

Rancho Santiago Community College District 2012 Planning Design Manual

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RSCCD Mission Statement

The mission of the Rancho Santiago Community College District is to provide quality educational programs and services that address the needs of our diverse students and communities.

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Introduction

The *Rancho Santiago Community College District 2012 Planning Design Manual* is a guide to integrated institutional planning at the district level. The planning processes were developed to ensure broad participation in district-level planning and to ensure compliance with the Accrediting Commission for Community and Junior Colleges Standards on institutional planning.

The processes described in this document identify the ways that constituent groups participate in and contribute to district-level long-term and short-term planning. This document begins with a description of the Rancho Santiago Community College District (RSCCD) Planning Design. Following that overview is a description of the purpose, process, and timeline for each component in the Planning Design as well as the citation of the Accrediting Commission for Community and Junior Colleges Standard relevant to that component.

Both of the RSCCD entities, Santa Ana College and Santiago Canyon College, have independent cycles of integrated planning in which the components are linked to one another as well as to district-level planning. The college planning processes link to district planning in two ways:

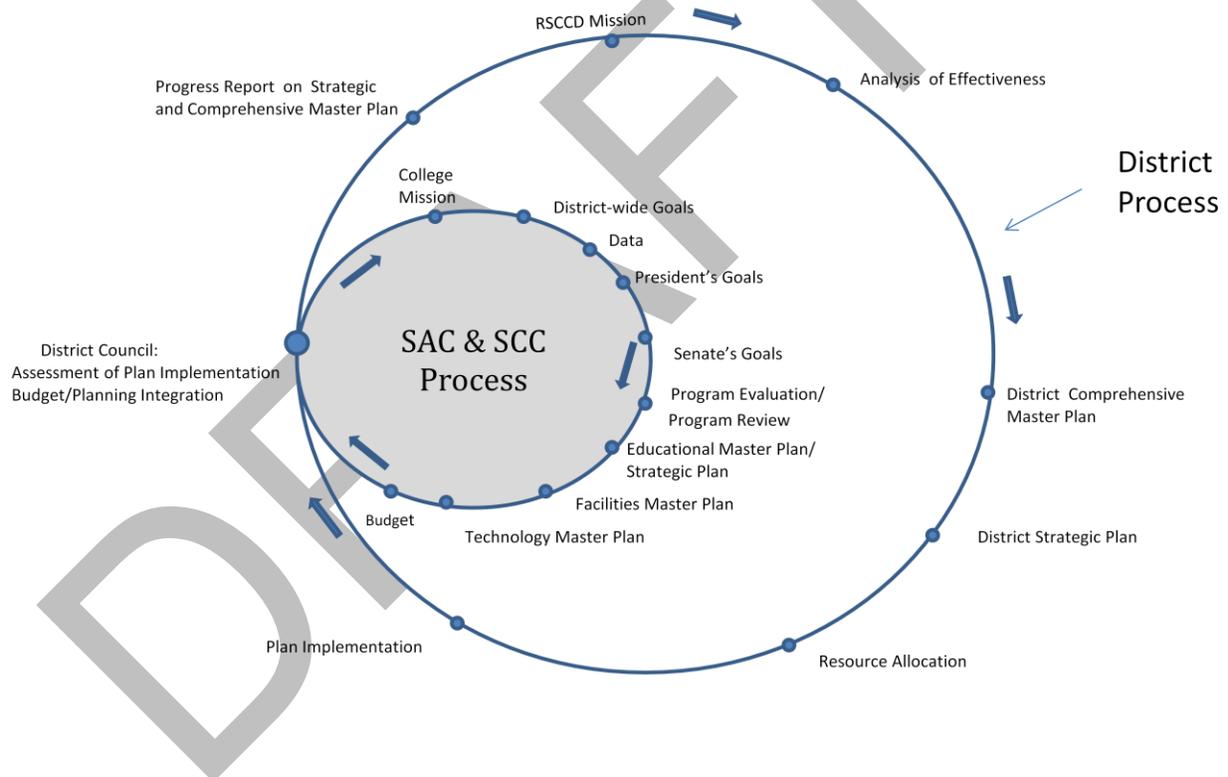
- The RSCCD Goals are foundational to planning at the two colleges. Each college develops site-specific goals, objectives, and action plans that collectively contribute to the achievement of the RSCCD Goals.
- The annual Progress Report details progress on RSCCD and RSCCD Objectives as well as the colleges' goals and objectives.

The *Rancho Santiago Community College District 2012 Planning Design Manual* is reviewed and updated annually to maintain credibility as a valuable resource. The annual update prepared by the Executive Vice Chancellor reflects minor changes, such as in descriptions, timelines, or processes. In addition to this annual review of content, the planning processes described in this document are evaluated every three years. This assessment occurs as part of RSCCD's assessment of its decision-making processes. This timeline and assessment process is described in the "Assessment of Planning and Decision-Making Processes" section of this document. Through these two review processes, one completed on an annual basis and one completed every three years, this document is maintained to reflect the inevitable changes in planning processes that are to be expected as part of RSCCD's cycle of continuous quality improvement.

Overview of the Planning Design

The Planning Design depicts how the components of district-level planning link to one another in a cycle of evaluation, development of goals and objectives, resource allocation, plan implementation, and re-evaluation. The district demonstrates institutional effectiveness and practices a cycle of continuous quality improvement through the systematic and routine implementation the following planning processes. In this graphic and throughout this document, RSCCD refers to the entire district as collectively as an institution, encompassing the two colleges and District Services. Following the graphic is a narrative explanation of the district-level planning processes.

RSCCD Planning Design



- The **RSCCD Mission Statement** is the foundation of all planning processes because it describes the intended student population and the services that RSCCD provides to the community.



- In its **Analysis of Effectiveness**, the district compares its current status to the RSCCD Mission Statement (internal scans) and studies projected demographics changes in order to identify challenges and opportunities (external scans).



- Based on the analysis of its effectiveness, the district develops a long-term **RSCCD Comprehensive Master Plan**. This plan includes summaries of the educational and facilities master plans developed by the two colleges as well as district-wide data. Through the process of developing this comprehensive master plan, the district collaboratively develops RSCCD Goals to describe how it intends to address the identified current and anticipated challenges. As depicted in the Planning Design, these RSCCD Goals are part of the foundation for planning at the two colleges.



- The RSCCD Goals are also used to develop RSCCD Objectives presented in the **RSCCD Strategic Plan**. RSCCD Objectives describe specific initiatives that will be undertaken to achieve the RSCCD Goals that require the collaboration and coordination of administrators, faculty, and staff across the district. In addition to the RSCCD Objectives, each site also develops initiatives that contribute to the achievement of RSCCD Goals. These initiatives are documented in the colleges' strategic plans and in the District Services Planning Portfolios.



- All resources coming into the district are dispersed to the colleges and centralized services based on formulas that mirror the statewide allocation formulas defined in Senate Bill 361. Following that allocation, each college and district service uses independent processes for **Resource Allocation** to ensure that the initiatives identified in their respective plans are appropriately funded to the extent possible.



- The next step in the Planning Design is **Plan Implementation**, which refers to work by the responsible parties to complete the RSCCD Objectives outlined in the RSCCD Strategic Plan.



- An **Assessment of Plan Implementation** occurs annually through the documentation and analysis of progress made toward achieving the RSCCD Goals at both the district and college levels.



- The assessment of plan implementation is consolidated and documented in an annual **Progress Report on the RSCCD Comprehensive Master Plan**. This document both summarizes the current year's achievements and informs the district's planning efforts in the coming year.

The components of the Planning Design summarized in this overview and described in this manual are evaluated on a three-year cycle along with the evaluation of the collaborative decision-making processes at the district level.

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RSCCD Mission Statement

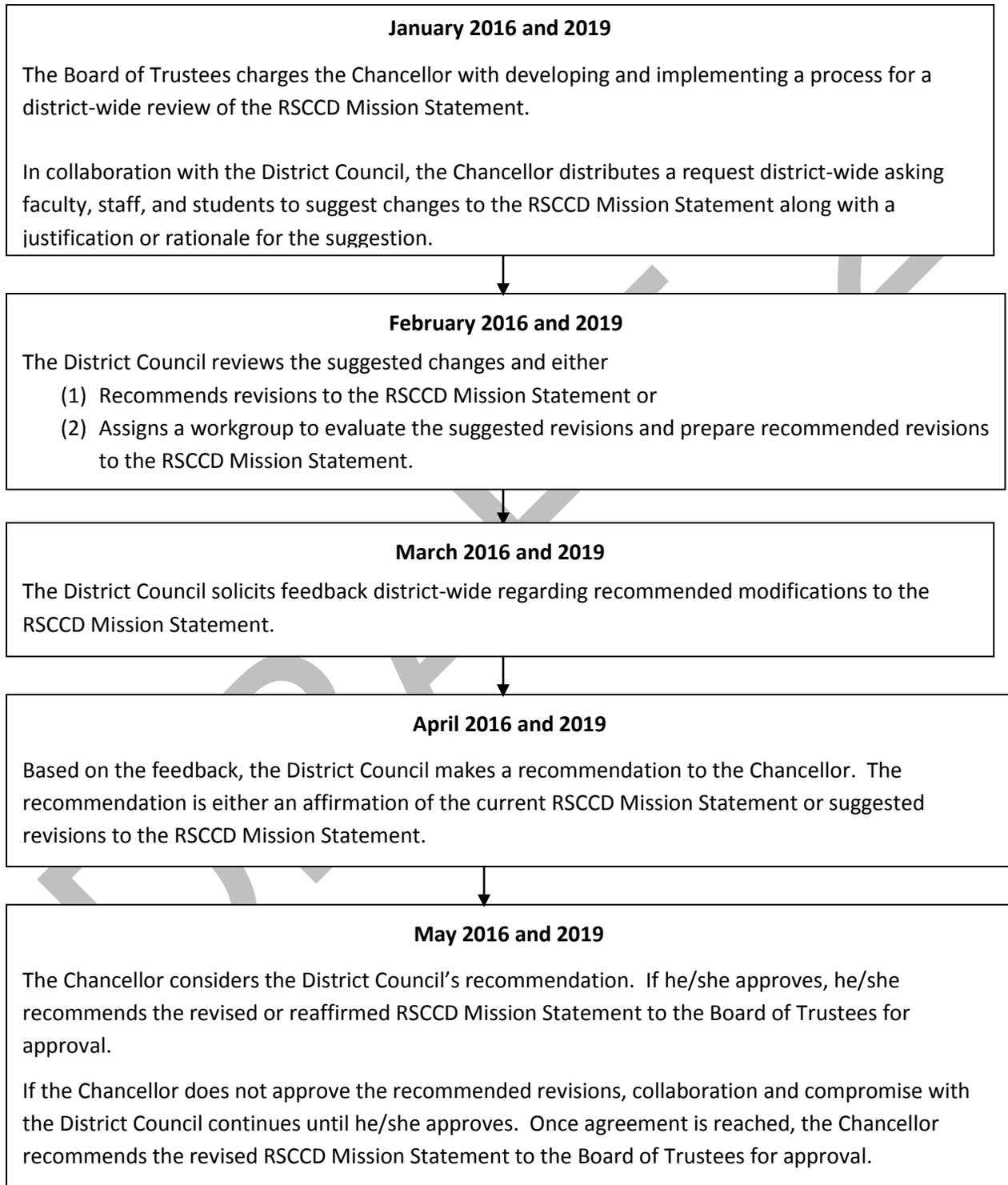
The RSCCD Mission Statement is the touchstone for planning processes across the district because it describes the intended student population and the services that RSCCD provides to the community (Standard I.A.)

RSCCD established its first district-wide mission statement in fall 2012.

The mission of the Rancho Santiago Community College District is to provide quality educational programs and services that address the needs of our diverse students and communities.

The cycle for reviewing and possibly revising the district-wide mission statement is every three years.

Process for Reviewing the Mission Statement



RSCCD Comprehensive Master Plan

The RSCCD Comprehensive Master Plan is a long-term plan that describes the district's projections and goals for the coming decade. (Standard I.B.1., Standard I.B.2.)

The process for developing the RSCCD Comprehensive Master Plan begins with an analysis of current internal and external conditions. These data are the foundation for assessing RSCCD's effectiveness in advancing its mission and for identifying anticipated challenges. These conversations culminate in:

- The identification of challenges that RSCCD is facing or is likely to face in the coming decade;
- RSCCD Goals that articulate how the district intends to address current and anticipated challenges; and
- A plan for the addition or remodeling of facilities and technology infrastructure to support RSCCD's programs and services.

The RSCCD Comprehensive Master Plan is linked to its mission statement because an assessment of the district's effectiveness in meeting its mission is the first step in the planning process. The RSCCD Comprehensive Master Plan is central to the overall Planning Design because the RSCCD Goals included in this long-term plan are the basis for the RSCCD Objectives in the RSCCD Strategic Plan.

The RSCCD Goals are collaboratively developed and reviewed through district-wide dialogue. Following this review and dialogue, the District Council recommends the RSCCD Goals to the Chancellor and the Board of Trustees for approval.

The *Rancho Santiago Community College District 2013 Comprehensive Master Plan* is the district's current long-term plan. It was developed during the 2012-13 academic year and presented to the Chancellor and the Board of Trustees for approval in May 2013. This plan includes the identification of current and anticipated challenges, RSCCD Goals; summaries of the colleges' educational and facilities master plans; the technology plan for centralized technology needs; and plans for off-site college and district facilities.

Process for Developing the RSCCD Comprehensive Master Plan

May 2021

The Planning and Organizational Effectiveness Committee calls for the development of the *Rancho Santiago Community College District 2023 Comprehensive Master Plan* and develops both a process for preparing the RSCCD Comprehensive Master Plan, an outline of what should be included in this plan, and a process that will include all district constituencies.



September 2021 – March 2022

The RSCCD Comprehensive Master Plan is drafted following the process developed by the Planning and Organizational Effectiveness Committee. The first step in the process is an analysis of current internal and external conditions to assess RSCCD's effectiveness in advancing its mission.

To promote broad district-wide participation, the Planning and Organizational Effectiveness Committee distributes drafts of the document district-wide for review and comment at multiple points during this period.

Feedback from these district-wide reviews is integrated into the document to create a final draft of the RSCCD Comprehensive Master Plan. The final draft is forwarded to the District Council for final recommendations.



April - May 2022

Members of the District Council distribute the final draft of the RSCCD Comprehensive Master Plan to their constituents for review and comment. Once feedback is received and integrated into the draft as appropriate, the District Council makes a recommendation to the Chancellor.

The Chancellor considers the District Council's recommendation. If he/she approves, he/she recommends the *Rancho Santiago Community College District 2023 Comprehensive Master Plan* to the Board of Trustees for approval.

If the Chancellor does not approve of the *Rancho Santiago Community College District 2023 Comprehensive Master Plan*, collaboration and compromise with the District Council continues until he/she approves.

Once agreement is reached, the Chancellor recommends the *Rancho Santiago Community College District 2023 Comprehensive Master Plan* to the Board of Trustees for approval.

RSCCD Strategic Plan

The strategic plan is the district's short-term plan. This plan uses the RSCCD Goals as the basis for developing RSCCD Objectives that describe how the RSCCD Goals will be achieved. (Standard I.B.1., Standard I.B.2., Standard I.B.4.)

The RSCCD Objectives describe the specific initiatives that will be undertaken to achieve the RSCCD Goals that require collaboration and coordination among District Services and college administrators, faculty, and staff. The initiatives to be undertaken at each site that contribute to the achievement of the RSCCD Goals are documented in college planning documents and in the District Services Planning Portfolios.

Since the term of the RSCCD Strategic Plan is three years, there will be three RSCCD Strategic Plans developed under the umbrella of the *Rancho Santiago Community College District 2013 Comprehensive Master Plan*:

RSCCD Strategic Plan 2013 – 2016

RSCCD Strategic Plan 2016 – 2019

RSCCD Strategic Plan 2019 – 2022

The primary components of the *RSCCD Strategic Plan 2013- 2016* are described below.

- **RSCCD Goals** are broad statements that articulate how RSCCD intends to address current and anticipated challenges.
- **RSCCD Objectives** describe more specifically those initiatives that will be undertaken to achieve the RSCCD Goals that require collaboration and coordination among District Services and college administrators, faculty and staff.
- **Responsible Party** identifies the individual(s) assigned to launch, oversee, and complete the RSCCD Objectives. The responsible individual(s) may complete the RSCCD Objective or may collaborate with others to complete the RSCCD Objective. The assignment of a responsible party is essential for accountability.
- **Timeline** identifies the target date for the completion of the RSCCD Objective.

Process for Developing the RSCCD Strategic Plan

February 2013, 2016, 2019

The District Council appoints a RSCCD Strategic Plan Workgroup to prepare the *RSCCD Strategic Plan 2013 – 2016 (or 2016 – 2019 or 2019 - 2022)*.



March 2013, 2016, 2019

The RSCCD Strategic Plan Workgroup reviews the RSCCD Goals in the *Rancho Santiago Community College District 2013 Comprehensive Master Plan* and progress on the RSCCD Objectives in the most recent *Progress Reports*. Based on this review, the RSCCD Strategic Plan Workgroup develops RSCCD Objectives and the corresponding Responsible Parties and Timelines for the next three years.



April 2013, 2016, 2019

The RSCCD Strategic Plan Workgroup distributes the draft *RSCCD Strategic Plan 2013 – 2016 (or 2016 – 2019 or 2019 - 2022)* across the district for review and input.

The RSCCD Strategic Plan Workgroup uses the feedback from this district-wide review to prepare the final *Rancho Santiago Community College District-wide Strategic Plan 2013 – 2016 (or 2016 – 2019 or 2019 - 2022)* and forwards the final draft to the District Council.

Members of District Council distribute the final draft of the *Rancho Santiago Community College District-wide Strategic Plan 2013 – 2016 (or 2016 – 2019 or 2019 - 2022)* to their constituents for review and input.

The District Council considers the constituents' recommendations, integrates feedback as warranted, and makes a recommendation to the Chancellor.

If the Chancellor approves of the final document, the *RSC10/30/12 Strategic Plan 2013 – 2016 (or 2016 – 2019 or 2019 - 2022)* is presented to the Board of Trustees. If the Chancellor does not approve, collaboration and compromise continues until he/she approves.

The *RSCCD Strategic Plan 2013 – 2016 (or 2016 – 2019 or 2019 - 2022)* is implemented beginning in the subsequent fall semester.

Resource Allocation

Resource allocations align with the RSCCD Mission Statement and link RSCCD Goals and RSCCD Objectives to the resources needed to accomplish these institutional goals. (Standard I.B.3., Standard I.B.4., Standard III.D.3.)

Generally speaking, the goals and objectives at both district and college levels reflect the district's commitment to its mission. Therefore, the purpose of resource allocations is to fund the programs and services that both directly and indirectly promote student success.

The budget development process begins with the development of budget assumptions. The budget assumptions are central to the budget development process and guide the allocation of resources. Information from a variety of sources is considered in the development of the budget assumptions, including but not limited to:

- RSCCD Goals and RSCCD Objectives;
- Priorities identified by the District's participatory governance committees that have been vetted and approved by the District Council;
- A review of the effectiveness of the prior year's resource allocations;
- Maintenance of appropriate reserves for contingencies and economic uncertainties;
- Mandates from external agencies; and
- Plans for payment of liabilities and future obligations, such as retiree health benefits, STRS, and PERS.

Budget assumptions are categorized into the following three types: general, revenue, and expenditure. General assumptions describe broad agreements, such as the resource allocation model and the level of the reserve. Revenue assumptions summarize the current status of anticipated revenue, such as cost-of-living adjustments and state apportionment. Expenditure assumptions provide projected costs of contractual agreements and required budget reductions if any.

RSCCD's three budget centers are Santa Ana College, Santiago Canyon College, and District Services. These entities have the autonomy and responsibility to provide appropriate programs and services that support achievement of the RSCCD Goals and RSCCD Objectives as well as their respective institutional goals, objectives, and initiatives.

The district's resource allocation model is patterned after the community college funding protocols established in SB 361. Revenue is allocated to the colleges based upon these

parameters except for an allocation to support centralized services. Any proposed changes to the allocation for district-wide services is reviewed by the Fiscal Resources Committee and recommended to the District Council and Chancellor.

Beyond the expenditures determined through district-wide collaboration, each budget center develops individual budgets for expenditures from general fund and categorical revenue in the following categories:

- Salaries and benefits as determined by union contracts;
- Supplies and materials;
- Services and other operating expenses, such as travel;
- Capital outlay, such as equipment; and
- Maintenance.

The colleges are responsible for ensuring that plans, planning documents, and planning processes are the basis for resource allocations in their budgets. Since the RSCCD Goals are foundational for college-level planning, it is the college resource allocation processes that provide the most direct link between RSCCD Goals and allocation of resources needed to achieve those goals.

District Services is also responsible for ensuring that any requests for funded forwarded through the District Services Planning Portfolio are justified by the RSCCD Goals.

For funding requests forwarded to the District Council by one of the five district-level committees, District Council is responsible for ensuring that resources are allocated to contribute to the achievement of RSCCD Goals and RSCCD Objectives. To make this link between planning and resource allocation transparent, District Council uses a rubric to prioritize each funding request based on the extent to which it is aligned with current RSCCD Goals and RSCCD Objectives and/or is justified by health or safety concerns.

To provide the opportunity for Board oversight of the RSCCD Goals, when the tentative budget is presented to the Board each June, the presentation includes links between the resource allocations and RSCCD Goals where appropriate.

Process for Allocating Resources

January

Board of Trustees and District Council review the Governor's proposed state budget.

Fiscal Resources Committee draft general and revenue budget assumptions and forward these to the District Council for review and input.

Through the spring the Fiscal Resources Committee monitors changes in the forecasts for state allocations and revises the general and revenue budget assumptions as warranted. Any changes are submitted to the District Council for review and input.



February

Board of Trustees' annual planning meeting includes a review and discussion of progress toward achieving RSCCD Goals, data on the 12 measures of success, and other assessments.



March - April

Budget Centers receive tentative allocations for the coming fiscal year based on the budget allocation model and develop a tentative budget for that site.



April

Using the sources of information described in the narrative for Resource Allocations, the five district committees (Planning and Organizational Effectiveness Committee, Fiscal Resources Committee, Human Resources Committee, Physical Resources Committee, and Technology Advisory Group) provide draft expenditure assumptions and specific recommendations for resource allocations to District Council for consideration during development of the tentative . . .



May

The Co-chairs of the Fiscal Resources Committee revise the draft tentative budget and the revenue budget assumptions as needed based on changes to the proposed state budget and submit the revised tentative budget to District Council. District Council revises the tentative budget as needed following their review of (i) the Governor's changes to the proposed state budget, (ii) revisions to the revenue budget assumptions if any, and (iii) the draft expenditure budget assumptions and recommendations for resource allocations.



June

The tentative budget is presented to the Board of Trustees for approval. The presentation includes links between the resource allocations and RSCCD Goals where appropriate.



July-August

Throughout the summer, District Council reviews changes that impact the tentative budget and recommends revisions to the proposed budget as warranted.

September

The Vice Chancellor of Business Operations and Fiscal Services prepares the final budget as directed by District Council.

Final budget is presented to the Board of Trustees for approval.

Plan Implementation

Through the development of the RSCCD Strategic Plan, an individual is assigned responsibility for completing or overseeing the completion of each RSCCD Objective. This responsible party may complete the RSCCD Objective or may collaborate with others to complete the RSCCD Objective.

To ensure implementation of the identified activities that will move RSCCD toward accomplishment of the RSCCD Goals, responsible parties shall:

- Manage the timelines for the District Objective(s);
- Develop appropriate processes to complete the RSCCD Objective(s);
- Identify and address funding needs by submitting the request and rationale to the Planning and Organizational Effectiveness Committee;
- Provide data and other types of evidence to assess the levels of success following plan implementation; and
- Document the activities and outcomes to contribute to the preparation of the annual *Progress Report on the District Comprehensive Master Plan*.

Given that the timelines and processes for plan implementation will differ for each RSCCD Objective, there is not a single process and timeline that would describe the steps leading to completion of the RSCCD Objectives.

Assessment of Progress on the Comprehensive Master Plan and District Strategic Plan

A progress report is produced annually to inform the internal community about movement toward achievement of the RSCCD Goals. The *Progress Report on the District Comprehensive Master Plan* is an essential accountability tool in the RSCCD Planning Design because it reinforces and sustains a district-wide dialogue on its long-term and short-term goals. (Standard I.B.1., Standard I.B.4., Standard I.B.5.)

Three tasks will be accomplished through the development of this progress report:

- Consolidate information about the tasks that have been completed by all RSCCD entities related to RSCCD Goals;
- Analyze those outcomes in terms of their effectiveness in moving RSCCD toward achievement of the RSCCD Goals; and
- Edit or augment RSCCD Objectives for the coming year as needed based on the outcomes of the current year's work.

The *Progress Report on the District Comprehensive Master Plan* is prepared each fall to describe the prior year's activities related to the RSCCD Goals. This document is a key assessment tool in spring planning meetings including the Board of Trustees' February planning retreat.

Process for Assessing Progress on RSCCD Goals

April

The Planning and Organizational Effectiveness Committee develop or revise the template for the annual *Progress Report on the RSCCD Comprehensive Master Plan*.



May

The Planning and Organizational Effectiveness Committee calls for:

- Responsible parties identified in the RSCCD Strategic Plan to report on their progress in completing the RSCCD Objectives assigned to them and
- Colleges to report and evaluate the outcomes of activities undertaken to contribute to achievement of the RSCCD Goals.



June

The reports are consolidated by the Co-chairs of the Planning and Organizational Effectiveness Committee to create a draft *Progress Report on the RSCCD Comprehensive Master Plan* that includes the reports of progress as well as an analysis of the effectiveness of the activities in fulfilling the RSCCD Goals.

The Planning and Organizational Effectiveness Committee reviews the draft *Progress Report on the RSCCD Comprehensive Master Plan* and provides input. The Co-chairs of the Planning and Organizational Effectiveness Committee revise the document as warranted based on the input.



July - August

The Co-chairs of the Planning and Organizational Effectiveness Committee present the draft Progress Report to District Council for review and input. Suggested changes are incorporated as warranted to finalize the document.

The Chancellor presents the final *Progress Report on the RSCCD Comprehensive Master Plan* to the Board of Trustees for information.

The annual *Progress Report on the RSCCD Comprehensive Master Plan* is distributed as appropriate to both internal and external constituencies online and/or in print.

Assessment of Planning and Decision-Making Processes

RSCCD routinely assesses its planning and decision-making processes and makes revisions in these processes in a cycle of continuous quality improvement. (Standard I.B.6., Standard IV.A.5.)

A formal assessment of planning and decision-making processes is conducted every three years. The assessment includes gathering district-wide input and using that feedback to prepare an assessment report that is submitted to the District Council. District Council reviews the assessment report and recommends revisions to planning and/or decision-making processes as warranted by the assessment. The Chancellor considers the recommendation and approved changes are documented with revisions to the *Rancho Santiago Community College District 2012 Planning Design Manual*.

In addition to this formal assessment, the current version of the *Rancho Santiago Community College District Planning Design Manual* is reviewed and updated annually by the Co-chairs of the Planning and Organizational Effectiveness Committee to capture minor changes, such as in descriptions, timelines, or processes.

Process for Assessing Planning and Decision-making Processes

September 2015 and 2018

District Council convenes a Planning and Decision-Making Processes Workgroup.

The Planning and Decision-Making Processes Workgroup develops a mechanism for soliciting feedback on the components of the district-level planning design and decision-making processes from the groups and individuals who are directly involved in implementing planning and decision-making. The workgroup presents this process to District Council.



October 2015 and 2018

Feedback from District Council about the process for soliciting feedback is incorporated into the process and the Planning and Decision-Making Processes Workgroup implements the process.



November – December 2015 and 2018

The Planning and Decision-Making Processes Workgroup considers the feedback from the groups and individuals who are directly involved in implementing planning and decision-making processes and prepares a Planning and Decision-making Processes Assessment Report. This Report may include recommended changes to the planning and/or decision-making processes.

The Planning and Decision-Making Process Workgroup forwards the Planning and Decision-making Processes Assessment Report to District Council for review and input.

The Planning and Decision-Making Process Workgroup incorporates the feedback as warranted and forwards the Planning and Decision-making Processes Assessment Report to the Chancellor.



February 2016 and 2019

The Chancellor reviews the Planning and Decision-making Processes Assessment Report with District Council and determines which changes, if any, will be made to planning and/or decision-making processes.

The Chancellor prepares an information report on this assessment and the resulting changes to planning and/or decision-making processes, if any, for the Board of Trustees. This report is also distributed district-wide.

The Co-chairs of the Planning and Organizational Effectiveness Committee prepare an updated version of the *Rancho Santiago Community College District Planning Design Manual* to incorporate any approved changes to the planning processes.

Appendix 1: District Services Planning Portfolio

The District Services Planning Portfolio is the program review process for centralized services. The purpose of this process is to analyze and track the efforts of each District Service to continually improve the quality of the services provided to the colleges and to other District Services. (Standard I.B.5., Standard III.A.6., Standard III.B.2.b., Standard III.C.2., Standard III.D.3.)

District Services Planning Portfolios are designed to serve these purposes:

- Document the unique service initiatives for each District Service;
- Align and document strategies for achieving RSCCD Goals and RSCCD Objectives;
- Collect and analyze data on District Services performance;
- Provide an objective foundation for budget, staff, facilities, professional development, and other funding requests; and
- Demonstrate compliance with accreditation standards.

District Services Planning Portfolios are prepared every other year. To provide data for the analysis required by these planning portfolios, a satisfaction survey is distributed district-wide every other year requesting feedback on District Services. In the year between the preparations of comprehensive District Services Planning Portfolios, each District Service prepares an update of progress on the service initiatives undertaken to correct a weakness or work toward achievement of a RSCCD Goal or RSCCD Objective. Both the comprehensive District Services Planning Portfolios and the annual updates of progress are submitted to the Planning and Organizational Effectiveness Committee for their review and input.

This program review process is designed to lead to continuous quality improvement and therefore includes a cycle of data collection, analysis of strengths and weaknesses, development and implementation of strategies to remedy weaknesses, and re-evaluation. The steps are:

1. Describe the services provided by the District Service
 - Organizational Chart
 - Functions
 - Budget, including grants

2. Analysis of quantitative and qualitative data that reflect the services' strengths and

weaknesses

- Outcome of prior year's service initiatives
 - Results of the most recent satisfaction survey
 - Data recorded by the District Service, such snapshots of time to complete tasks, etc.
3. Develop Service Initiatives for the coming year to (a) sustain or improve the services provided, (b) address a weakness identified through the data analysis, and (c) contribute to the achievement of RSCCD Goals and RSCCD Objectives.
 4. Implement the Services Initiatives.
 5. Assess the impact of the strategies.

The final step of assessment is the starting point for the development of next year's District Services Administrative Review.

The District Services that complete a planning portfolio every other year are:

- Auxiliary Services
- Chancellor's Office
- Child Development Services
- Economic/Workforce Development
- Facilities Planning Services
- Fiscal Services
- Human Resources/Risk Management
- Information Technology Services
- Public Affairs/Publications
- Research
- Resource Development
- Safety

Resources are allocated to District Services through the district's resource allocation model that is patterned after the community college funding protocols established in SB 361. Revenue is allocated to the colleges based on these parameters included in SB 361 except for an allocation to support centralized services.

There are two processes for changes to the allocation for District Services.

- Proposed changes to the proportion of the revenue allocated for District Services is reviewed by the Fiscal Resources Committee and recommended to the District Council and Chancellor.

- Specific revenue requests related to a Service Initiative presented in a District Services Planning Portfolio are submitted to the Planning and Organizational Effectiveness Committee. The Planning and Organizational Committee considers the request and the rationale presented in the District Services Planning Portfolio and prioritizes this request for consideration by the District Council. (See the “Process for Allocating Resources” timeline in this manual.)

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Process for Preparing District Services Planning Portfolios

September 2013, 2015, 2017, and 2019

District Services gathers data as needed to document progress on the previous Service Initiatives as well as feedback from the Satisfaction Survey. *<What will be (or is?) the official name of this document? This schedule needs to align with the survey schedule.>*

The appropriate district-level administrator drafts the District Services Planning Portfolio for the area(s) under his/her supervision. Refer to the accompanying narrative for the template of the District Services Planning Portfolio.



October 2013, 2015, 2017, and 2019

The administrator shares the draft District Services Planning Portfolio with other members of the unit and creates venues for discussion of the draft. The administrators revise the draft District Services Planning Portfolios based on the feedback as warranted.



November 2013, 2015, 2017, and 2019

The District Services Planning Portfolios are submitted to the Planning and Organizational Effectiveness Committee for review. Funding requests, if any, are prioritized by the Planning and Organizational Effectiveness Committee and submitted to District Council.