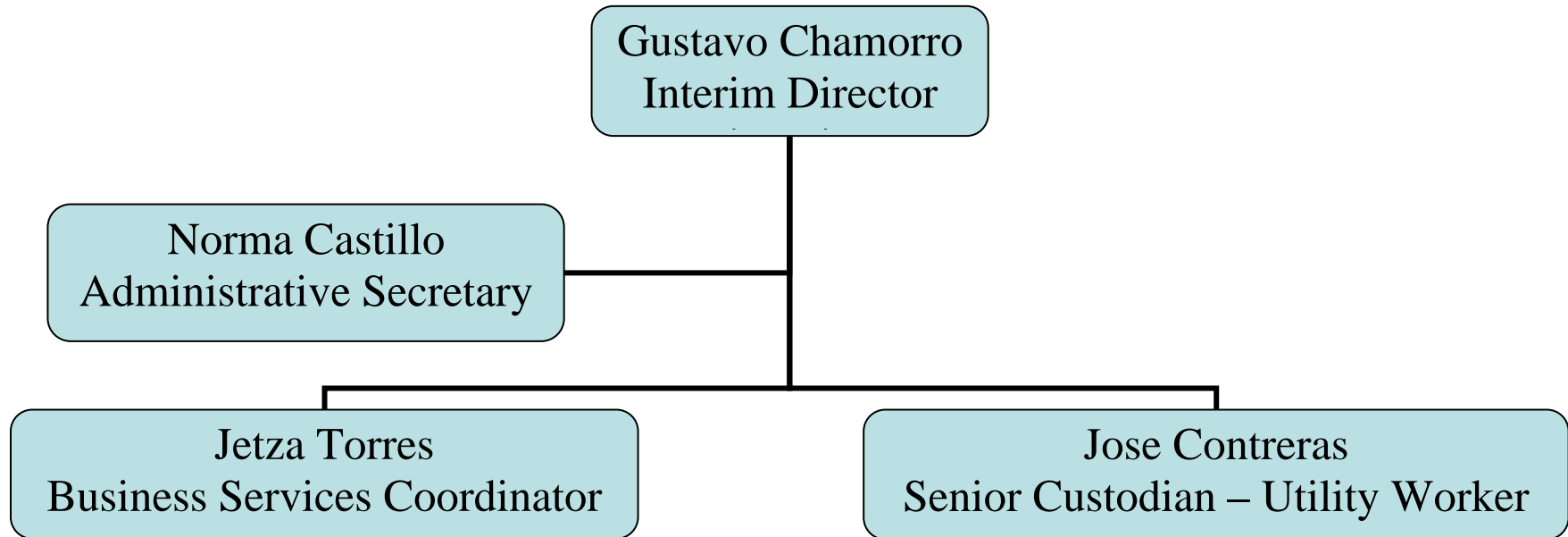
TECH
PLAN

BUDGETS

SELF-
STUDY

RECOM
MEND.

Organization Chart



ORG. CHART

Functions

Functions and services provided by the department:

1. Leadership as a hub for digital media 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, legal and financial advice and human resources management.
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 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 (to be completed in June 2010)

2009-2011 Goals	Progress Rating 1 - 10 (10 = completed)	Comments

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
TOTAL						

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 in 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.

Rancho Santiago Community College District

District Operations Planning Portfolio

2009-2011



Orange County Center of Excellence (COE)
Department

ORG. CHART

FUNCTIONS

GOALS

TECH
PLAN

BUDGETS

SELF-
STUDY

RECOM
MEND.



Portfolios for Planning

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ORG. CHART

FUNCTIONS

GOALS

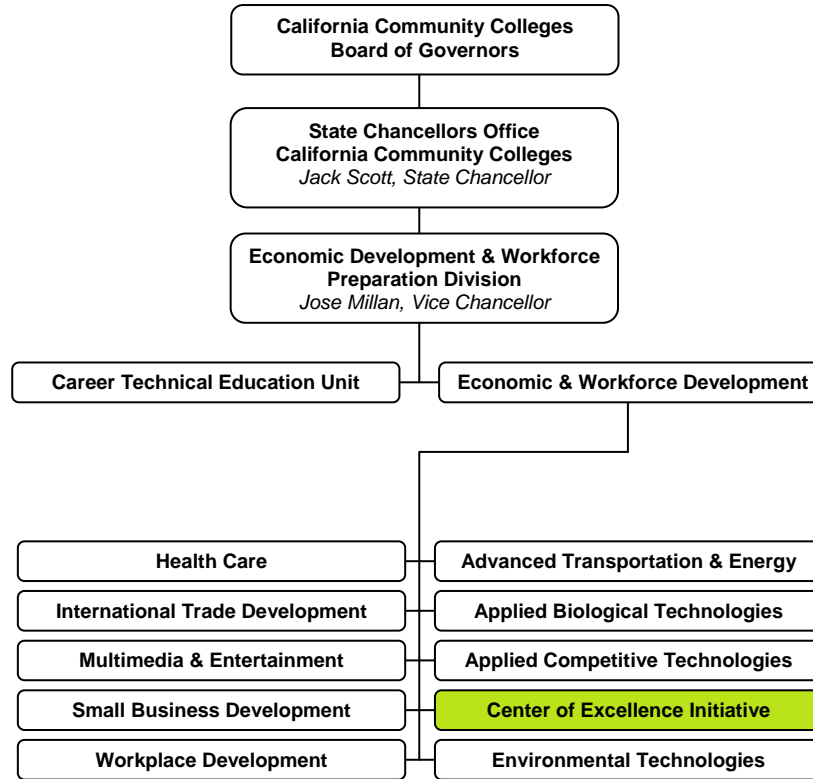
TECH
PLAN

BUDGETS

SELF-
STUDY

RECOM
MEND.

Organization Chart



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

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

GOALS

Progress Toward Goals (to be completed in June 2010)

2009-2011 Goals	Progress Rating 1 - 10 (10 = completed)	Comments

GOALS

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

Budget and Expenditures

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

BUDGETS

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



Small Business Development Center

Department

ORG. CHART

FUNCTIONS

GOALS

TECH
PLAN

BUDGETS

SELF-
STUDY

RECOM
MEND.



Portfolios for Planning

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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

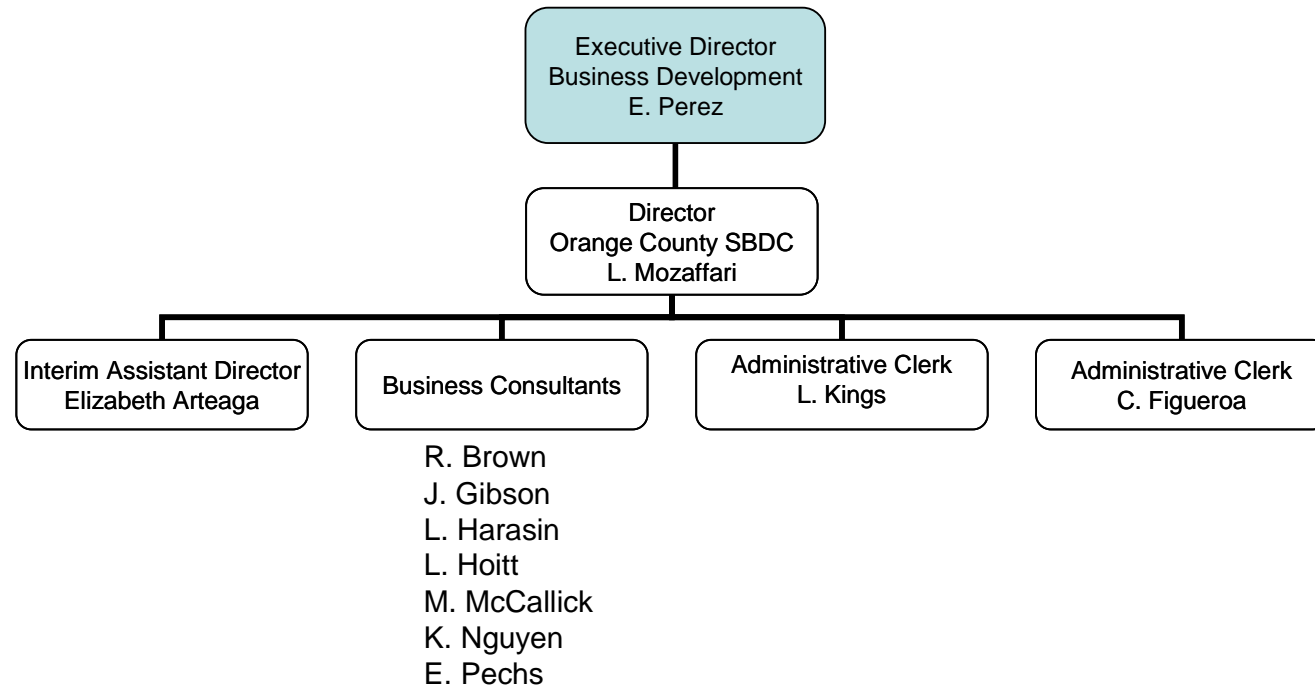
BUDGETS

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 (to be completed in June 2010)

2009-2011 Goals	Progress Rating 1 - 10 (10 = completed)	Comments
Extended Engagement Clients (5+ hrs contact time)		
Long Term clients (5+ hrs contact and prep time)		
total trainees		
Business start-ups		
Capital infusion		
Staff development		

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)

Department

ORG. CHART

FUNCTIONS

GOALS

TECH
PLAN

BUDGETS

SELF-
STUDY

RECOM
MEND.



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ORG. CHART

FUNCTIONS

GOALS

TECH
PLAN

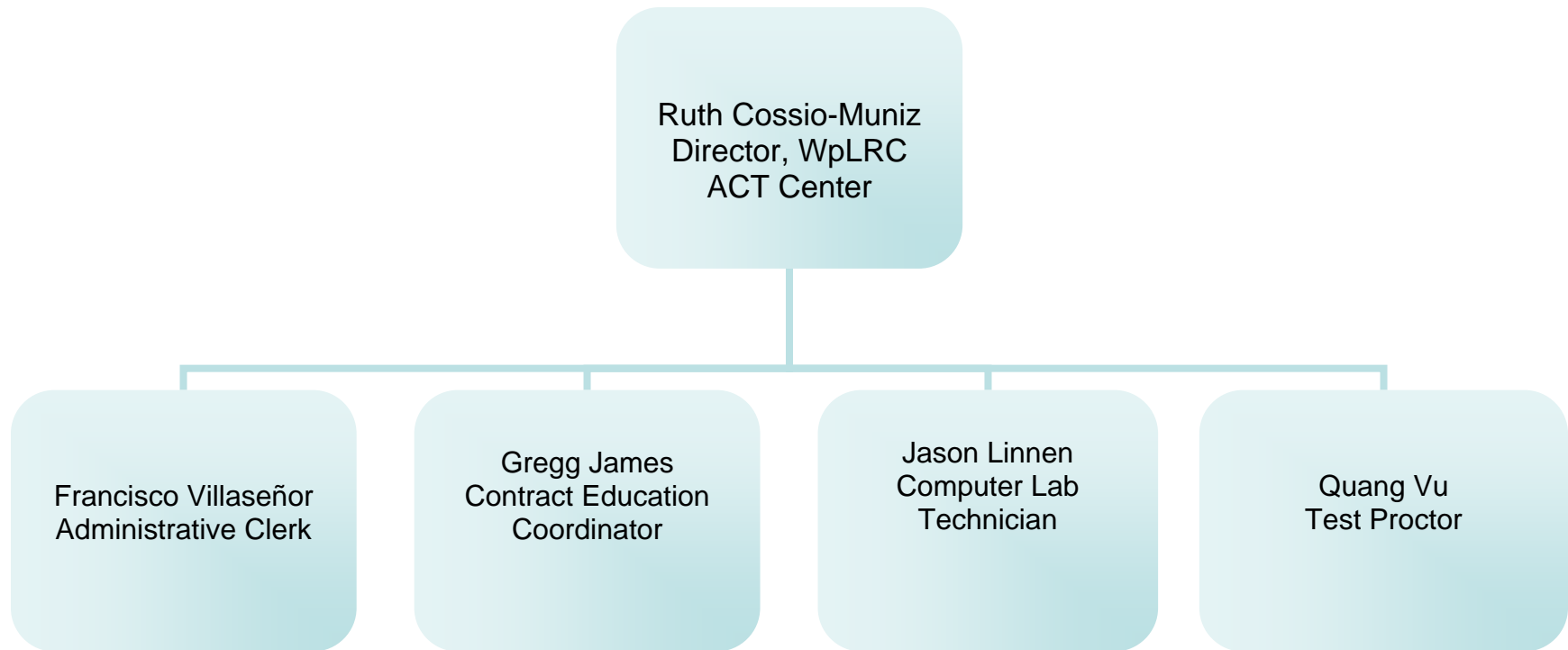
BUDGETS

SELF-
STUDY

RECOM
MEND.

Organization Chart

Rancho Santiago Community College District 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

Goals for years 2009-2011

GOAL	Responsible Person(s)	Completion Date	Resource Needs
1. Work with representatives of business, labor and professional trade organizations, and the colleges within the Center's geographic region to explore and develop new alternatives for assisting incumbent workers in order to increase competency, and identify career paths to economic self-sufficiency, and lifelong access to good paying jobs.	Director Contract Education Coordinator WpLRC Staff	July 09 - June 10	CCC Confer
2. Work with industry to determine targeted training needs.	Director Researcher	July 09 - June 10	Center of Excellence
3. Develop industry certification programs.	Director	July 09 - June 10	TBD
4. 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. 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

GOALS

<p>6. 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. 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. 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. 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. 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>

GOALS

Progress Toward Goals (to be completed in June 2010)

2009-2011 Goals	Progress Rating 1 - 10 (10 = completed)	Comments

GOALS

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
TOTAL						

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

2009-2011

Public Affairs/Governmental Relations
Department



ORG. CHART

FUNCTIONS

GOALS

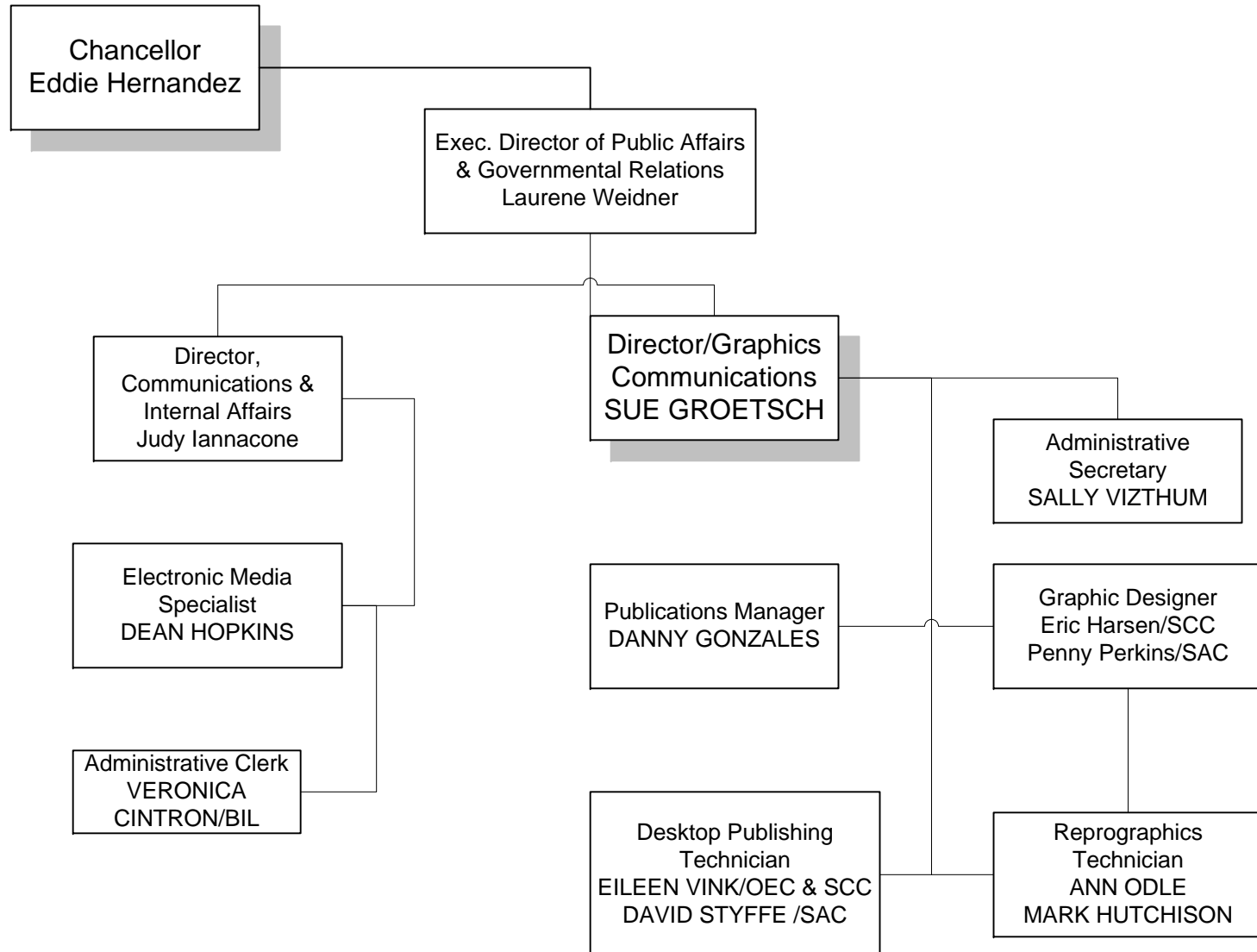
TECH
PLAN

BUDGETS

SELF-
STUDY

RECOM
MEND.

Rancho Santiago Community College District Public Affairs & Governmental Relations



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, working with district and campus leadership, to communicate accurate, timely and unified messages to support the college and district office brands.

- Develop and lead advocacy efforts with all levels of government to sustain and advance the mission of the college district.
- Provide public relations services to the district office programs and services, as well as the colleges.
- Develop and implement comprehensive community relations and employee communications efforts aimed at establishing open, two-way lines of communication with internal and external constituency groups.
- Organize, lead and implement public information efforts.
- 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.
- Develop the district and campus' crisis communications plans.
- Fulfill the PIO role as part of the command staff in the ICS structure for both the campuses and the district office.
- Represent the Chancellor and Board, when appropriate and when designated, to attend or present information to key constituents, elected officials, and other stakeholders.
- Develop and lead marketing communications efforts to sustain enrollment at campus and Continuing Education locations.
- Support brand identities, the communication of unified messages and graphic standards of excellence.

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 2009-2011

GOAL	Responsible Person(s)	Completion Date	Resource Needs
<p>Internal 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
<p>External 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.
Enhance public perception of the colleges and district using all existing channels of communication, as well as appropriate new technology.	Entire team, as well as Jason Kehler, sports information (SAC)	Year-long	Restoration of budget for advertising, marketing, printing, contracted services for writers and designers, and an investment in appropriate equipment including a camera and video camera for social media promotion.

GOALS

Build and sustain strategic relationships to advance organizational goals using traditional and online communications strategies.	Entire team	Year-long	Investment in technology and clerical support to aid relationship management.
Reinforce the college and district brands, underscoring program excellence, value, caring cultures, and high student success rates.	Entire team	Year-long	Restoration of budget. Department budget has been cut by 47%. Restore staff. Staff has been reduced by 50%.
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.
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.
Advocate that all employees grow through professional development.	Entire team	Year-long	Fund professional development. Staff currently pays for all of their own professional development. Restore budget to allow for the purchase of relevant subscriptions.

GOALS

2009-2011 Goals	Progress Rating 1 – 10 (10 = completed)	Comments
<p>Internal Support mission-focused communication with all employee groups to sustain a climate of open communication.</p>	4	<p>While PAGR is entrusted with employee communications, other divisions do not recognize the expertise and responsibilities of the department. This has created fragmentation in the communication of key issues and information. 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.</p>
<p>External Advocate the district’s legislative priorities to elected officials at all levels of government.</p>	6	<p>Despite the lack of clerical support and overall resources, PAGR continues to keep the district and its leaders visible with elected officials. Executive director is concerned about the pending advocacy visits to Sacramento and D.C., as the Board often defers to staff to carry discussions. How will follow up efforts occur without staff presence in these strategic meetings? The follow through activities are critical to the district’s reputation and the pursuit of legislative agenda items.</p>
<p>Enhance public perception of the colleges and district using all existing channels of communication, as well as appropriate new technology.</p>	4	<p>With only 3 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.</p>

GOALS

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.
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 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.
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. 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.	4	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.
Advocate that all employees grow through professional development.	1	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.

GOALS

Achievements

Strategic Initiatives

- Completed a comprehensive crisis communications plan.
- Completed a comprehensive communications and style guide to ensure the consistent branding of the colleges and district office programs and services.
- Completed a comprehensive community relations plan to expand the college district's visibility in Anaheim Hills, Garden Grove, and Villa Park.
- Significant support to the colleges and district in the production of the accreditation documents for the October 2008 accreditation visiting team.
- Completed a social media plan to guide the district and campus marketing efforts on Facebook, LinkedIn, My Space, and Twitter.
- Completed a strategic plan guiding internal and external communication for students involved in criminal activity.
- Completed a Board visibility plan to bolster the Board's visibility with employees and opinion leaders.
- Modified AR 1000 to reflect the scope of services and responsibilities of the department.
- Completed comprehensive communications plans to support open communication with employees, stakeholders, and opinion leaders pertaining to the state's emerging fiscal crisis and its implication for faculty, students, and the general public.

Fiscal Efficiencies

- Produced *Rancho Visions* and *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.
- Maximized available technology – at no cost the district – to sustain brand visibility for the colleges and district.
- Developed an affordable post-card mailing and devised new ways to produce the class schedule to reduce production and distribution costs, enabling the Graphic Communications/Publications to return more than \$90,000 to the General Fund ending balance in June 2009.
- Researched and negotiated the lease of new production equipment that is increasing production and saving expenses to the district.

Issues Monitoring and Communications

- Created and managed campus-wide communications efforts about smoke-free and tobacco free workplace policies, voter education, and student fee increases.
- 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.

GOALS

Governmental Relations

- Secured a federal earmark of \$235,620 for the SAC continuing education/nursing and EMT program in January 2009.
- Significant support and awareness generated through a nine-month long educational campaign with federal law makers and trade association advocacy leaders about the need for modifications to the Higher Education Act (cohort student default rate).
- Initiated, planned and staged strategic visits with state and federal law makers, including Assembly members Curt Hagman, Jeff Miller, and Mike Duvall and Senator Bob Huff.
- Earned two Gold Medals (in both the public relations and public affairs categories) for the Capitol Mascot Day event and media conference in the regional CASE award competition. (Event took place in spring 2008. Award was garnered in winter 2008. RSCCD led the letter-writing campaign that resulted in the delivery of more than 1,400 RSCCD letters to the Governor. RSCCD also led the media relations effort and press conference.)

Employee Communications

- Expanded the intranet to include vital information for employees. Developed a two-way communication forum to minimize rumors and communicate accurate information.
- Expanded communication around key issues from Alert U to the swine flu.
- Support to the Chancellor and college presidents with timely, well-written material for inclusion in eBlasts to employees on topics of interest and concern.

Media Relations

- Garnered 803 publicity placements in print, ethnic media, broadcast and online media. If this space and airtime had been purchased in equivalent advertising dollars, the district would have spent \$1,236,101 to buy this visibility! The number of people reached by these stories was 63,275,418.
- Secured feature stories on topics pertaining to campus and district office priorities.
- Managed media controversies to neutralize negative publicity.

Community Relations

- Sustained favorable relations with the three Chamber of Commerce supporting the district.
- Sustained favorable relations with Latino-organizations in the Santa Ana service area.
- 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, the Santa Ana Business Alliance and KinderCaminata.

GOALS

Campus Communication & Sports Information

- Produced of Tier 1-quality media guides for various supports.
- Devised and implemented effective online communication about athletics to the campus communities.
- Supported a wide range of on- and off-campus events and fund raisers with traditional and on-line communication.
- Expanded traditional and online communication efforts to employees.
- Expanded pro-active media relations of campus programs and services.

Crisis Communications

- Worked along side the college presidents and chancellor to implement the ICS structure.
- Developed scenario-based training for the department staff.
- Participated in required FEMA and ICS training.

Digital Communications

- Developed Facebook, Twitter, LinkedIn and MySpace presences for both campuses.
- Improved the layout and functionality of RBay – the online auction for the Chancellor's Ball. RBay raised more than \$2,000 toward student scholarships, as a result of increased participation and improved functionality.
- 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 and district.
- Created and implemented new Web sites or improved existing Web sites and features for a wide range of RSCCD programs from the Digital Media Center to the Orange County Young Entrepreneur Program.

Measure E

- Supported the staging of opening events for the soccer field, classroom building, M&O building at SAC.
- Supported the staging of the opening of the softball field at SCC.
- Supported the groundbreaking for the child development center at SAC.

GOALS

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.

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 social media applications.

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	
TOTAL	\$412,584*	TBD				
	* Reflects all line items . Not all are noted here.					

BUDGETS

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 a lean and efficient operation. We generate excellent results, given our small staff and continue to win regional and national awards for the quality of our work.

Resources are needed to conduct appropriate research – internally and externally – to tailor communication and channels of communication for maximum impact.

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.

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

Even as the team is 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. 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?

Steady progress continues on all goals, even as the team is down to three professionals and one support staff.

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

Strengths

Superb quality of work and excellent messaging.

Creativity despite limited resources.

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. All three team members are having health issues due to excessive stress. 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.

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

PAGR has earned two federal earmarks for SAC and supported the earning of a \$3 M Early Head Start grant for Educational Services. We can do more to help colleagues if they will involve us early in the process. Even so, PAGR has worked hard to write template letters of support and garner letters of support from elected officials at all levels of governmental, as well as appropriate opinion leaders and strategic partners. These letters support the grant applications, providing an invaluable endorsement. In addition, in order to secure support and endorsement, 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. PAGR also arranged for campus and DO office staff to take part in a private workshop by Congressman Ed Royce's staff. 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.

SELF-
STUDY

7. What are future trends 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 a 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.

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. Adding an additional communications practitioner is of a higher priority.

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.**

Rancho Santiago Community College District

District Operations Planning Portfolio

2009-2011



Graphic Communications and Publications Unit

Public Affairs/Governmental Relations Department

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

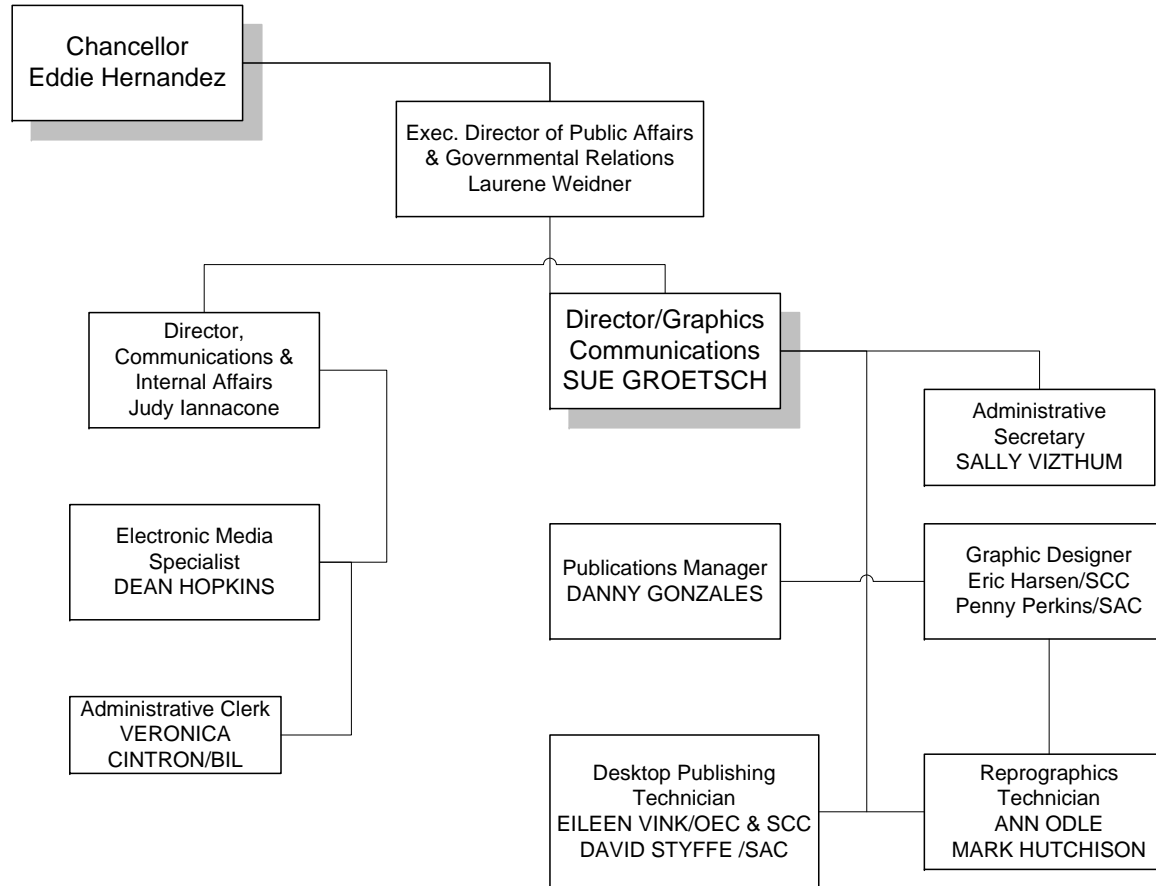
SELF-
STUDY

RECOM
MEND.

Organization Chart

* Red Circled 6/05

Rancho Santiago Community College District Public Affairs & Governmental Relations



09-22-09

ORG. CHART

Functions

Functions and services provided by the department: GRAPHIC COMMUNICATIONS

- Communicate college and district values in print and electronic media.
- Support brand identities and graphic standards of excellence.
- Graphic designers and desktop publishers are assigned to each college primarily to support college-initiated communications.
- They work with college employees, PIOs and other communications professionals within PAGR to produce a wide range of projects and applications.
- Each supports selected district-initiated requests.
- Particular effort is made to keep the college brand identities strong and maintain high standards of visual design in print and electronic media.

Functions and services provided by the department: PUBLICATIONS

- Provide print, bindery and photocopy materials to support instructional, marketing, public relations and other organizational communications goals.
- Consult with employees on publications provided by outside vendors.
- The Publications Department provides reprographic and offset print products to the colleges for academic, administrative operations, public relations and marketing purposes.
- Faculty and staff are encouraged to submit reprographic jobs through the Web submission system.

FUNCTIONS

Functions

Customers and recipients of services: GRAPHIC COMMUNICATIONS

- All functions and departments of the district are supported by the graphic communications team.
- Departments that require more intensive marketing efforts use the services the most and include: academic affairs, student outreach, fine & performing arts, athletics, college advancement and student affairs.

Customers and recipients of services: PUBLICATIONS

- All functions and departments of the district are supported by the publications team.
- Faculty and classified staff utilize the reprographics services most often in support of instruction and administration.
- Administrators are required to authorize print work that is charged back to their budget.

FUNCTIONS

Goals

GRAPHIC COMMUNICATIONS

1. Annual goals (including staff development goals) – created at beginning of each school year
 - Maintain service and productivity in the face of increasing demands and diminishing budgets.
 - Analyze customer needs to provide the best methods of communication with an emphasis on electronic methods and less expensive print methods.
 - Cross train staff to develop skill sets from within our ranks since staff development budgets are unavailable.
 - Train staff in using the Graphic Standards and Communication Style Guide after board approval.
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

GRAPHIC COMMUNICATIONS and PUBLICATIONS

GOAL	Responsible Person(s)	Completion Date	Resource Needs
Maintain service and productivity in the face of increasing demands and diminishing budgets.	All PAGR staff	ongoing	Maintenance of current equipment and software
Analyze customer needs to provide the best methods of communication with an emphasis on electronic methods and less expensive print methods.	All PAGR staff	September 2009 and ongoing	
Cross train staff to develop skill sets from within our ranks since staff development budgets are unavailable.	All PAGR staff	September 2009 and ongoing	
Implement training for Graphic Standards and Communication Style Guide	All PAGR staff	September 2009 and ongoing	

GOALS

Progress Toward Goals (to be completed in June 2010)

2009-2011 Goals	Progress Rating 1 – 10 (10 = completed)	Comments
Maintain service and productivity in the face of increasing demands and diminishing budgets.		
Analyze customer needs to provide the best methods of communication with an emphasis on electronic methods and less expensive print methods.		
Cross train staff to develop skill sets from within our ranks since staff development budgets are unavailable.		
Implement training for Graphic Standards and Communication Style Guide		

GOALS

Department Technology Plan

GRAPHIC COMMUNICATIONS and PUBLICATIONS

Include software, hardware, and training needs.

- Maintain software updates on publications equipment to ensure compliance with annual Xerox contracts
- Provide means to utilize accumulated chargeback funds to purchase critically needed hardware or repair service in the event of an equipment breakdown.
- Maintain a minimum standard of graphic software file preparation software that keeps pace with print industry standards for jobs that must be outsourced.

TECH
PLAN

Budget and Expenditures

Graphic Communications (52600) and Publications (52500) Combined

Object Code	2009-2010		2010-2011		2011-2012	
	Budgeted	Expended	Budgeted	Expended	Budgeted	Expended
677000-52600-4210	106	106	106		106	
677000-52500-4310	8694	8694	8694		8694	
677000-52500-4520	9000	9000	5,000		5,000	
677000-52600-4520	257	257	0		0	
677000-52500-4610	74,106	74,106	54,106		54,106	
677000-52600-4610	6,161	4,161	4,161		4,161	
677000-52600-5220	191	0	0		0	
677000-52500-5220	100	0	0		0	
677000-52600-5815	200,000	200,000	0		0	
677000-52500-5660	15,000	11,000	11,000		11,000	
677000-52500-5610	234,905	234,905	234,905		234,905	
TOTAL	\$601,822	TBD				
	* Reflects all line items not all are noted here					

BUDGETS

Self-Study

GRAPHIC COMMUNICATIONS and PUBLICATIONS

Self-study standard questions:

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

Managers and staff maintain strong lines of communication on projects as they develop to completion. Occasional survey instruments are used to measure satisfaction and are planned for the start of the Fall 2009 semester.

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

Print services are similar to other similarly sized districts except that other districts charge back for the majority of the work they do. Staffing levels are adequate in comparison to similar districts. Graphic design and desktop publishing services are also similar in quality and scope. There are no limits to the creativity employed by the graphic designers and their services exceed in quality compared to similar districts.

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

The services of these two functions are limited by the hardware and software utilized. Staff make every effort to maximize the output from the equipment provided.

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

Reprographics equipment was upgraded last year and distribution methods to the colleges have been continually improved.

A graphic standards manual has been developed and is in the process of finalization. College and district logos were refined for optimized rendering and are being used to upgrade materials as they are developed.

SELF-
STUDY

Self-Study

GRAPHIC COMMUNICATIONS and PUBLICATIONS

Self-study standard questions:

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

Strengths

Staff are seasoned professionals who are capable and efficient

Recent reprographic equipment upgrades provide opportunities for growth in the production of black and white copies.

Weaknesses

Lack of color print capabilities

Inability to properly utilize chargeback funds collected

Failure to meet the emerging needs of color long print run lengths

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

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

Heavily dependent on technology without an ability to respond to customer needs with current technology applications. Future trends include:

- more demand for instructional use of color
- more demand for variable data printing that customizes and personalizes communication to students, donors, community leaders and partners
- more on-demand printing of targeted marketing pieces

SELF-
STUDY

Recommendations

GRAPHIC COMMUNICATIONS and PUBLICATIONS

- Implement a full chargeback system for print services
- Fully staff the administrative support for the implementation of a chargeback system
- Maintain adequate graphic design support for the colleges
- Fully integrate graphic standards into the culture of the district and colleges to maintain brand identities
- Maximize the equipment and expertise in Publications by entering into early lease agreements that save money and maximize productivity with improved machinery and features
- Expand the Publications staff to run an evening shift to allow all large projects to be produced on the most sophisticated and cost-efficient machinery in the district
- Initiate policies that drive as much work as possible to the Publications Unit to allow limited support staff districtwide to spend less time preparing projects from the Xerox machines found on the campuses and at the district office
- Initiate a policy requiring users to move to an online work submission process, whenever possible for job tracking and efficiency purposes.

RECOM
MEND.