

MERCED
COLLEGE



Integrated Planning Handbook

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Integrated Planning

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Introduction

The purposes of this Integrated Planning Handbook are to:

- Describe the purposes, scope, and structure of the integrated planning process;
- Provide an overview of the integrated planning process;
- Describe the institutional goal development process that connects program review, the strategic plan, and the ILOs;
- Explain the integrated planning cycle and the steps in it;
- Provide calendars for integrated planning participants;
- Explain how review and revision of the integrated planning process occurs within the District.

This Integrated Planning Handbook is reviewed and revised as needed by the Educational Master Planning Committee (EMPC) or in response to users' requests for clarification and enhancement.

Purposes, scope, and structure of Integrated Planning

Purposes

The fundamental purpose of ongoing, integrated planning and program review is to maintain and if possible improve the effectiveness of every college program and service and of the institution as a whole, based on the results of regular, systematic assessment. The ultimate beneficiaries of integrated planning and program review are our students and the community we serve.

A secondary purpose of the process is to focus available resources—such as staff time, budget, technology, space—on the achievement of goals and objectives intended to maintain or improve effectiveness. Achieving some objectives requires resources over and above what is available, which means that a resource request is necessary. But achieving other goals requires no extra resources—only the reallocation of existing ones.

Scope

The planning and program review process applies to every part of every college division (Instruction, Student Services, Administrative Services, and President's Office).

Organizational Chart-Planning Structure

ARC—Assessment Review Committee

ASMPC—Administrative Services Master Planning Committee

EMPC—Educational Master Planning Committee

FMPC—Facilities Master Planning Committee

IMPC—Instructional Master Planning Committee

SAC—Standing Accreditation Committee

SSMPC—Student Services Master Planning Committee

A detailed description of the master planning committees is available in the Shared Governance handbook.

Structure

The Educational Master Planning Committee (EMPC) coordinates the planning process. The Assessment Review Committee (ARC) is responsible for coordinating the program review process. The responsibilities of major committees involved in the process are given below.

College Council is responsible for the following:

- In consultation with the EMPC, evaluating the integrated planning process and recommending improvements to the process;
- Evaluating and recommending improvements to the Shared Governance *Handbook*.

EMPC is responsible for the following:

- Monitoring the progress of the integrated planning process;
- Developing Strategic Plan goals;
- Ensuring the development of goals within the master planning committees that align with the Strategic Plan goals;
- Reviewing the prioritization of resource allocation requests;
- Making recommendations to the Superintendent/President on collegewide resource allocation priorities;

- Ensuring that the vice presidents report on the progress made within their areas;
- In consultation with the College Council, evaluating the integrated planning process and recommending improvements to the process and the Planning and Program Review *Handbooks*;
- Monitoring progress on Strategic Plan goals and objectives

Master planning committees are responsible for the following:

- Developing goals that are consistent with Strategic Planning goals but that also emphasize student learning, the student educational experience, or institutional effectiveness from the perspective of that area, i.e., Instructional Master Planning Committee (IMPC), Student Services Master Planning Committee (SSMPC), Administrative Services Master Planning Committee (ASMPC), and Facilities Master Planning Committee (FMPC);
- Prioritizing resource requests that apply to their respective planning areas;
- Evaluating their roles in the integrated planning process.

ARC is responsible for the following:

- Maintaining the documents utilized in the program review process;
- In consultation with EMPC, updating the Program Review *Handbook*, which describes the program review process;
- Recommending professional development related to the program review process;
- Evaluating the program review forms, rubrics, and process, and implementing improvements on a continual basis;
- Completing the “State of the ARC” document, which highlights trends documented in program reviews from all areas of the college.

EMPC is co-chaired by the Superintendent/President and the Academic Senate president.

EMPC membership includes representatives from the master planning committees, faculty, classified professionals, students, and management. The President’s Office maintains the records for [EMPC](#).

ARC is co-chaired by the Dean of Institutional Effectiveness and a program review coordinator chosen by the committee. The co-chairs of the ARC oversee the committee’s [archives](#).

The master planning committees are co-chaired by the Superintendent/President or applicable vice president and a member selected by the committee. Master planning committees are shared-governance committees and as such have representation from all campus constituent

groups. For more information on the master planning committees, see the *Shared Governance Handbook*. Master planning committee records are maintained by the respective vice presidential offices and are available for review on the portal.

Overview of the Integrated Planning and Program Review Cycle



A detailed description of the major committees involved in integrated planning and other shared-governance activities is available in the *Shared Governance Handbook*.

Step 1: EMPC goal development

EMPC annually reviews the Strategic Planning Goals. It is also responsible for developing and renewing the Strategic Plan on a timeline mutually approved by College Council and EMPC. The Strategic Plan is based on the College Mission and is informed by and evaluated against ILOs and master planning documents. The goals are developed with input from ARC in the form of the "State of the ARC Report", budget committee, and the results of the assessment of the ILOs.

The College Council will be informed of the Strategic Plan goals when the process is completed and the information will be disseminated to the master planning committees to be used for the development of their goals (Instruction, Student Services, Administrative Services, Facilities, and Presidential direct reports not listed).

Step 2: Annual goal development

Goals are generated by the master planning committees and reflect recommendations from completed program reviews produced by each of the college divisions. Goals are consistent with the Strategic Plan goals developed in Step 1 by EMPC and where appropriate, directly support the attainment of the Strategic Plan.

The goals will lead to collegewide program improvements that are aligned with area improvement needs and with the college mission, strategic plan, institutional learning outcomes and master plan documents.

The college divisions composed of Instruction, Administrative Services, Student Services, , and Presidential direct reports not listed are involved in development of goals. Their respective master planning committees are IMPC, ASMPC, SSMPC, and FMPC.

Step 3: Program review focus on Strategic Plan goals

Purpose of Program Review

Program review is a process that asks members to assess their program, identify necessary adjustments, implement changes to improve student learning and success and program effectiveness, and then begin the cycle again. For more details see the Program Review Handbook.

Step 4: Program Review Committee analysis

Receiving and Reviewing the Program Review Report

- Each program review team will develop an annual report, that addresses the questions delineated in the Program Review *Handbook*;
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- Program review teams will make any necessary revisions and then submit their final report to their respective master planning committees.

Step 5: Institutional Administrative Review

Merced College's institutional administrative review process is designed to confirm the feasibility of the action plans contained in the annual program reviews. The process also ensures that the final list of priorities that is based on the action plans and resource requests (see Step 6) is aligned with Strategic Plan and master planning goals.

The President's Cabinet engages in the administrative review process. The college divisions use their own processes to complete reviews and provide input that helps guide the master planning committees' prioritization of resource allocation requests. Details are available in the Program Review Handbook.

Step 6: Resource Allocation

After approval by the respective program review committees (ASPRC, IPRSLOAC, SSPROC), the resource allocation requests (both personnel and non-personnel) submitted in program reviews are prioritized by each master planning committee(**Figure 6.1**). For specifics on resource allocation refer to the master planning committee responsibilities. An updated resource allocation prioritization list is forwarded for review to the vice presidents, who have

each been a part of the discussion. The vice presidents then merge all requests into one list for EMPC. Additionally, members of cabinet place planned expenditures on this newly merged list.

The list is presented, discussed, and voted on at EMPC annually based on need and available funds. The vice presidents present their findings to EMPC and College Council as needed; both bodies review and approve the categorized list before sending it to the Superintendent/President for final approval. The Superintendent/President then presents the list to the Board of Trustees.

It is important to note that the faculty hiring prioritization process is separate from the resource allocation process outlined here.

Step 7: Board of Trustees presentation

As the budget is being developed, budget assumptions are presented to Budget Committee and EMPC. The Vice President of Administrative Services presents the District's tentative and final budgets to the Board of Trustees each year..

Step 8: Implementation of action plans

Beginning on July 1, programs begin implementation of their action plans.

Step 9: Accountability review

Beginning in the spring, the vice presidents report to the Educational Master Planning Committee (EMPC) and the College Council on the progress of the action plans that have been implemented over the school year.

Planning Calendar Steps

Integrated Planning Step Calendar		Timeline
Step 1	<p>EMPC Goal Development</p> <ul style="list-style-type: none"> • Multi-year mission and goal emphasis; Committee shares with the College Council • Utilize Educational Master Plan, Strategic Plan, ISLO assessment and the State of the ARC Report for goal development; the Board of Trustees is informed about the goal development 	August-September
Step 2	<p>Annual Component Goals Development</p> <ul style="list-style-type: none"> • Instruction (IMPC), Administrative Services (ASMPC), Student Services (SSMPC), Facilities (FMPC) 	October-November
Step 3	<p>Program Review development, consistent with institutional and component goals</p> <ul style="list-style-type: none"> • Annual action plans are created (annual/comprehensive as applicable) • Action plans/goals/resource requests are consistent with component goals and institutional goals 	Completed March-August
Step 4	<p>Program Review committee analysis</p> <ul style="list-style-type: none"> • Analysis and peer review by the applicable program review committees • Committees give feedback to refine proposed plans (IPRSLOAC, SSSPROC, , ASPRC) • Budget Committee identifies availability of funding 	<p>IPRSLOAC: March/April/May</p> <p>SSSPROC, , ASPRC: June/July/August</p>
Step 5	<p>Institutional Administrative Review</p> <ul style="list-style-type: none"> • Confirms feasibility of action plans before final priority of resource requests is established • Refines priorities for action/resource requests from an institutional perspective based on the annual component goals and institutional goals 	August-September
Step 6	<p>Resource Allocation</p> <ul style="list-style-type: none"> • Planning committees prioritize requests within the college divisions; component goals are utilized in the prioritization • Faculty Hiring prioritization process occurs, component goals utilized to assist with the prioritization 	September-November
Step 7	<p>Superintendent/President presents to the Board of Trustees</p> <ul style="list-style-type: none"> • Results of the process are announced to College Council and EMPC and disseminated campuswide 	May/June

Step 8	<p>Implementation of action plans</p> <ul style="list-style-type: none"> • Action plans are implemented and money is spent from the budget on new infrastructure, equipment, personnel, etc. • Deans/managers document progress to report to VPs 	July
Step 9	<p>Accountability review</p> <ul style="list-style-type: none"> • VPs report on the progress of the action plans to EMPC • Review and revision of the integrated planning process and the <i>Handbook</i> • Committees complete self-assessments 	April/May

**Merced College Planning and Resource Allocation Process
(a multi-year cycle of planning)**

Month	Cycle: Implementation and Analysis Phase	Cycle: Goal Setting and Alignment Phase	Cycle: Review and Decision-making Phase
July	<p>Implementation of action plans begins and continues through the school year using the plans from the previous year’s planning cycle (Step 8)</p> <ul style="list-style-type: none"> • Money begins to be spent from the budget on new infrastructure, equipment, personnel, etc. • Deans/managers document progress to report to VPs 		
August	<p>Implementation (Step 8)</p>	<p>EMPC Goal Development (Step 1)</p> <ul style="list-style-type: none"> • Multi-year mission and goal emphasis • Committee shares with the College Council • Utilize Educational Master Plan, Strategic Plan, ISLO assessment and State of the ARC Report for goal development 	<p>Institutional Administrative Review of plans generated from the program reviews completed in the spring (Step 5)</p> <ul style="list-style-type: none"> • Confirms feasibility of the action plans • Refines priorities for action/resource requests from an institutional perspective based on the annual component goals and institutional goals
<p><u>Other Planning Activities:</u></p> <ul style="list-style-type: none"> • EMPC meets on the 4th Thursday of the month for budget update • Master planning committees schedule first meeting for first week in September • Budget Committee reports budget (including assumptions) to EMPC for information 			

<p>September</p>	<p>Implementation (Step 8)</p> <ul style="list-style-type: none"> Board of Trustees to adopt Merced College budget 	<p>EMPC Goal Development is completed (Step 1)</p>	<p>Institutional Administrative Review completed (Step 5)</p> <ul style="list-style-type: none"> Annual program reviews completed in the prior year begin to be used on or near Sept. 15. <p>Resource Allocation (utilizing PR from previous year) (Step 6)</p> <ul style="list-style-type: none"> Planning committees prioritize requests within the college divisions Component goals are utilized in prioritization Resource requests (personnel, equipment, facilities, etc.) are sent (in prioritized order) to appropriate master planning committee. This includes communicating requests to other master planning committees if appropriate (i.e. an instructional program has requested physical space for its instruction).
<p>October</p>	<p>Implementation (Step 8)</p>	<p>Annual Component Goals Developed (Step 2)</p> <ul style="list-style-type: none"> Instruction (IMPC) Administrative Services (ASMPC) Student Services (SSMPC) Facilities (FMPC) 	<p>Resource Allocation (utilizing PR from previous year) (Step 6)</p> <ul style="list-style-type: none"> Planning committees prioritize requests within the College divisions Component goals are utilized in prioritization Vice presidents also submit their requests to all master planning committee. New faculty request prioritization process begins first week of October

November	Implementation (Step 8)	Annual Component Goals are completed (Step 2) Program Reviews development begins, consistent with institutional and component goals (Step 3) <ul style="list-style-type: none"> • Annual action plans are created (annual/comprehensive as applicable) • Action plans/goals reflect component goals 	Resource Allocation (utilizing PR from previous year) (Step 6) <ul style="list-style-type: none"> • Planning committees prioritize requests within the college divisions • EMPC reviews requests submitted by VPs • Component goals are utilized in prioritization • Master planning committees finalize their resource request priorities and forward to their respective vice presidents by Nov. 15 . • Hiring prioritization process occurs; component goals are utilized to assist with the prioritization
<p><u>Other Planning Activities</u></p> <ul style="list-style-type: none"> • Vocational dean/grant administrators report grants and Perkins monies to master planning committees for information 			
December	Implementation (Step 8)	Program Reviews developed (Step 3)	Resource Allocation (utilizing PR from previous year) (Step 6) <ul style="list-style-type: none"> • Vice presidents merge resource requests into one list, add “planned expenditures,” and forward document to EMPC for review by early January • EMPC reviews and approves initial prioritization for resource requests.
January (Governor releases tentative	Implementation (Step 8)	Program Reviews developed (Step 3)	

state budget)	<u>Other Planning Activities</u>		
	<ul style="list-style-type: none"> • Master planning committees resume meetings: EMPC meets on the fourth Thursday of January for budget information • Budget Committee reports budget (including assumptions) to EMPC for information • Programs are informed by the appropriate master planning committee of the resource request status 		
February	Implementation (Step 8)	Program Reviews developed (Step 3)	Resource Allocation (utilizing PR from previous year) (Step 6) <ul style="list-style-type: none"> • Vice presidents assign requests into categories and share findings with EMPC and College Council. • College Council and EMPC (2nd Thursday of the month) review and approve the resource request list. • Recommendations are forwarded to the Superintendent/Pres.
March	Implementation (Step 8)	Program review development continues and the beginning of the peer review period for program reviews begins (Step 3 and 4) <ul style="list-style-type: none"> • The respective oversight committees review action plans/program reviews from their College divisions • Budget Committee identifies availability of funding 	
	<u>Other Planning Activities:</u> <ul style="list-style-type: none"> • All master planning committees evaluate their process as indicated in this planning document • ARC evaluates institutional learning outcomes assessment results 		
April	Implementation (Step 8)	Program review development and peer	

	<p>Accountability review (for the current year spending) (Step 9)</p> <ul style="list-style-type: none"> • VPs report on the progress of the action plans to EMPC and College Council 	<p>review period continues (Step 3 and 4)</p> <ul style="list-style-type: none"> • The respective oversight committees review action plans/program reviews from their College divisions • Budget Committee identifies availability of funding 	
<p><u>Other Planning Activities:</u></p> <ul style="list-style-type: none"> • All master planning committees review and update their master planning documents and assess their role in integrated planning 			
<p>May</p>	<p>Implementation (Step 8)</p> <p>Accountability review (for the current year spending) (Step 9)</p> <ul style="list-style-type: none"> • VPs report on the progress of the action plans to EMPC and College Council • Programs report back to their respective master planning committees as to how their allocated resources were utilized over the course of the year 	<p>Program Review committee analysis is completed for instruction; program review development and peer review period continues in other College divisions (Step 3 and 4)</p> <ul style="list-style-type: none"> • Budget Committee identifies availability of funding 	<p>Superintendent/President presents tentative budget to the college community (Step 7)</p> <ul style="list-style-type: none"> • Results of the process are announced to College Council and EMPC and disseminated campuswide
<p><u>Other Planning Activities:</u></p> <ul style="list-style-type: none"> • Budget committee updates budget (including assumptions) to EMPC for information • Tentative budget to EMPC 			
<p>June</p>	<p>Implementation (Step 8)</p>	<p>Program review development and peer</p>	<p>Superintendent/President presents tentative budget to</p>

(State adopts budget)		<p>review period continues in College divisions other than Instruction (Step 3 and 4)</p> <ul style="list-style-type: none"> • June and July • Ready by August 	<p>the college community (Step 7)</p> <ul style="list-style-type: none"> • Results of the process are announced to College Council and EMPC and disseminated campuswide • Tentative budget to Board of Trustees
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Major Planning Committee Calendars

EMPC Calendar	
July	
August	<p>EMPC Goal Development (Step 1)</p> <ul style="list-style-type: none"> • Multi-year mission and goal emphasis • Committee shares with the College Council • Utilize Educational Master Plan, Strategic Plan, ISLO assessment and the State of the ARC Report for goal development <p><u>Other Planning Activities:</u></p> <ul style="list-style-type: none"> • EMPC meets on the fourth Thursday of the month for budget update • Master planning committees schedule first meeting for first week in September • Budget Committee reports budget (including assumptions) to EMPC for information
September	EMPC Goal Development is completed (Step 1)
October	
November	<p>Resource Allocation (utilizing PR from previous year) (Step 6)</p> <ul style="list-style-type: none"> ▪ EMPC reviews requests submitted by VPs and communicates back to appropriate master planning committees
December	<p>Resource Allocation (utilizing PR from previous year) (Step 6)</p> <ul style="list-style-type: none"> • EMPC reviews and approves initial prioritization for resource requests.
January	<p><u>Other Planning Activities</u></p> <ul style="list-style-type: none"> • Master planning committees resume meetings: EMPC will meet the fourth Thursday of January for budget information • Budget Committee reports budget (including assumptions) to EMPC for information • Programs are informed by the appropriate master planning committee of the resource request status
February	Resource Allocation (utilizing PR from previous year) (Step 6)

	<ul style="list-style-type: none"> • EMPC (second Thursday of the month) reviews and approves the resource request list • Recommendations are forwarded to the Superintendent/President
March	<p><u>Other Planning Activities:</u></p> <ul style="list-style-type: none"> • All master planning committees evaluate their process • EMPC reviews ILO assessment results
April	<p>Accountability review (for the current year spending) (Step 9)</p> <ul style="list-style-type: none"> • VPs report on the progress of the action plans to EMPC and College Council
	<p><u>Other Planning Activities:</u></p> <ul style="list-style-type: none"> • All master planning committees review and update master planning document and assess their role in integrated planning • Evaluation of the integrated planning process occurs in EMPC utilizing input from the master planning committees; review and revision of the <i>Handbook</i> are conducted as needed
May	<p>Superintendent/President presents tentative budget to the college community (Step 7)</p> <ul style="list-style-type: none"> • Results of the process are announced to College Council and EMPC and disseminated campuswide • Committees complete self-assessments
	<p>Accountability review (for the current year spending) (Step 9)</p> <ul style="list-style-type: none"> • VPs report on the progress of the action plans to EMPC and College Council
	<p><u>Other Planning Activities:</u></p> <ul style="list-style-type: none"> • Budget committee updates budget (including assumptions) to EMPC for information • Tentative budget to EMPC • College Council and EMPC determine changes to be made in the <i>Handbook</i>
June	

Master Planning Committee Calendar	
August	Master planning committees schedule first meeting for first week in September
	<p>Institutional Administrative Review of plans generated from program reviews completed in the spring (Step 5)</p> <ul style="list-style-type: none"> • Refines priorities for action/resource requests from an institutional perspective based on the annual component goals and institutional goals
September	<p>Resource Allocation (Step 6)</p> <ul style="list-style-type: none"> • Resource requests are sent to the appropriate master planning committee • Vice presidents submit resource requests to the appropriate master planning committee • Requests are communicated between master planning committees if appropriate

	<ul style="list-style-type: none"> • Planning committees prioritize requests within college divisions • Component goals are utilized in prioritization
October	Annual component goals are developed in the master planning committees (Step 2) <ul style="list-style-type: none"> • IMPC, ASMPC, , SSMPC, FMPC • Component goals are developed consistent with institutional goals • Planning committees continue to work on prioritizing resource requests
November	Annual component goal development is completed (Step 2)
December	Master planning committees may not meet
January	<ul style="list-style-type: none"> • Master planning committees resume meetings • Programs are informed by their master planning committees of the status of resource requests (prioritization) • Merged lists go to all master planning committees
February	No deadlines
March	<ul style="list-style-type: none"> • Master planning committees evaluate their processes with respect to integrated planning, resource allocation, and their role as a planning committee
April	Review and Revision <ul style="list-style-type: none"> • Master planning committees work on a review of the integrated planning process and make recommendations for revision of the process to EMPC
May	Accountability Review (Step 9) <ul style="list-style-type: none"> • Deans report on how resources were used to the appropriate master planning committee
	Review and Revision <ul style="list-style-type: none"> • Committees complete self-assessments • Master planning committees submit a review of the Integrated Planning process and recommendations for revision of the process to EMPC

Assessment Review Committee (ARC) Planning Calendar	
	<ul style="list-style-type: none"> •
August	<ul style="list-style-type: none"> • State of the ARC Report is complete and ready to be used for goal development (Step 1).
March	<ul style="list-style-type: none"> • Results of the ISLO assessment are disseminated to EMPC and the College Council
April	<ul style="list-style-type: none"> • Evaluation of program review processes for each area
May	<ul style="list-style-type: none"> • Instructional deans submit summaries of their area program reviews to ARC for inclusion in the ARC report that will be completed in August • Non-instructional areas submit summaries of their program reviews to ARC

College Council Planning Calendar	
August	<ul style="list-style-type: none"> • EMPC shares draft Institutional Goals with the College Council for input
March	<ul style="list-style-type: none"> • Assessment Review Committee reports results of the Institutional Learning Outcomes Assessment

April	<ul style="list-style-type: none"> • VPs report on the progress of action plans from their college divisions • College Council receives input from EMPC about revision of the <i>Handbook</i>
May	<ul style="list-style-type: none"> • College Council and EMPC determine changes to be made in the <i>Handbook</i>

Review and revision of the process

EMPC is charged with determining an instrument and process that can be used to review and evaluate the integrated planning process. The instrument will then be administered to the major planning committees.

The Office of Institutional Effectiveness will implement the process/instrument chosen by EMPC to evaluate the integrated planning process.

The data gathered will provide EMPC with information that will be used to determine improvements to the integrated planning process as described in this handbook.