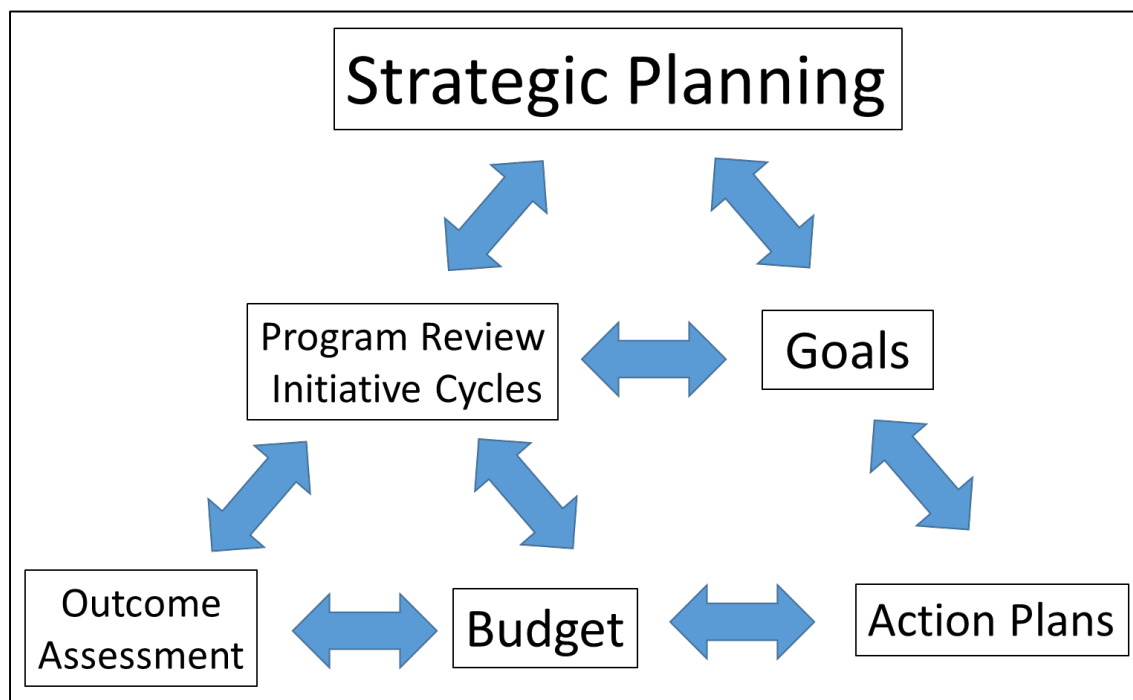


An Updated Guide to Program Review and Strategic Planning at Merced College



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Introduction

As you can see from the cover figure, strategic planning can be quite complex due to the many connections between concerns involved in the process. Merced College is currently using the eLumen Connect software to maintain the college's curriculum library and catalog, and to track outcomes assessment. Outcomes are assessed to determine if students can demonstrate they have successfully mastered the knowledge, skills, and abilities in their courses and programs. Results from outcome assessments are used to generate action plans from the department and Area level up to the institutional level. The Strategic Planning section allows departments to review programs of study at the college and categorizes Assessment results, Action Plans, and Requests for Information to guide the Continuous Quality Improvement process. As stated on the [Merced College Strategic planning](#) webpage,

The purpose of the Merced College Strategic Plan is to assess our strengths and weaknesses; take stock of how we operate and how we might change over the next few years; and then determine where we want to be in the future and how best we can get there. This allows us to manage and allocate resources more effectively and to make key decisions within a clear strategic context ensuring we are serving our students and the community in the best possible ways.

In this document, we will explore the Strategic Planning tools available in the eLumen Connect software package. During the previous year Instructional programs in eLumen included sections for listing the program goals and the resource allocation requests. **This year faculty and staff will be updating three sections in the program reviews from 2018-19: the Program Summary, Assessment Summary, and Program Trends sections in their program review initiatives. The Planning Summary section of the Program reviews from last year with the Planning Goals and the Resource Allocation information will be migrated into the eLumen database this year.**

In order to make links between various elements we will go through the steps involved in moving the goals and objectives from the Planning Summary 2018-19 section. Once the goals are in the eLumen Profile for the program we can map them to goals for the Areas or the institution in the system. Finally, the program goals will be linked to specific sections within the strategic planning initiative, and progress in reaching these goals can be tracked within the software. Resource requests are entered when the goals are linked within the initiative and linked to outcomes at the course, program or institutional level. These requests will automatically appear in the Budget management section in the Strategic Planning Initiative.

As a reminder, if course outcomes are not mapped to the program outcomes you will run into trouble generating links between the program goals and the resource requests. Area coordinator access is needed in order to access the curriculum mapping tool in eLumen. More

Program Summary
Program Mission and Access - Instruction 2018-19
Documentation of Dialogue - Instruction 2018-19
Assessment Summary
Instructional PLO - eLumen results 2018-19
Summary of Program Outcome Assessments 2018-19
Program Trends
Instructional Program Demographics 2018-19
Impacts on the Program 2018-19
Planning Summary
Planning Goals - Instruction 2018-19
Resource Allocation Information 2018-19
Feedback and Approvals
CAT feedback and approval 2018-19
Deans Comments and Approval 2018-19

information on this process can be found on the PROAC website or using the following link – [Curriculum Mapping in eLumen](#)

Examples will be provided showing how to transfer the goals for the program into the eLumen database. Once the goals are created they can be linked to the relevant sections in the program review and mapped to goals at the department, area or institutional levels. Resource requests will be made in these linked goals. Implementing these tools will allow the college to determine how resource allocations are being used with respect to student success and measure progress at reaching the goals.

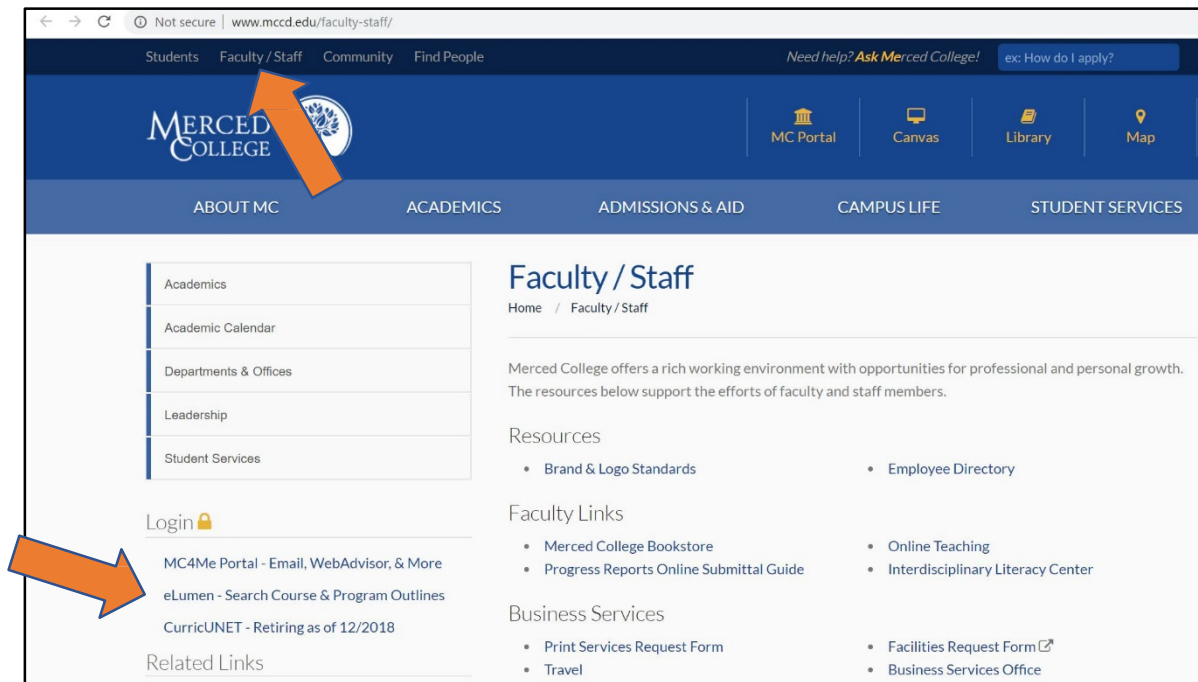
The overall goal is to more effectively identify areas where changes could be made that result in an increase in student success at Merced college, both inside and outside of the classroom.

Navigating to the eLumen website

1. The eLumen website can be accessed from the Faculty/Staff link found at the top of the Merced College Homepage. (see the figure below with the orange arrows)

You can also access the website directly using the following link - mccd.elumenapp.com

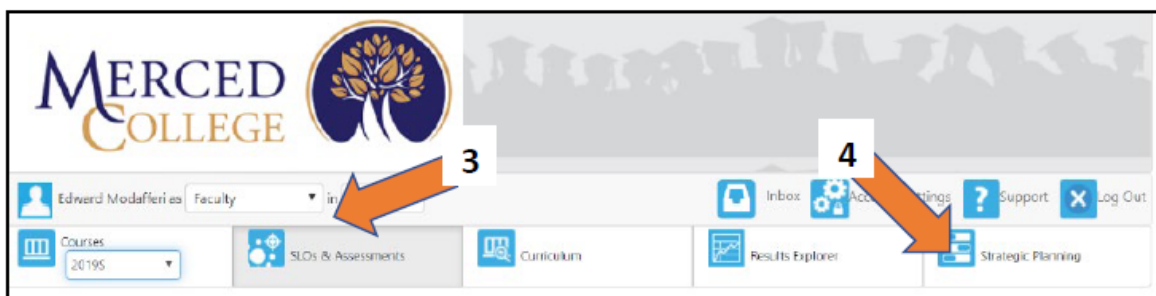
2. Log into eLumen using the same credentials you would use to access your Merced College email account.



Getting to the Strategic Initiative with the program review

3. Select your role and your program/department using the menus (arrow #3 on the top left side of the screenshot below)

Setting your role to Faculty limits the other menu to your assigned departments.



4. Select the Strategic Planning tab on the right side of the screen. (arrow #4 above)

Strategic Planning tools and your role in eLumen Connect

The blue arrows in the figure below show the different “tabs” available in eLumen Connect when the role is set to “Faculty”. This screen allows users to work on normal everyday tasks including: SLO assessments, curriculum, and Strategic Planning initiatives related to program review.

Tools available in eLumen Connect

The screenshot shows the eLumen Connect interface. At the top, the user is identified as Edward Modafferi as Faculty in Biology. Navigation tabs include Courses (2020F), SLOs & Assessments, Curriculum, Results Explorer, and Strategic Planning. Three blue arrows point to the SLOs & Assessments, Curriculum, and Strategic Planning tabs. Below the tabs are filters for Organization (Biology), Type (Program Review), and Included in this term (None selected). A table below shows a list of program reviews, with one entry: Biology Instruction Program Review 2018-19, described as 'This is the instruction program review cycle for 2018-19'.

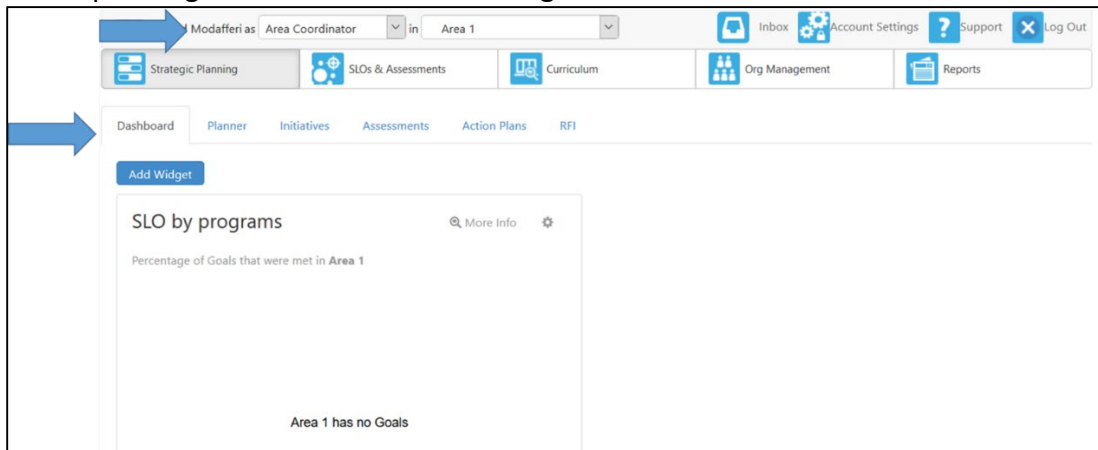
In order to access the new tools working with goals and resource allocations faculty and staff will need to reset their role in eLumen to Area coordinator. Faculty and staff can check available roles associated with their account in eLumen using the drop down menu next to their names in the upper left corner of the screen, shown in the figure below. Note, this role is not automatically assigned to users - the assessment coordinators and the SLO/SAO Program Review Assistant can make this change to your eLumen account settings.

Checking the available “roles” for your account

The screenshot shows the eLumen Connect interface with the role selection dropdown menu open. The user is Edward Modafferi as Faculty in Biology. The dropdown menu lists the following roles: Area Coordinator, Area Dean, CAT, Data Steward, Faculty, PROAC, SLO Coordinator, Staff, and Staff for Cohort Review. A blue arrow points to the Area Coordinator role.

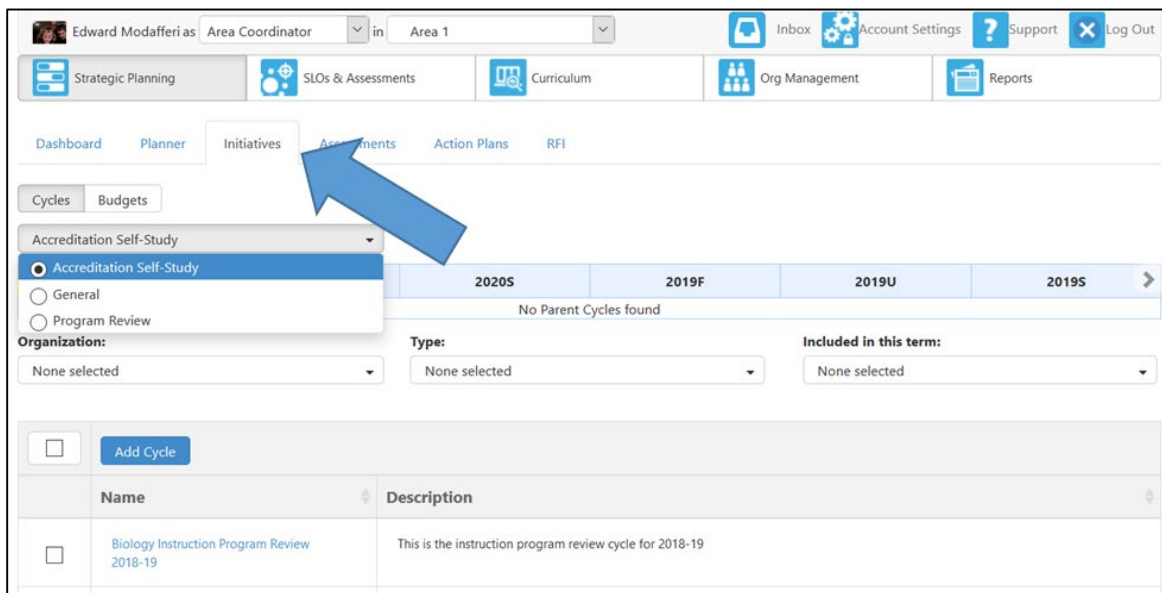
Navigating to the Strategic Planning Initiatives section

1. As an “Area Coordinator” extra tabs will be visible in the middle of the screen where the arrow is pointing to the Dashboard in the figure below.



2. From the Strategic Planning screen, clicking on the Initiatives tab will open up a new screen similar to below.

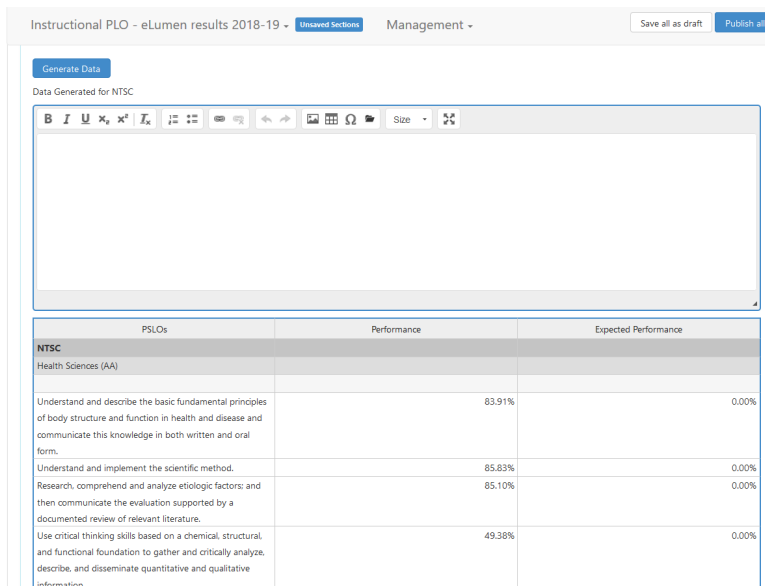
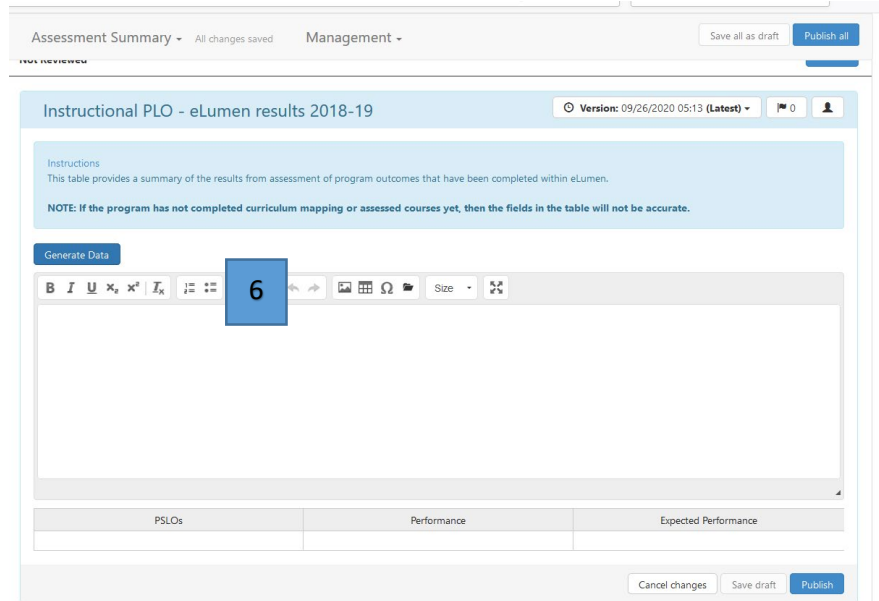
NOTE: The list of programs on this screen will vary depending on your assignment and your role settings - the figure below is set to Area Coordinator for Area 1.



3. Use the drop down menu in the middle of the page to generate the Cycles list with the program reviews.
4. Click on the blue title for the program review you will be working on. In the figure above it is listed as Biology Instruction Program Review 2018-19.

5. Read over the information in the first three sections filled out last year. Verify the Program Mission and Access sections are still up to date.
6. In the Assessment summary section, click on the **Generate Data** button to update the results with course assessments that took place in the last year.
7. Select the appropriate degrees and certificates associated with the program.

Assessment Summary before data is auto-generated



Example after the data is auto-generated.

NOTE: If the table shows only zero percent for the Performance column, more than likely the curriculum mapping needs to be updated.

Contact Edward Modafferi for additional help – some of the program outcome lists in the database are not lining up correctly. Sometimes we can generate the data separately, and paste it into the text box above the auto-generated table.

8. Update the next sections in the **Summary of Program Outcome Assessments 2018-19**, providing a narrative on the program outcome (P-SLO) assessments and results
 - a. Briefly describe how the program learning outcomes are being assessed.
 - b. Summarize the assessment data and/or results for each program learning outcome – this was provided in the table above.
 - c. Provide an analysis and interpretation of the results for each PLO/SAO (include benchmarks where appropriate)

9. In the **Program Trends** section faculty can comment on the new program review datasets provided by the Office of Institutional Effectiveness. You will need to log into the MC4Me portal in order to access the Instructional Program Review Datasets.
 - a. What trends did you identify in student performance for your program?
 - b. What trends did you identify in staffing for your program?
 - c. What trends did you identify in staffing for your program?
 - d. What trends did you identify in student Demographics for your program?

10. The last section to update this year, **Impacts on the Program**, allows for comments on changes that have occurred which might be affecting the program or department and its effectiveness.
 - a. Have there been any internal/external changes to this program/department which have had a significant impact on the program's goals and/or effectiveness? If so, please explain.
 - b. List any resources your students would benefit from having in the LRC. (i.e. books, journals, media, etc.)
 - c. Is there anything else you would like to be considered in the annual strategic initiative document?

In the next section of this document we will look at how program, departments and Areas can create a list of goals and objectives associated with their profile in eLumen. Information in the Planning Goals section from the previous program review will be used to create the goals. **These goals will be aligned to sections in the Strategic Initiative program review allowing for reporting on progress at achieving the goals within the program, department, Area, or the institution.**

Goals and Objectives

Goals and Objectives must first be entered in the database before they can be linked to a section. Only faculty with the role of Area Coordinator can link Goals and Objectives to a Strategic Initiative (SI) section.

Step 1: Transferring the goals to the Profile for the program or Area

1. Make sure your role is set to Area Coordinator and you have selected the appropriate Area and/or program from the list in the upper left corner next to your name.

2. Click on the **Org Management** tab in the middle of the screen.

The screenshot shows the user interface with the user name 'Edward Modafferi' and role 'Area Coordinator'. A dropdown menu for 'Area 1' is open, listing various disciplines: Astronomy, Biology, Biotechnology, Chemistry, Earth Sciences, Engineering, Geology, Mathematics, NTSC, Physical Science, Physics, and Water/Wastewater Technology. The 'Org Management' tab is highlighted in the navigation bar. A blue box with the number '1' points to the user name/role area, and another blue box with the number '2' points to the 'Org Management' tab.

3. Near the bottom of this screen is the list of goals – this will be blank for most programs until we complete the following steps and the goals are entered in the software.

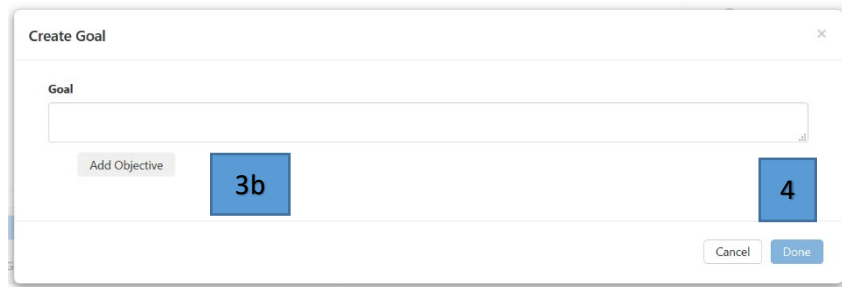
NOTE: Goals are the end result - where you want to be in the future. Objectives are the steps used to achieve that goal. The objectives can be viewed as a check list of what needs to be completed in order to accomplish the goal.

The screenshot shows the 'Chemistry' program profile. The 'Goals' section is highlighted with a blue box containing the number '3'. Below it, there are buttons for 'Add Goal' and 'Align Goals', with a blue box containing the number '5' pointing to the 'Align Goals' button. A table lists a goal and its objectives.

Goal	Objective
Assess SLOs for all chemistry courses	Assign a point person for each course Decide which assessment to use Collect data Discuss

a. Clicking on the **Add Goal** button will open up a new window shown below. Initially it starts out with just the text field to enter your goal statement.

b. Clicking on the **Add Objective** button in the Create Goal window will open new text fields.



4. When finished entering the goals and objectives, make sure to click on **Done**.

5. You should return to the Profile screen - Click on the **Align Goals** button in the Profile will open up a table used to map the goals.

NOTE: Currently the goals and objectives in the Merced College Strategic Plan are displayed in the top row, while the program goals and objectives are listed in the first column of the table.

Strategic Plan	1. Employ enrollment management strategies to support student success, progression, and completion/transfer	1.1 Develop guided pathways within metamajors, including stacked credentials, and in connection with K12 and university partners (Director of Guided Pathways & FYE)	1.2 Strengthen scheduling to provide effective, efficient, student-centered course offerings, delivered through structured time blocks, that also maximize FTES generat...	1.3 Design and develop innovative programs and expand educational programming to meet workforce needs (esp in Ag, IT, and CTE) (Dean of Career Technical Education)
Program Goals	Chemistry			
Assess SLOs for all chemistry courses				
Assign a point person for each course				
Decide which assessment to use				
Collect data				
Discuss				

Clicking on the boxes in the table inserts a check mark in that cell to indicate the goal or objective for the program maps to the plan for the college. Once enough programs map their goals/objectives to the Strategic Plan, we will be able to run reports in eLumen to determine progress made on the Strategic plan goals and objectives that have been mapped.

The easiest method I have found to transfer the program goals is to open 2 browser windows. In the 1st web browser window, open up the strategic planning initiative with the program review entered last year - scroll down to the Planning Summary section with the Planning Goals table. In the 2nd window, have the eLumen Profile page for the program. (see the screenshots in the examples below).

Double click on the cells in the table in the Planning goals section, select the text and copy/paste to the appropriate box in the Profile table where you are entering the goals. The objectives for that goal in the Profile correspond to the Action plan steps in the section from last year – these can also be copied over to the Profile or entered manually.

Example of Planning Goals section created in 2019

Planning Goals - Instruction 2018-19 ▾ All changes saved Management ▾ Save all as draft Publish all

Instructions
Remember, you can't simply say, "I want" and expect it to happen.
 1. **Planning goals:** Goals should be Specific, Measurable, Attainable, Relevant, and Time Bound.
 2. **Action Plan steps:** Consider the work or actions required in order to reach the goal. Get specific and plan out the steps needed along the way to reaching the goal.
 3. **Timeline:** Short term goals would take less than 1 year, while long term goals would be in the 3-5 year range.
 4. **Plan status update:** The individual steps in the action plan should be monitored as they are completed, to measure progress being made toward reaching the ultimate goal.

Planning Goal	Action Plan Steps	Timeline	Plan Status Update
1. Assess SLO's for all chemistry courses.	Assign a point person for each course, decide on which assessment(s) to use for each course, collect data, and discuss.	1 year	Several faculty are working to learn how to navigate eLumen.
2. Increase student success in chemistry	Investigate the possibility of STEM faculty	2 years	As of Fall 2019, the chemistry department

Example of the Profile in the Org Management tab with goals and objectives

Chemistry
 Academic
 Mission [Edit Mission](#)

Faculty: 18
 Courses: 6
 Contexts: 0

Goals

Goal	Objective
Assess SLOs for all chemistry courses	Assign a point person for each course Decide which assessment to use Collect data Discuss

The first line from the Planning goals section has been moved to the Chemistry Profile in the example above and a new goal with objectives for the Chemistry program is now in the eLumen database.

As the college becomes more sophisticated in our strategic planning processes, it will be useful for instructional Areas to work on collective goals that can be used in eLumen.

Step 2: Adding the Area Coordinator as a collaborator on the Initiative document

Area coordinators need to be listed as collaborators on the specific program review initiatives. If you need help with this process, please contact Edward Modafferi for assistance.

1. Make sure your role is set to Area coordinator and you have selected the correct program.
2. Open the program review – click on the Strategic planning tab, and then Initiatives.
3. Choose Program Review in the drop down menu under the Cycles/Budgets buttons - you should see a table with a list of programs in the Area. **Click on the program title in blue.**

The screenshot shows the user interface with a top navigation bar containing 'Edward Modafferi as Area Coordinator' and 'Area 1'. Below this are tabs for 'Strategic Planning', 'SLOs & Assessments', 'Curriculum', 'Org Management', and 'Reports'. A secondary navigation bar includes 'Dashboard', 'Planner', 'Initiatives', 'Assessments', 'Action Plans', and 'RFI'. Under 'Initiatives', there are 'Cycles' and 'Budgets' buttons. A dropdown menu is open, showing 'Program Review' selected. Below the menu is a table of cycles: 2020F, 2020U, 2020S, 2019F, 2019U, and 2019S. A blue bar indicates 'Merced College Instruction Program Review Cycle 2018-20'. Below this are filters for 'Organization', 'Type', and 'Included in this term', all set to 'None selected'. At the bottom, there is an 'Add Cycle' button and a table with columns 'Name' and 'Description'. The table contains one entry: 'Biology Instruction Program Review 2018-20' with a description: 'this is the instruction program review review cycle that was started for 2018-19 and will be updated for the 2019-20 cycle.'

We are going to switch between Active mode and Design mode so the goals were entered in the previous step can be linked to this document. This is one of the more frustrating things in the software.

4. Click on the **To Design Mode** button near the top right corner in the Initiative.

The button will read **To Active Mode** after the switch has been made.

The screenshot shows the document page for 'Biology Instruction Program Review 2018-20'. The page has a header with 'Dashboard', 'Planner', 'Initiatives', 'Assessments', 'Action Plans', and 'RFI'. Below this are 'Cycles' and 'Budgets' buttons. The main content area shows the document title and a 'Download' button. A blue box labeled '4' highlights the 'To Design Mode' button. Below this is a 'Cycle Announcement' section with the text: 'This is the instruction program review review cycle that was started for 2018-19 and will be updated for the 2019-20 cycle.' At the bottom, there is a 'Save all as draft' button and a 'Publish all' button. Below this is a 'Program Summary' section with a 'Review' button. The 'Program Summary' section contains the text: 'Program Mission and Access - Instruction 2018-19' and 'Version: 10/11/2019 21:32 (Latest)'. Below this is an 'Instructions' section with the text: 'Use this section to comment on your program mission or on how your program serves the mission of the institution. Please limit your responses to a single, brief'.

- Click on the **Manage SI Collaborators** button on the right side of the top section.

Chemistry Instruction Program Review 2018-20

Program Review
This is the instruction program review review cycle that was started for 2018-19 and will be updated for the 2019-20 cycle.



Strategic Initiative Report

To Active Mode

Cycle Announcement

This is the instruction program review review cycle that was started for 2018-19 and will be updated for the 2019-20 cycle.

The screenshot shows the top navigation bar with 'Sections' and 'All changes saved'. Below it is the 'Program Summary' section with a 'Review' button. The main content area is titled 'Program Mission and Access - Instruction 2018-19' and includes a version dropdown set to '10/11/2019 23:20 (Latest)'. A blue box labeled '5' highlights the 'Manage SI Collaborators' button in the top right corner.

This generates a new window with the list of Collaborators for the current Strategic Initiative

- On the right side of the window under Available Users, set the Role to **Faculty**, and type the person's name in the box.

The screenshot shows the 'Manage Strategic Initiative Collaborators' window. It is divided into two main sections: 'Assigned Collaborators' on the left and 'Available Users' on the right. The 'Available Users' section has a search box and a 'Role' dropdown menu set to 'Faculty'. A blue box labeled '6' highlights the search box.

- Click on their name in the list, and it will automatically be moved to the Assigned Collaborators list on the left side.

Now that we have the goals in the system and the Area Coordinator has the ability to work on the initiative we can finally start to work in the Strategic Planning initiative to link the goals and make resource requests. **You will be switching between the Active Mode and the Design mode – please be patient as the tools in the windows that open up will vary depending on the mode.**

Step 3: Linking Goals and Objectives to sections in the Initiative with the program review

1. Verify you are in the **Design Mode** – the button on top will say “To Active Mode”
2. Scroll down to the 4th section in the Initiative, “Planning goals – Instruction 2018-19” and **click on the icon that looks like a flag with an arrow** – when your mouse is hovering over the button you will see the description “Linked Goals and Objectives” as shown in the screen shot below. If you see the gray box on top that says “Add section” – you are in Design Mode.

Add Section

Planning Summary No versions created yet for this region ⚙️

Not Reviewed Review

Planning Goals - Instruction 2018-19 Version: 01/24/2020 19:32 (Latest) 1 → 1 ⬆️ ⬇️ ⬆️ ⚙️

2 Linked Goals and Objectives

Instructions
Remember, you can't simply say, "I want" and expect it to happen.

1. **Planning goals:** Goals should be Specific, Measurable, Attainable, Relevant, and Time Bound.
2. **Action Plan steps:** Consider the work or actions required in order to reach the goal. Get specific and plan out the steps needed along the way to reaching the goal.
3. **Timeline:** Short term goals would take less than 1 year, while long term goals would be in the 3-5 year range.
4. **Plan status update:** The individual steps in the action plan should be monitored as they are completed, to measure progress being made toward reaching the ultimate goal.

Planning Goal	Action Plan Steps	Timeline	Plan Status Update
Revise the Biology program outcome statements	1. Faculty meet for curriculum mapping of Biology and Health Sciences programs 2. Author new Biology program outcome	Fall 2019- Spring 2020	Steps 1 and 2 completed for Biology program. Health Science outcomes need to be revisited.

NOTE: When starting out this will normally have zeros – the number seen in this screenshot indicates this section of the document has a single goal linked to it already.

3. In the new window, you will have the option to +Add Goals and Objectives similar to what is depicted in the screenshot below.

Link Goals and Objectives to **Planning Goals - Instruction 2018-19**

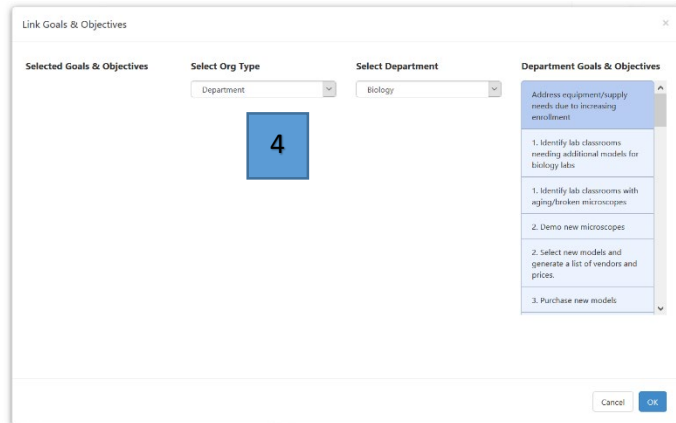
No Goals nor Objectives linked to this Strategic Initiative section

3 + Add Goals and Objectives Cancel Save

Once your flag has the numbers, indicating there are goals linked to the section in the initiative, this window will change (click on the Link Goals and Objectives button in the lower left)

4. In the Link Goals and Objectives window, use the drop down menus to select the following under the Org Type which will have different lists depending on your selections.

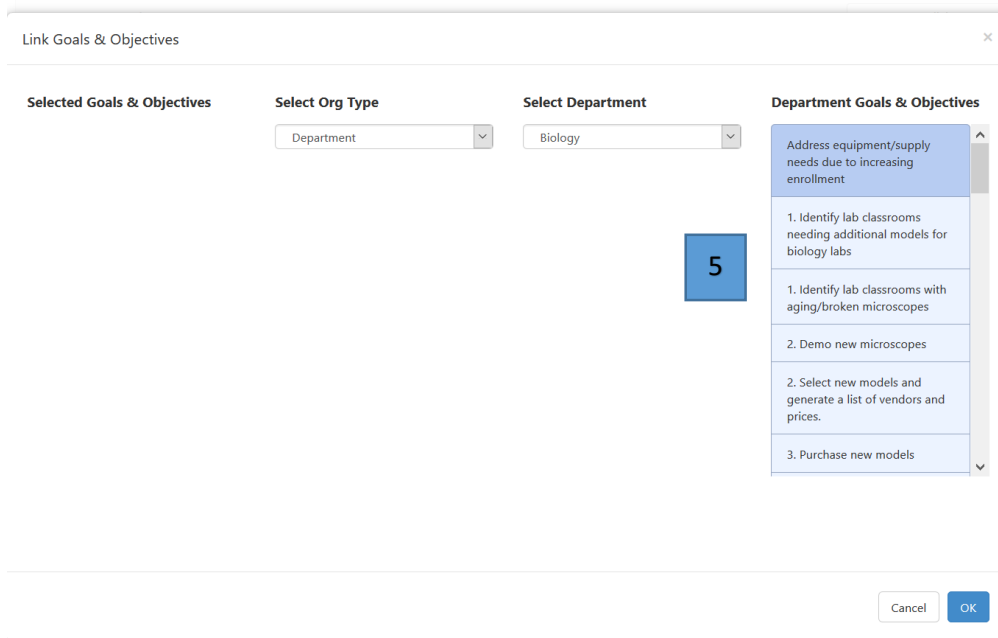
- **Institutional:** Pulls up the Merced College goals and objectives (currently the strategic plan)
- **Division:** List of goals and objectives at the Area level
- **Department:** List of goals and objectives at the program level



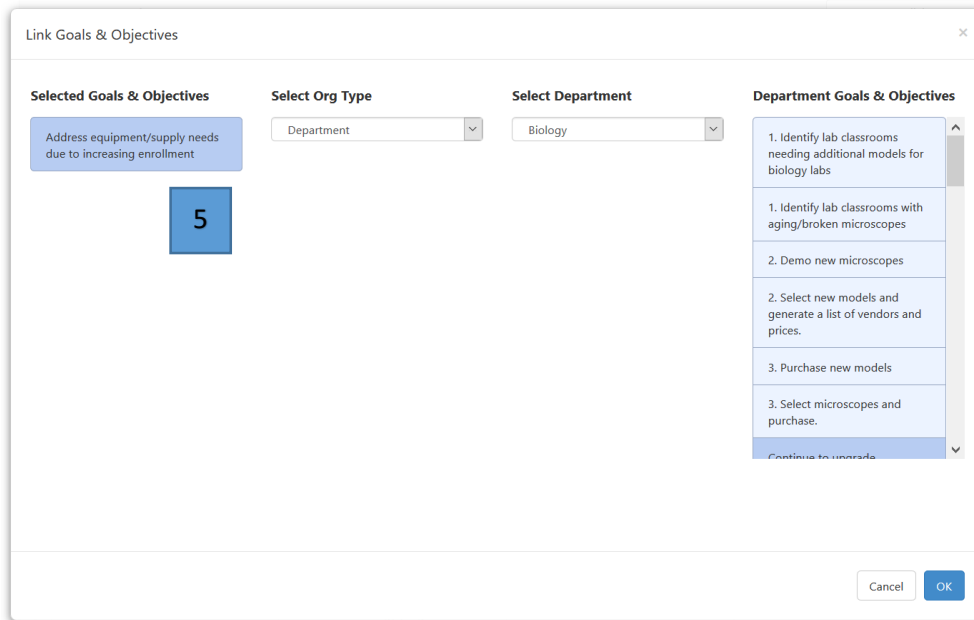
The list of goals and objectives entered in the profile during the previous step will be visible in the right column on the screen if you choose Department.

5. Select the appropriate goals and/or objectives you would like to link to this section by clicking on the box from the list on the right. The goals are in a darker shade of blue, while the objectives are the lighter blue shade.

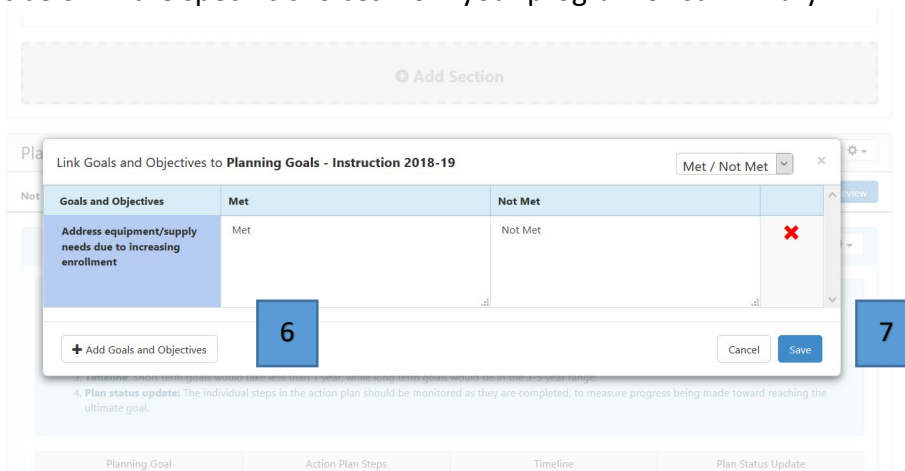
Example: Link Goals and Objectives window - right column list in blue



Example: Selected Goal moved to the left column in blue...



When finished choosing the goals and objectives you will see a window similar to the screen shot below - the specific choices from your program's list will vary.



6. The goals and objectives on this list can be modified. New ones can be added using **the + Add Goals and Objectives** button. Existing ones are removed by clicking on the red X to the right side of the window.

NOTE: Because we are in Design mode, clicking on the Met/Not Met boxes will NOT make any changes at this point.

7. When finished linking the goals and objectives, click on the blue Save button.

The flag should have a number next to it indicating the number of goals linked to this section!

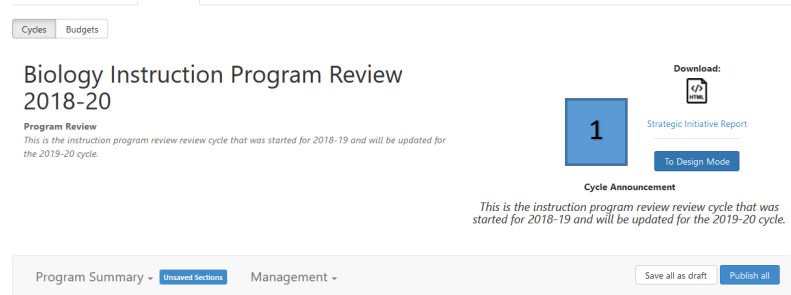
Any of the sections in the Strategic Planning initiative document can be linked to the Goals and Objectives from the program to the Area to the institutional level. We will be linking everything to the 4th section this year to simplify the process. As the college becomes more used to this software we will be able to make additional links.

For example, the goals for instructional programs can be entered and common goals for cohorts could be created in the profile for an Area. The Area goals could be linked to common goals for the Instructional Master Planning Committee (IMPC) or the goals for the institution as a whole. Assessment of the outcomes in eLumen, along with tracking whether or not the goals are being met, can be used to generate a report and gauge how the college is doing at achieving its goals.

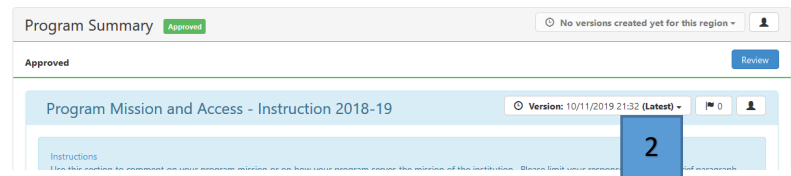
Step 4: Active Mode - linking Goals and Objectives to the sections with resource requests

In this section we will continue to work on the Profile goals linked to the section in the program review and work on resource requests that will appear in the budget. Make sure you are in Active mode to work on the resource requests

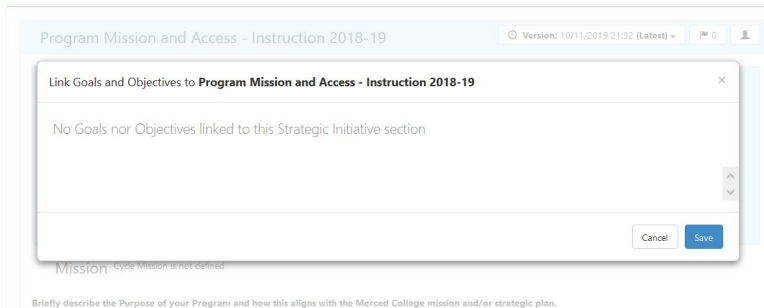
1. Verify you are the Area Coordinator and the initiative is set to the Active mode. (the button on top will say **To Design Mode**)



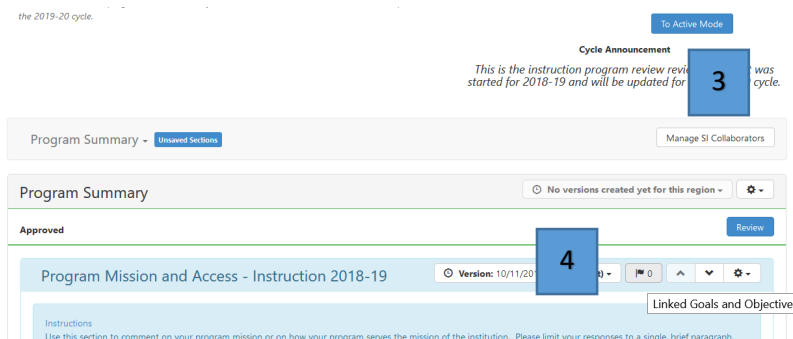
2. Clicking on the Flag icon at the top of the first section will open up a window indicating that you have not linked any Goals to this section and need to repeat the steps in the previous section. If your goals were linked in the 4th section previously you can skip to step 7 below.



Example of the window in the Active Mode indicating no goals are linked



3. Scroll back up to the top of the page and click on the **To Active Mode** button. It will switch over and say "To Active Mode". In the design mode you will see the Manage SI Collaborators button.



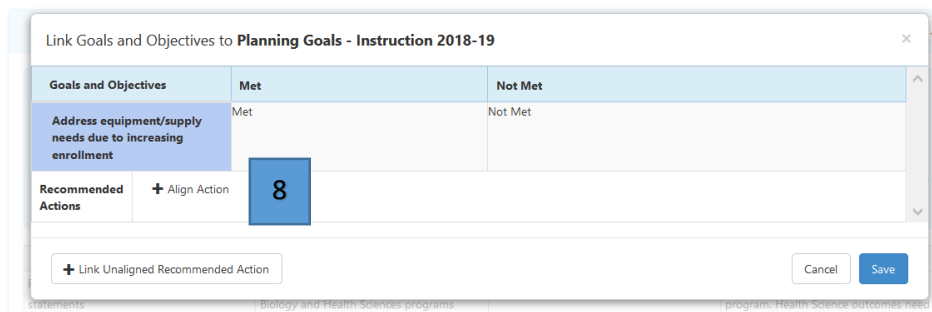
4. Scroll down to the 4th sections in the Initiative - **Planning Goals - Instruction 2018-19** - click on the icon that looks like a flag with an arrow again (yes I know you are getting dizzy at this point)
5. Hopefully the goals linked in the previous section are visible now. If not, use the gray **+ Add goals and Objectives**, add your goals and objectives and click on Save.

Example showing a single goal added to this section in the Design Mode



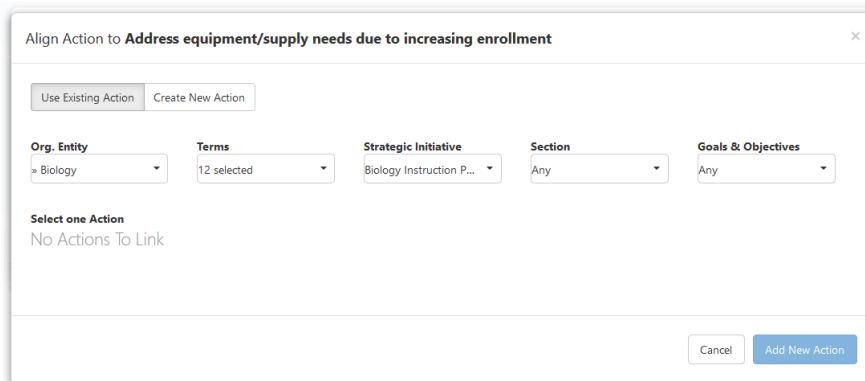
We want to be in the Active mode - verify the button on the top reads **To Design mode**.

6. Scroll back down to the 4th section again (yes I know you are getting dizzy at this point) and click on the Flag icon to open up the **Link Goals and Objectives** window.



The goals for the Program are in the system and they are linked to the section in the program review – Now we need to set up actions for the goal.

7. Next to the Recommended Actions line, click on the **+ Align Action** for the goal. This will open a window where you can describe what needs to be done for this goal to be met.
 - a. Create new Action –see the next page for a screenshot.
 - b. Use existing action – this will appear in case you want to use an action that is already in the system



Example of the Align Action window (the title changes to Edit Action if you are modifying one)

- A. **Recommended Actions** – modify the description of the objective as needed, providing more descriptions about what is being suggested
- B. **Action Type** – choose from a list of options, including:
 - Reflection
 - Study Needed
 - New Resources
 - Program Actions
 - Faculty Proposed Actions
- C. **Goals and Objectives** – this is what was entered into the Profile for reference
- D. **Linked SLOs** – this can be modified by clicking on the blue Link SLOs. This will generate a new window with a list of SLOs that can be linked to the Action – including course SLOs, Program SLOs and Institutional SLOs which parallel the General Education outcomes (I-SLOs = GELOs). Clicking on the available SLOs will activate them and move the SLO statement to the list on the left side of the window. Make sure to click Save when finished.
- E. **+ Add a Resource Request** — See below for more details on the text fields.
- F. When finished editing the Action, click the **Save Action** button on the bottom.

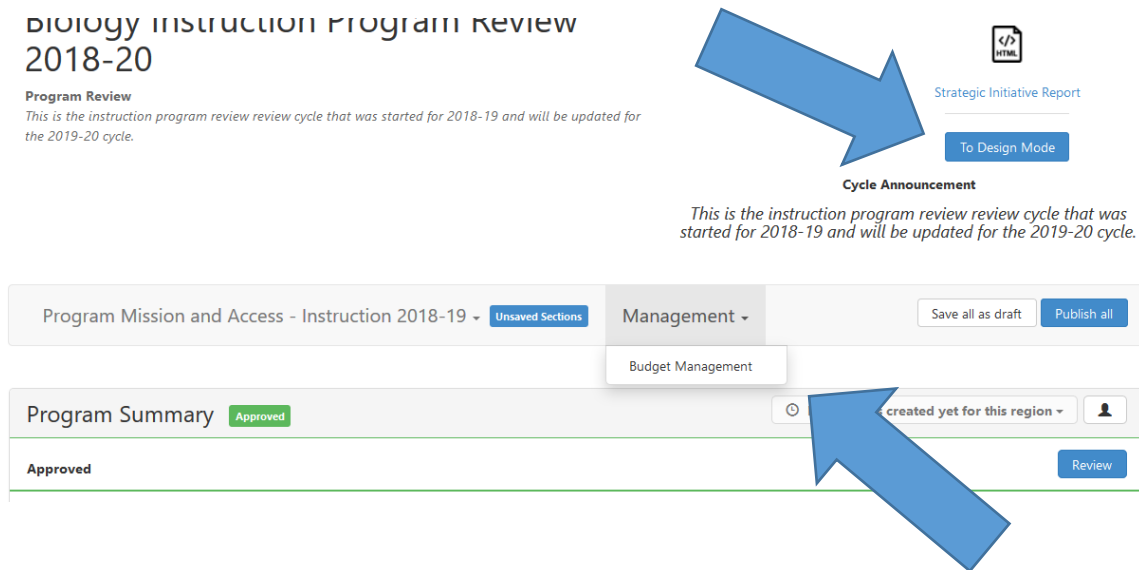
***NOTE: This is an important step – resource allocation requests should be linked to assessment results that indicate a need for a new resource which could be used in the future to increase student success.**

Example of the window when you click on the button, + Add a Resource Request



The steps taken above in the eLumen software will generate resource requests linked to the sections within the Strategic Planning Initiative document. Faculty and staff can view the requested resources in the program review at the top of the document. We have identified degrees and certificates that are not currently linked to the correct “Program” and are working on shifting them around in eLumen in order to produce a list of courses and degrees (including the outcomes) that should be associated with specific programs designated by instructional faculty at Merced College.

If you go back up to the top of the Initiative and switch back to **Active mode**, you will now see the resource requests in the Budget management section.



Example of the Budget Management in the Strategic Planning Initiative

Sections - Unsaved Sections
Management -
Save all as draft Publish all

1 - 2 of 2
Hide Save Changes

	Requester	Resource Requested	Type	Funds	Budget Category	Status
<input type="checkbox"/>	1. Edward Modafferi <small>Biology</small>	New science building <small>\$1 billion</small>	Lab Space	\$0.00	--No Budget Category-	Pending ▼ Change priority ▼
<input type="checkbox"/>	2. Edward Modafferi <small>Biology</small>	Resource #2 <small>IN order to increase the number of students completing the program and graduating, there will need to be an increase in the amount of lab space</small>	Lab Space	\$0.00	--No Budget Category-	Pending ▼ Change priority ▼

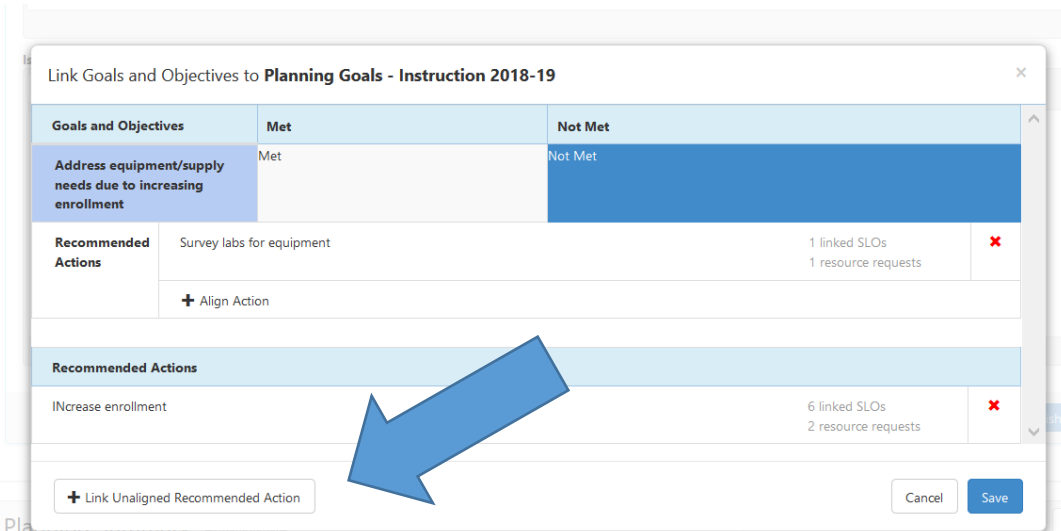
Program Summary Approved
No versions created yet for this region ▼ 👤

Approved
Review

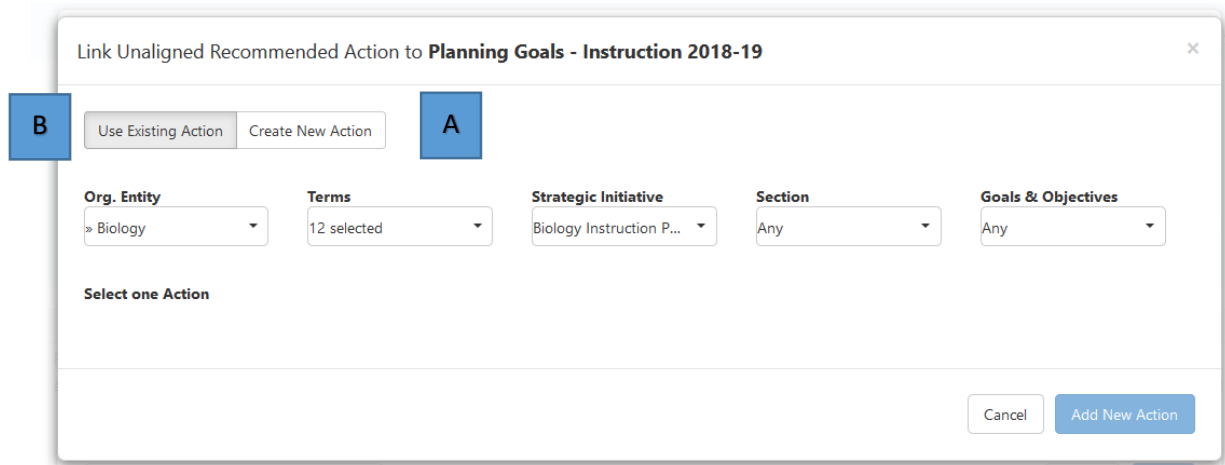
Notice the items entered in the previous steps are now gathered together to form the budget for this program. Each row in the budget can be prioritized and moved up or down in the list as needed. Additionally, we will be able to run reports within eLumen and forward all of the prioritized resource requests from Instructional Areas to the Instructional Master Planning Committee (IMPC) where they are prioritized again.

What about the + Link Unaligned Recommended Action button?

There was another button on the bottom of the window where you were linking the Goals and Objectives.



1. Clicking on this button opens up a new window of course.
2. Faculty and staff can create and use existing actions for the goals linked to the sections within the Strategic Planning Initiative.



- A. Create New Action – see the previous section. This is used by faculty and staff create actions associated with the goals and objectives.
- B. Use Existing Action – this will more than likely be empty until more faculty and staff create actions.

3. Clicking on this button Use Existing Action opens up another window where additional information can be entered to Link Unaligned Recommended Actions
 - Org Entity: select from program, Area or institutional levels
 - Terms: select from the available years in this cycle
 - Strategic Initiative: choose from a list of available program reviews. There are only 2 program to choose from currently.
 - Section: link to specific sections within the chosen Initiative
 - Goals & Objectives: Choose from the Goals and Objectives that have already been linked in the initiative.

At this point I recommend taking a break for a few minutes and running around outside screaming to release some of your tension.

[What about the Planning summary section from last year?](#)

The section used last year for the Planning goals and the resource allocation requests will not be needed in the future. It can still be used as a repository for your entries from last that might be needed. Alternatively, once the requests are linked to the goals and sections in the initiative they can be removed as needed.

In the future, linking a Goal to a section in the program review indicates the data, analysis, or narrative in that section addresses the Goal or Objective. Once a Goal is linked in the section, collaborators can mark the current progress on the Goal using a Benchmark rubric and align Actions. Aligning actions to Goals or Objectives ensures that the actions taken and the allocated resources work towards achieving the mission of the program and the institution. Likewise, analysis of goals linked to the Strategic Initiative sections can be done at the Area or institutional levels to provide evidence that programs and departments are meeting the mission of the college.