

Rolling-up Plans in the District Offices Planning and Program Review

PREPARED BY KEITH WURTZ

INTERIM EXECUTIVE DIRECTOR, OFFICE OF INSTITUTIONAL
EFFECTIVENESS, RESEARCH & PLANNING

DECEMBER, 2016

Prioritizing Objectives at Four Levels

Department Level

- Supervisors/Manager/Administrator
- Accounting and Budget, Accounts Payable, Payroll, Contracts, Purchasing

Division Level

- Directors/Manager
- Fiscal Services, Facilities, Administrative Applications, Distance Education, Institutional Effectiveness, Printing, and Technical Services

Area

- District Police, EDCT, Fiscal Services, Human Resources, KVCR, and TESS

All District Offices

Logging-In

When the Chancellor, a Vice Chancellor, or in some cases a Director/Manager logs in they have the ability to...

- ...not only create and edit a Department or Area plan
- ...but they can also roll up the goals and resource requests for the Department or Area

Administrator/Supervisor → Department

Division → Director/Manager

Vice Chancellor → Area

Chancellor → District Offices

- [District](#)

- [District Police Department](#)

- [EDCT](#)

- [Fiscal Services](#)

- [Accounting](#)

- [Budgeting](#)

- [Payroll](#)

- [Business Services](#)

- [Facilities](#)

- [Internal Auditing](#)

- [Human Resources](#)

- [Safety and Risk Management](#)

- [KVCR](#)

- [Technology and Educational Support Services](#)

- [Administrative Applications](#)

- [Distance Education](#)

- [District Institutional Effectiveness, Research, & Planning](#)

- [Printing Services](#)

- [Technical Services](#)

Area


Division

Department



Rolling Up a Plan (Combining Objectives)

Step 1 – Click on the Department, Division, or Area Level

- [Test Parent](#) 
 - [Test 1](#)
 - [Test 2](#)
- [District](#)
 - [Distributed Education and Technology Services](#)
 - [Distributed Education](#)
 - [District Computing Services - Administrative Services](#)
 - [District Computing Services - Technical Services](#)
 - [EduStream](#)
 - [Print Shop](#)
 - District Police Department
 - EDTC

Rolling Up a Plan (Combining Objectives)

Step 2 – Click on **“Create a New Annual Plan or Program Review”**

Plans for Test Parent

- [Create a New Annual Plan or Program Review](#)
- [Create Annual Plan or Program Review by Copy](#)
- **Name:** PPR Test - Editing Progress Report
Version: 4
Group: 2011 - 2012
Type: CHC Program Review 2011-2012
Last Modified On: 11/3/2011 1:44:59 PM
Last Modified By: Michelle Riggs
State: Locked for Editing
State By: Michelle Riggs
 - [Edit Plan](#)
 - [View Versions](#)
 - [View Objective Priority List](#)
 - [View Goal Priority List](#)
 - [Reports](#)
 - [View Plan](#)
 - In order to Edit this plan, it must be unlocked.
 - In order to comment on this plan, it must be submitted and not locked.

Rolling Up a Plan (Combining Objectives)

Step 3 – The Plan Type and Group will default to the current year plans.

[Plans for Test Parent](#) >> **New Plan**

Entity Name : Test Parent

* **Plan Type**

* **Plan Group**

This Entity has children. Please select plans below to roll up their Goals and Resource Requests.

Test 2: Copy of Test 2 Program Review ▲

Test 1: Test Unit Plan 1

Are you sure you want to create a new plan for this entity?

Rolling Up a Plan (Combining Objectives)

Step 4 – Select the plans while holding down the control key



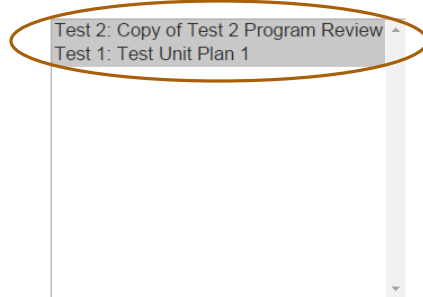
[Plans for Test Parent](#) >> New Plan

Entity Name : Test Parent

* **Plan Type** CHC Annual Planning 2013-2014 ▾

* **Plan Group** 2015 - 2016 ▾

This Entity has children. Please select plans below to roll up their Goals and Resource Requests.



Are you sure you want to create a new plan for this entity?

Rolling Up a Plan (Combining Objectives)

Step 5 – Click “Yes”

[Plans for Test Parent](#) >> **New Plan**

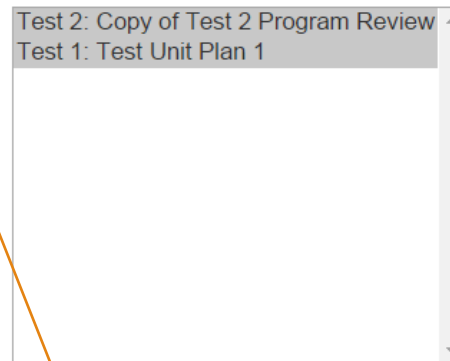
Entity Name : Test Parent

* **Plan Type** CHC Annual Planning 2013-2014 ▾

* **Plan Group** 2015 - 2016 ▾

This Entity has children. Please select plans below to roll up their Goals and Resource Requests.

Test 2: Copy of Test 2 Program Review ▲
Test 1: Test Unit Plan 1



Are you sure you want to create a new plan for this entity?

Rolling Up a Plan (Combining Objectives)

The new roll-up plan has been created

You can view and edit the plan and objectives just like you can with other plans

• **Name:** Test Plan Roll-Up

Version: 1

Group: CHC Roll Up Plan

Type: CHC Program Review

Last Modified On: 2/9/2011 9:25:25 AM

Last Modified By: Keith Wurtz

State: Available for Editing

State By: Keith Wurtz

- [Edit Plan](#)
- [View Versions](#)
- [View Objective Priority List](#)
- [Reports](#)
- [View Plan](#)
- [Submit Plan \(Draft\)](#)
- [Submit Plan \(Finalized\)](#)
- [Delete Plan](#)
- In order to comment on this plan, it must be submitted and not locked.

Rolling Up a Plan (Combining Objectives)

Step 6 – Click on **“Reports”** to roll-up the objectives and resources into Excel

- **Name:** Test Plan Roll-Up
- Version:** 1
- Group:** 2010 - 2011
- Type:** CHC Program Review
- Last Modified On:** 2/9/2011 9:25:25 AM
- Last Modified By:** Keith Wurtz
- State:** Available for Editing
- State By:** Keith Wurtz

- [Edit Plan](#)
- [View Versions](#)
- [View Objective Priority List](#)
- [Reports](#)
- [View Plan](#)
- [Submit Plan \(Draft\)](#)
- [Submit Plan \(Finalized\)](#)
- [Delete Plan](#)
- In order to comment on this plan, it must be submitted and not locked.

Rolling Up a Plan (Combining Objectives)

Step 7 – Click on “**View Objective Priority List**” to prioritize the objectives

- **Name:** Test Roll-Up 3
 - Version:** 1
 - Group:** 2010 - 2011
 - Type:** CHC Program Review 2010-2011
 - Last Modified On:** 2/9/2011 3:24:39 PM
 - Last Modified By:** Keith Wurtz
 - State:** Available for Editing
 - State By:** Keith Wurtz
 - [Edit Plan](#)
 - [View Versions](#)
 - [View Objective Priority List](#)
 - [View Goal Priority List](#)
 - [Reports](#)
 - [View Plan](#)
 - [Submit Plan \(Draft\)](#)
 - [Submit Plan \(Finalized\)](#)
 - [Delete Plan](#)
 - In order to comment on this plan, it must be submitted and not locked.

Rolling Up a Plan (Combining Objectives)

Step 8 – Prioritize objectives either by clicking on the arrows or by clicking on the numbers. View goals and resources by clicking on details.

[Plans for CHC](#) >> [2014 - 2015 CHC CHC Roll Up Plan 2014-2015](#) >> **Objective Priority List**

This page is suitable for printing. Just make sure you expand the areas you want printed before you print. You can use your browsers print option or you can [print this page](#).

Id	Priority	Title	Details
7.1	1	➔ Facilitate the continued development and streamlining of the outcomes assessment process by collecting, documenting, and analyzing institutional, program, and course level outcome data.	Details
34.2	2	➔ ➔ Adequately support the operations of the new buildings.	Details
34.3	3	➔ ➔ Provide cleaning services to maintain the health and safety of the campus.	Details
23.1	4	➔ ➔ Increase student engagement and involvement by facilitating increased participation in student clubs as measured by an increase in the number of students participating in clubs as well as the number of club activities on campus.	Details
106.1	5	➔ ➔ Support the learning of cognitive, affective and psychomotor skills through a new FT Faculty hire.	Details
32.6	6	➔ ➔ Increase full time faculty staffing in the tutoring center	Details
3.3	7	➔ ➔ Provide consistent front line reception, scheduling and information service and support to ensure optimal student access to mandated SSSP services.	Details
6.1	8	➔ ➔ Provide continuous A/V support during hours of operation. Increase available man-hours during semester breaks for maintenance of A/V equipment	Details
18.1	9	➔ ➔ Increase FTES according to growth plan.	Details
18.2	10	➔ ➔ Increase class fill rates according to growth plan.	Details


Rolling Up a Plan (Combining Objectives)

Step 9 – Click on “**Reports**” and then “**Objective Priority Report**” to export objectives and resources into Excel

Plans for District

- [Create a New Annual Plan or Program Review](#)
- [Create Annual Plan or Program Review by Copy](#)
- **Name:** 2014 - 2015 District District Program Review
Version: 2
Group: 2014 - 2015
Type: District Program Review
Last Modified On: 3/5/2015 2:39:13 PM
Last Modified By: Albert Maniaol
State: Submitted (**Finalized**)
State By: Albert Maniaol
 - [View Versions](#)
 - [View Objective Priority List](#)
 - [View Goal Priority List](#)
 - [Reports](#)
 - [View Plan](#)

Plans for District >> 2014 .

- [Objective Priority Report](#)
 - [Goal Priority Report](#)
 - [Progress Report](#)
- 

Rolling Up a Plan (Combining Objectives)

For each program the following fields are exported to Excel: Area, Area Priority, Area Objective, Division, Division Priority, Division Objective ID, Department, Department Priority, Department Objective ID, Objective, Goal, Impact Type, Resource ID, Resource, Resource Type, Expenditure Category, Year 1-3 Cost, and Year 1-3 Savings

ObjectivePriorityReport.xlsx - Excel

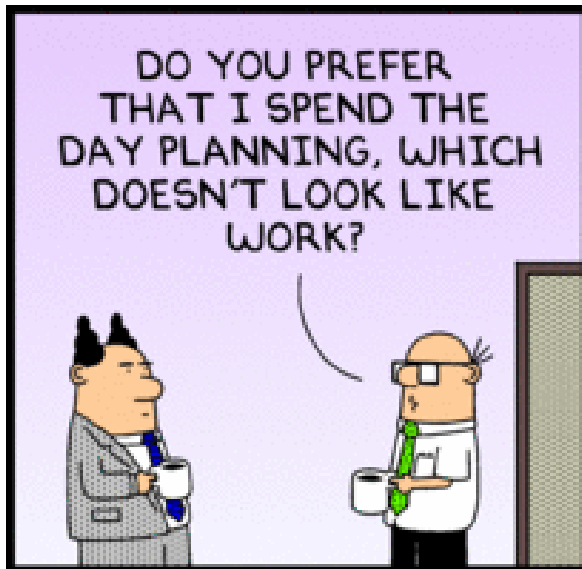
Area	Area Priority	Area Objective	Division	Division Priority	Division Objective	Department	Department Priority	Department Objective	Unit Priority	Unit Objective	Objective Name
District	1.1		Fiscal Services		1.1	Safety and Risk Management	1.1				The program survey indicated that a shortage of EH&S person
District	2.1		EDCT		1.1						Collaborate with other educational institutions, government
District	7.2		EDCT		2.2						Secure sustainable funding to support community outreach
District	43.1		Human Resources		11.1						Increase HR Generalist presence at the campus.
District	12.2		Human Resources		3.1						Effectively and consistently communicating information to c
District	3.5		District Police Department		1.1						Decrease Cost of Dispatch Services and Enhance Officer Safe
District	4.6		Technology and Educational Support Services		1.1	Printing Services	1.1				Review internal procedures
District	8.7		Technology and Educational Support Services		2.2	Technical Services	1.1				Implement hardware and software standards for network in
District	62.7		Technology and Educational Support Services		20.2	Technical Services	11.2				Create the district security policy
District	26.7		Technology and Educational Support Services		6.2	Technical Services	3.1				Implement mechanisms that will aid in the identification an
District	63.7		Technology and Educational Support Services		21.2	Technical Services	12.4				Upgrade District E-mail System
District	64.7		Technology and Educational Support Services		22.2	Technical Services	13.1				Move TESS to a safe working environment
District	65.7		Technology and Educational Support Services		23.2	Technical Services	14.1				Improve emergency communications
District	66.7		Technology and Educational Support Services		24.2	Technical Services	15.1				Improve Telecommunication services
District	9.8		District Police Department		2.2						A lieutenant position is needed for efficiency.
District	9.8		District Police Department		2.2						A lieutenant position is needed for efficiency.
District	5.9		KVCR		1.2						Hire additional staff to achieve sustainability.
District	5.9		KVCR		1.2						Hire additional staff to achieve sustainability.
District	5.9		KVCR		1.2						Hire additional staff to achieve sustainability.
District	5.9		KVCR		1.2						Hire additional staff to achieve sustainability.
District	5.9		KVCR		1.2						Hire additional staff to achieve sustainability.
District	5.9		KVCR		1.2						Hire additional staff to achieve sustainability.
District	5.9		KVCR		1.2						Hire additional staff to achieve sustainability.
District	10.1		Fiscal Services		2.2	Accounting	1.1				Investigate key metrics that measure the financial performa

Rolling Up a Plan (Combining Objectives)

Important to Remember

- Only Plans that are (**Finalized**) are rolled-up

Questions



Dilbert.com DilbertCartoonist@gmail.com



12-14-09 ©2009 Scott Adams, Inc./Dist. by UFS, Inc.

