DISTRICT-LEVEL INTEGRATED PLANNING

Comment [PMY1]: Outline
A. Overview of District-Level Planning
B. The District Strategic Plan: Vision 2017
1. DSP Process
2. DSP
C. LACCD Integrated Planning Model
1. District Strategic Plan
2. District-Level Facilities Planning
3. District-level Technology Planning
D. Evaluation of Integrated Planning
1. Annual Assessment of DSP Goals
2. Assessment of Integrated Planning Process
E. Planning, Evaluation, and Resource Allocation

The LACCD has established district-level integrated processes for strategic, financial, facilities, and technology planning. District-College planning is integrated within each domain and there are inter-relationships among these domains, as shown in Figure 1 below. These highly collaborative processes provide a coherent framework for district-college planning and integration with the goal of promoting student learning and achievement.

Figure 1: District Planning Integration

1. District Strategic Planning

The District Strategic Plan (DSP), **Vision 2017,** is the principal framework for integration of college and district-level planning. College strategic plans are integrated with the District Strategic Plan (DSP), ***Vision 2017***, through alignment of goals between the two. In the LACCD, colleges are directly responsible for establishing their own strategic goals and objectives in response to the educational, workforce, and cultural needs of the communities they serve. The DSP created a framework for district-wide integration of college-level activities and initiatives. The structure of the DSP allows colleges to maintain autonomy and responsibility for implementing the goals and objectives of the District plan, based on their local conditions and institutional priorities. To ensure plan consistency and integration, DSP measures were developed for each college, and the District as a whole, based on a uniform methodology and data sources. Formally adopted by the LACCD Board of Trustees on February 6, 2013, **Vision 2017** built on the District's first plan, the *LACCD District Strategic Plan 2006-2011*, which was designed to achieve the District's newly revised mission and to support the goals of the State Community College System Strategic Plan.

Vision 2017 was developed by the District Strategic Planning Committee (a special ad hoc committee of the District Planning and Accreditation Committee) which was created to carry out the District strategic planning process. Over the period 2011-2012, this committee conducted extensive internal and external scans that provided the following information:

Student access data	Student success data
Financial aid data	Student and employee profiles
Fiscal effectiveness data	Area demographics
Area educational attainment	High school achievement data
Regional business and economic trends	Regional labor market demand

The Committee also conducted "SWOT" focus groups with stakeholders at all college and district locations to gather information about current District strengths and weaknesses as well as the opportunities and threats the District will face in future years. Draft goals and objectives are forwarded to the Board's Institutional Effectiveness and Student Success Committee for review before being sent to the full Board for final approval. Once approved, the new DSP goals are used to inform Board and college goals.

Vision 2017 contains four goals, thirteen objectives, and multiple outcome measures and describes the collective priorities of all LACCD colleges and the ESC toward improving student learning and achievement.

The DSP is evaluated at the mid-point of the planning cycle and is revised during the final year of the planning cycle. Mid-cycle evaluation is conducted by DPAC, which re-evaluates the district mission, goals, objectives, and metrics for currency and relevance, with a focus on alignment with national and state-wide initiatives, accreditation standards, and utility of data.

BK note: this describes what happened. Going forward, what is the review cycle? How will the review/update process take place?

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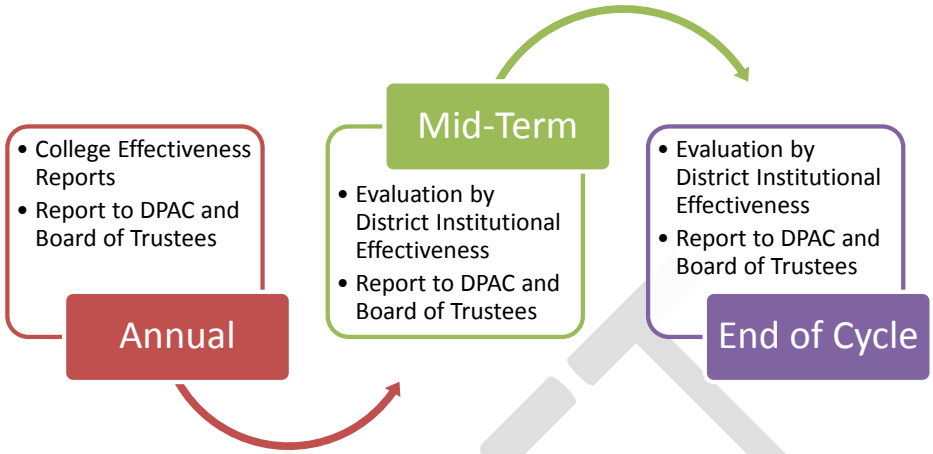
Figure x: Reporting and Evaluation Cycle for District Strategic Plan



2. District-Level Financial Planning

As part of the annual district-wide financial planning process, colleges and District jointly establish district-wide FTES targets for the upcoming academic in spring semester of each academic year. These targets, which incorporate college and district-level enrollment projections, are reviewed by the Chancellor's Cabinet, District Budget Committee, and the Board's Budget and Finance Committee prior to final adoption of the budget in August of each year.

The District's Budget Allocation Model utilizes these FTES projections and additional revenue streams to determine each college's allocation and funding for ESC centralized services. During the operational planning process, in March of each year, colleges and the ESC develop budgets that reflect their planning and institutional priorities. Prior to adoption, college and ESC budgets are reviewed by Board's Budget and Finance Committee to ensure that priorities align with the District's Strategic Plan's, and Board of Trustees' goals, as well as Chancellor's recommendations.

As the year progresses, both the colleges and the District monitor revenue and expenditure projections, update financial plans, and review budgets and FTES growth targets. The District's Chief Financial Officer, college, and ESC staff meet on a quarterly basis to review revenue and cost projections and discuss adjustments or actions needed to maintain their alignment. This information is reported quarterly to the Chancellor, District Budget Committee, and Budget and Finance Committee to ensure that financial planning promotes student learning and achievement.

Comment [BK2]: isn't this pretty operational?

BK NOTE: I think if we can get the sequencing of the above 3 paragraphs straightened out, the chart, below, could become a timeline ?

Figure 2: District-Level Financial Planning

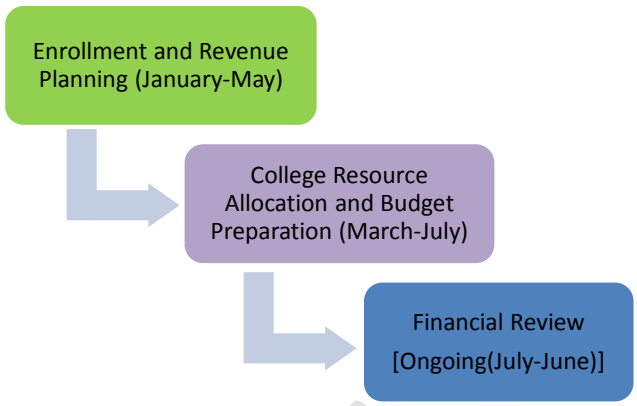
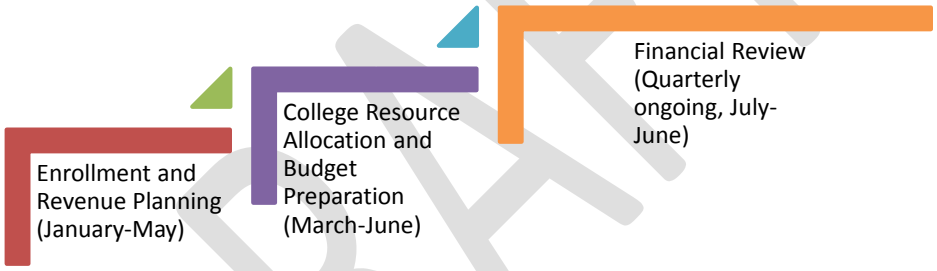


Figure 2: District-Level Financial Planning



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District-Level Facilities Planning

Comment [PMY3]: Original language. Possibly replace with Std. III language. Can use this if it can be re-written to show integration with college-level planning. Graphic may be helpful.

District-level facilities planning coordinates and consolidates the facilities planning activities of the colleges based on the District Strategic Plan and each college's strategic and educational master plans.

At the district-level, the Division of Facilities Planning and Development (FPD) is responsible for long-term planning, management, and oversight of capital improvement and bond projects and for developing creative, cost-effective solutions to facilities challenges. FPD staff work collaboratively with college administrators to define and implement the types of facilities projects that should be pursued, their size and scope, when they should be changed, the type and cost of facilities projects, and how facilities projects should be funded.

Comment [PMY4]: The construction of facilities is the result of the collaborative planning process bet, stemming from the and college educational program planning process.

District-level and college-level facilities planning are both based on the quantitative evaluation of existing space, the ability to serve students, and on carefully documented projections of future needs. FPD district-level planning is integrated with college-level planning and includes:

- Projecting regional population and population growth by specific campus or site
- Determining the anticipated type and amount of space that will be needed at each site
- Assessing existing facilities types and capacities
- Developing of State prescribed Capacity load ratios
- Developing and updating of the District's Facilities Needs Assessment
- Determining the best possible funding sources or funding options
- Reviewing and reporting on current space utilization for a facility or college

College planning occurs across the district and is an on-going and continuous activity. The colleges coordinate closely with District facility planning staff, and are mainly responsible for development of individual or a department's educational program plans and the impact on existing facilities or new space requirements.

The Master Building Program Budget Plan laid the foundation for an integrated planning and budgeting process driven by each of the nine colleges' Strategic and Educational Master Plans. These Educational Master Plans served as the basis for development of their Facility Master Plans, which addressed the long-term, often 20-25 year, building and infrastructure needs of each college.

College facilities plans are reviewed by the Division of Facilities Planning and Development and forwarded to the Chancellor before they are sent to the Board's Infrastructure Committee for review prior to Board approval.

Recommendations on district-wide real estate, capital, and bond-related policies and projects are formulated by the Division of Facilities Planning and Development in consultation with local college constituencies. The District Citizens' Oversight Committee also reports to the Board on all district-wide bond-related activities.

District-Level Technology Planning

Since 2009, LACCD has engaged in an effort to accelerate the development of District-wide minimum standards for infrastructure, cabling, data center location, sizing and environments for technology support. Standards for applications, web portals, and smart classrooms have also been developed – all of which collectively provide open architecture standards defining performances to industry protocols for interoperability, with great flexibility of products that meet the needs of each situation and college.

The District Technology Plan promotes the integration of technology planning across the colleges by establishing a common framework for college technology planning. The District Technology Plan created a goals framework and set of actions to guide District-wide technology planning while the District Technology Implementation Plan established measures and prioritized deployment of technology solutions in consideration of available resources. The Technology Planning and Policy Committee (TPPC) serves as a clearinghouse for all policy issues related to district-wide technology systems.

Comment [PMY5]: Detail:
- State Capital Outlay Funds, State Scheduled Maintenance/Special Repairs (SMSR) which includes the District's required matching funds, State Equipment Funds for State funded Capital Outlay projects or State Instructional Equipment Funds, District funds, including issuance and use of local bond funds, if any

Comment [PMY6]: Detail:
- Description of the functions and responsibilities,
- Space requirements; lab, lecture, office, and projected utilization,
- Student growth/decline projections for the programs including estimated incremental
- increase/decrease in weekly student contact hours,
- Student capacity per type of space (lecture, lab),
- Defining current instructional staffing levels and additional or changing instructional
- staff requirements (Full-time and adjunct FTE combined),
- Defining current classified staffing and related FTE and
- additional instructional and administrative support staff needed/changes; define new staffing requirements by position or job classification and additional FTE needed,
- Determining initial start-up needs, classroom equipment, office equipment, telecom, and supply needs.
- In coordination with district facility planning staff, determining potential relocation plans during construction, remodeling, or renovation and optimal timing for project; and
- Assisting facility planning staff in the identification of potential secondary effects.
- Coordination of all departments' enrollment projections (growth/decline) to ensure that total projections for the college correlate with enrollment projections and capacity load ratios provided by the District.
- Colleges shall develop educational master plans that indicate which programs are intended to grow and which programs are intended to decrease

Comment [PMY7]: Check if this is still valid

Comment [PMY8]: Use if this can be re-written to show integration with college-level planning. Graphic may be helpful

Comment [PMY9]: Add how college and district technology plans align/are integrated?

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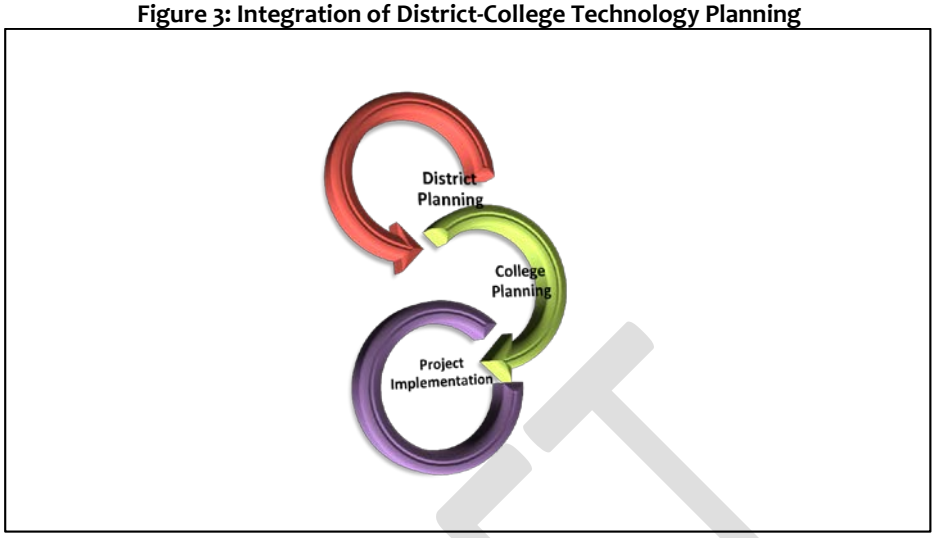
Figure 3: Integration of District-College Technology Planning



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3. Evaluation of Integrated Planning

Annual Assessment of DSP Goals

DSP measures are constructed using a uniform methodology and data sources are derived for each college, and then aggregated for the District as a whole. Colleges use their DSP measures to assess their own progress and to compare it to that of the District using the most recent three-year timeframe as the frame of reference.

Through their planning and effectiveness reporting, colleges assess progress, establish targets, and develop action plans to advance both college and District objectives. Colleges' annual assessments and those of the District as a whole are reported to the Board of Trustees on a regular annual cycle using a standard format, allowing for an apples-to-apples District-wide discussion. These reports help the Board identify and focus on a limited number of objectives for their annual goal-setting process, which in turn shapes college planning priorities and initiatives. The reporting cycle thereby serves to close the institutional effectiveness loop and promote continuous quality improvement.

District Effectiveness Reporting Cycle

The District Effectiveness Cycle is the annual process by which evaluation of plans and planning processes are communicated to key constituencies, including the Board of Trustees. The annual cycle of reporting and timeframe is described in Table x (below). This process informs the Board of Trustees' Leadership and Planning Session, which is used to review District performance and set priorities for the upcoming year. These priorities then form the planning agenda for the different domains of direct-level planning in the upcoming year

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Table x: District Effectiveness Reporting Cycle

Evaluation	Timeframe	Report To
Financial Accountability Measures and Enrollment Report	September	DBC; Budget and Finance Committee
Governance and Decision-Making Report	October	DPAC; Institutional Effectiveness and Student Success Committee
District Strategic Plan Report	December	DPAC; Institutional Effectiveness and Student Success Committee
College Effectiveness Report	February-April	DPAC; Institutional Effectiveness and Student Success Committee
District Technology Update	?	TPPC; ?
District Facilities Update	?	DCOC; ?
Board Leadership and Planning Session (August)		

<Another possible representation>

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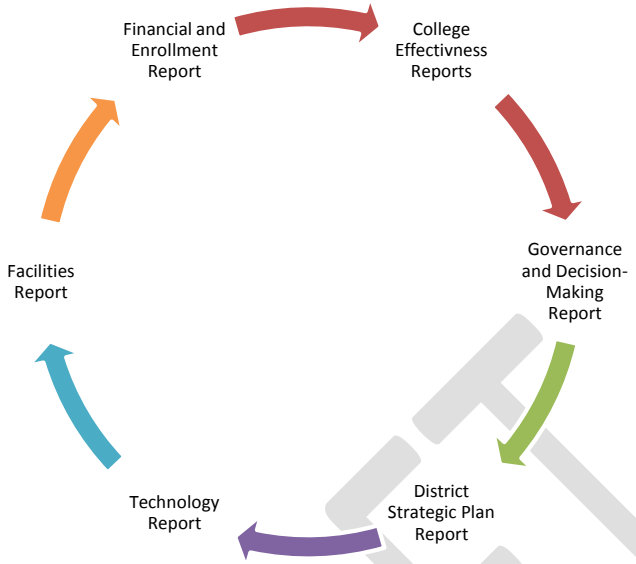

Figure 4: Evaluation of Integrated Planning Processes

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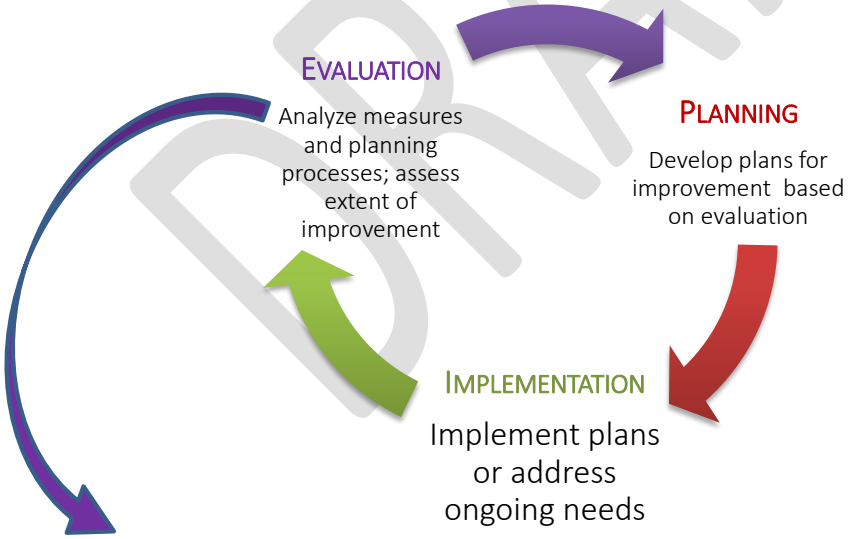
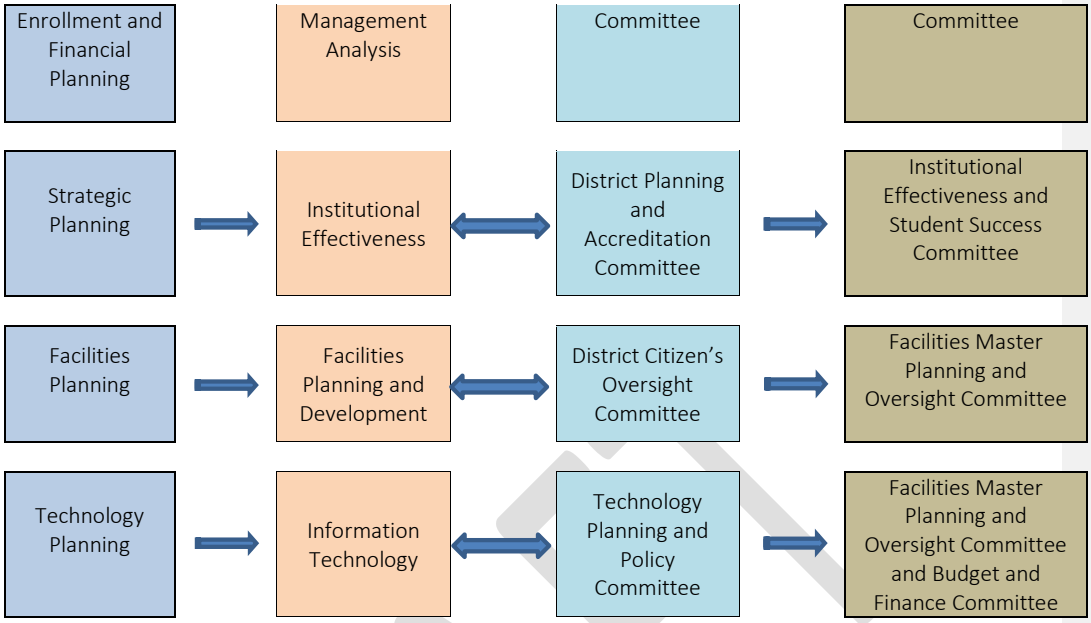


Planning Process	District-level Unit	District Governance Gommittee	Board of Trustees
	Budget and	District Budget	Budget and Finance



BK NOTE: these two things don't actually connect right now (that I am aware of), so I'd suggest either clarifying this or striking the paragraph, above.

Participatory governance committees have a policy and oversight role in planning-resource allocation processes. The evaluation of District-level integrated planning also encompasses the assessment of governance and decision-making processes

Assessment of District-Level Resource Allocation

District resources are allocated annually based on the District Budget Model and Budget Preparation process. Program Review, at both the colleges and the ESC, serves as the primary assessment mechanism for college and ESC plans and operations. The effectiveness of district resource allocation is assessed through evaluation of the District Budget Model (last evaluated in xxxx), biennially through the Governance and Decision-Making Survey, and through the annual review of the District Financial Accountability Measures by the Budget and Finance Committee.