



Annual Planning Guide

for Student Services

Offices/Programs

Revised March 2022

Purpose of the Annual Planning Guide

The following document serves to provide an overview of the Annual Planning process at El Camino College. More specifically:

- What is annual planning and why is it important?
- How to draft an annual plan?

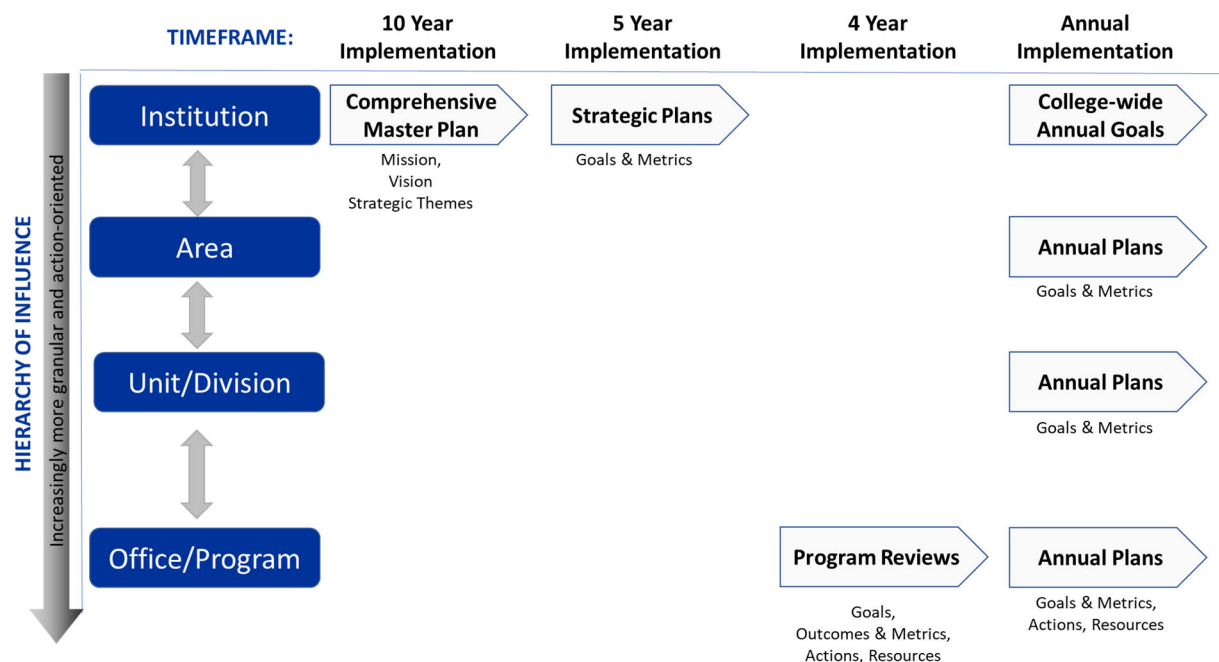
What is Annual Planning?

The annual planning process at ECC articulates the priorities that areas, divisions and programs will address within a *single academic year*. The priorities identified in the annual planning process will inform the annual budgeting process where the budget needs are articulated and prioritized to align to goals across the institution.

The annual planning and budgeting process begins in October of every year to plan for the following year. For example, 2022-23 planning would begin in October 2021. It involves all five areas of the College (President’s Office, Academic Affairs, Student Services, Administrative Services, and Human Resources) and every level within each area: programs/offices, divisions/units, and areas.

As presented in Figure 1 below, the areas adapt the College-wide annual goals to contribute to them from their unique role. The area’s annual goals provide direction to divisions/units as they articulate division/unit-level annual goals. Similarly, the division/unit-level annual goals will provide direction to the office/program’s annual goals. Each annual plan aligns and contributes to the annual plans at the next level and so on. In addition, Program Review documents (multi-year plans) serve as input into the annual planning process of programs and offices.

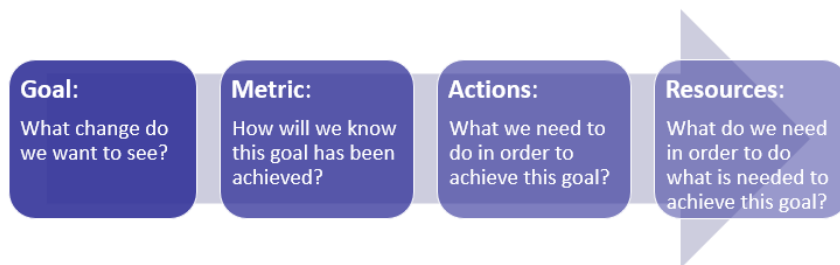
Figure 1: Alignment between ECC Planning Processes



How to draft an annual plan?

All annual plans should have the following four elements: goals, metrics, actions, and resources (see Figure 2). *Nuventive* is the online planning platform where annual plans are documented and tracked.

Figure 2: Elements of an Annual Plan



Goals are statements that describe the change that is needed for greater impact. Essentially, what changes in the day-to-day operations can be made in order to more effectively or efficiently serve the needs of students. An action-oriented goal should start with a verb such as: improve, increase, reduce, decrease, enhance, strengthen, grow, etc. to reflect progress towards the desired result. **These broad statements may or may not have budget implications.**

Example of a goal (from IRP): *“By Spring 2023, increase understanding of the annual planning processes so that all areas and division/units have clear annual plans.”*

Goals should be formulated in a collaborative environment to facilitate alignment vertically and horizontally (see Figure 1). Goals of the division or area should be drafted in consultation with the offices and programs that will be impacted by the goal. Planning processes break down silos and encourage communication throughout ECC for greater impact.

To develop annual goals, each office/program should review: 1) the latest Program Review document, 2) annual goals of the division/unit, and 3) any available data to determine how the office/program could make the greatest impact next year. Each office/program should:

- *Reflect on strengths:* Considering current strengths articulated in the last Program Review and identified from additional data sources, how can the office/program support the annual goals of the division/unit?
- *Reflect on challenges:* Which challenges articulated in the Program Review and identified from additional data sources are the most critical to address in order to effectively contribute to the progress of annual goals of the division/unit?

To ensure annual goals are informed by data:

- If the office/program’s primary day-to-day interactions are mainly with students, use student data to identify trends and SAOs for additional insight.
- If the office/program’s primary day-to-day interactions are mainly with staff and faculty, use feedback from the office/program’s constituents or operational efficiency data.
- If the last Program Review is less than 2 years old, refer to the last Program Review report. If the last Program Review is more than 2 years old, additional data analysis for more recent insight may be helpful.

For the Student Services offices/programs, a suggested data analysis approach to inform the annual goals of the office/program is the following:

1. Refer to the last **Program Review** document. Use the analysis provided in the Program Review document as a starting point for further data analysis if needed. Start by referring to the following sections and reflecting on the following questions:

- a. "Program Overview": What major challenges did the program/office confront in the last four years? What groups of students need to be a priority during the next four years?
 - b. "Program Assessment": Using the data sources selected, review and list equity gaps within the office/program's data. Focus on examining student data by race/ethnicity in order to dismantle racism on campus.
 - c. "Service Area Outcomes Assessment": To what extent SAOs were designed to focus on students with the greatest needs?
2. Use the **Student Services Dashboard** for further insight: [Link to the dashboard](#)
- a. Scroll through the dashboard pages with special attention on the challenges or student groups mentioned in the Program Review. What outliers or trends in the data are observed? What strategies can be implemented to address these trends?
 - b. Contrast the data of specific student populations with the broader ECC student population. Where are the most significant differences in the data? What strategies can be implemented to address these differences?

Successful Course Completion

- What may be causing the decrease in successful course completion for Hispanic students who are not in a cohort?
- Are there strategies we can implement to reduce this difference?

Each office/program is not required to complete all of these data analysis steps. The office/program should complete enough analysis to identify the most significant needs that the office/program may address in the next academic year. The data may identify a variety of needs; however, no more than five goals is suggested in order to have the greatest impact. Consultation within the program/office may be needed to identify a realistic set goals that could be achieved in the next academic year.

In general, goals should be S.M.A.R.T. (Specific, Measurable, Attainable, Realistic, Time-bound).

- Ensure goals are quantified and are time-bound:
 - *Bad goal*: “Significantly increase X” (“significantly” is subjective and can’t be measured)
 - *Good goal*: “Increase retention from 36% to 40% by June 2023.”
- A good goal should answer: How much? By when? Goals may be quantified by one of the following metrics:
 - Time – e.g., a decrease in time required to provide a service
 - Percentages – e.g., an increase in the percentage of students who ____
 - Numerical count – e.g., number of courses that ____
 - A specific accomplishment is used to demonstrate that a goal has been accomplished (e.g. install new software, develop an updated syllabus, create a framework to improve coordination, etc.)

As with any of the planning processes within ECC, the activities involved in the annual planning process are cyclical. After these activities have been implemented, an assessment is needed to determine to what extent the goals have been achieved. The 2022-23 annual goals should be established with the expectation that assessment of their progress will be necessary in subsequent years.

Metrics are used to track progress towards achieving a goal. How will programs and offices know the goal has been achieved? Most action-oriented goals should be bound by a baseline and target. What is the current state (baseline) and what can each office/program reasonably achieve in the next year (target)?

While metrics are usually quantitative, some goals may be linked to the successful completion of a project. In these cases, the metric is a qualitative achievement.

Example of a quantitative metric: *“Percentage of office/program managers who participated in the annual planning training who are comfortable articulating clear goals for their office/program.”*

Example of a qualitative accomplishment: *“Materials and templates for the annual planning training were developed for all planning levels.”*

Actions are projects or tasks to complete in order to progress toward desired goals. Each goal could have one or multiple actions, although no more than three actions is recommended for the greatest impact. For example, actions could include updating procedures in order to contribute to the goal of decreasing the time required to provide a service. An action could also include establishing equity-based teaching practices in order to contribute to the goal of creating an equity-minded classroom environment.

Example of a goal: *Decrease the time required to provide a service to students*

Related action: *Update procedures to streamline services to students*

Example of a goal: *Decrease course withdrawal of Black/African-American students*

Related action: *Establish processes to better address the challenges that contribute to the withdrawal of Black/African-American students*

Example of a goal (from IRP): *“By Spring 2023, increase understanding of the annual planning processes so that all areas and division/units have clear annual plans.”*

Related action: *“Provide training to equip new deans and directors to lead the annual planning process within their division/unit or office/program.”*

To ensure that there is a clear connection between the action and the goal, ask *what are the results of the action* and *how do these results support the goal?* In the example from IRP above, the action (providing training) will contribute to the goal (increase understanding of the annual planning process).

Resources are assets needed to achieve the goals (e.g., dedicated staff for the project that contributes to the goal, access to new software/hardware/equipment).

After determining what actions are needed to achieve the goals for the next year, describe what resources are needed to accomplish these actions. These resources may be financial or non-financial and may be existing or new resources. **Some annual goals may not need additional funding.** The textual description of the resource requirements will inform the funding request process if a budget augmentation is needed.

If a budget augmentation is needed, reflect on each of the following types of resources: a) staffing, b) technology/software, c) instructional equipment, d) non-instructional equipment, e) furniture, f) facilities, and g) contracts/services/memberships/travel and conferences.

Example of resource requirements: *“Additional online team collaboration tools and hiring an additional staff member to coordinate and facilitate the training.”*

Budget augmentation requests for operational needs do not need to be associated with an annual goal since operational needs are addressed by the budgeting process, although the annual planning and budgeting processes occur in parallel.

For budget augmentation requests that do support an annual goal, the rationale should include:

- How will this funding request support the annual goals of the division and/or program?
- If applicable, what rationale for the funding request was provided in the last program review (refer to the text from program review)?
- If applicable, how does the funding request support the institutionalization of Guided Pathways?
- If applicable, what problem or need does this funding request help resolve? Who is impacted by this problem (entire College, specific division or program)? How long has this problem/need been occurring?

The funding needs of the offices/programs would inform the funding prioritization conversations at the division/unit and area levels. Thus, as annual plans and funding priorities are cascaded up from offices/programs to divisions/units and from divisions/units to areas, there are intentional opportunities to confirm that the annual plans and funding allocations are fully aligned throughout the institution.