



MERRITT COLLEGE

INTEGRATED PLANNING GUIDE

# JULY

## **PHASE I BUDGET PREPARATION**

- President's cabinet to review loaded budget(s) and begin budget transfers to align with Phase II submission and Phase III modifications.

## **PROGRAM REVIEW/ANNUAL PROGRAM UPDATES (PR/APU) TEMPLATE REVIEW**

- Director of Research to continue reviewing previous years templates (instructional, student services, administrative units) and modify if necessary. Using revised templates, create prepopulated documents for distribution to each department, service and unit area.

## **FALL PLANNING SUMMIT PREP (towards months end)**

- Director of Research along with the President's Office, OI, VPSS and VPAS Offices to schedule weekly meeting dates to review agenda, plan activities and identify any documents needed. *Note: It is advised to meet once per week until one week after September summit to include debriefing meeting.*



## AUGUST

### ***PARTICIPATORY GOVERNANCE***

- *All elected chairs and active members of participatory governance to engage in training on effective meeting management and overview of PG handbook which includes goal setting, membership, responsibilities, etc.(date of training to be held on Flex or within the first week of the semester).*
- *Governance calendar to be published.*

### ***MERRITT'S ADMINISTRATIVE PROCEDURES OVERVIEW***

- Executive Cabinet to share established administrative procedures with campus community via Flex presentation or within President's address to college.

### ***DIVISION/DEPARTMENT MEETINGS***

- All division deans and department chairs to incorporate discussion regarding assessment (with an emphasis on PLO's) at Division/Department meetings held on Flex.

### ***PHASE I BUDGET PLANNING - PR/APU KICK-OFF***

- 8-week engagement (date determined by Academic Calendar)
- Initial notification shared at Flex or within President's welcome back communication.
- Budget Development Template to be included in PR/APU.
- VPAS to provide current year budget allocation and additional budget timelines to cost center managers, department chairs and program leads.

# SEPTEMBER

## **FALL PLANNING SUMMIT** (1<sup>st</sup> or 2<sup>nd</sup> Friday of September 9a-3p)

- Review Data for the Institutional Set Standards – mark discussion for any needed change to be addressed with the IEC and Academic Senate.
- Review of College Strategic Goals ( should modifications to existing goals need to be made, the planning summit should address this and further its efforts throughout the academic year.) *Note: Adoption of existing or modified goals to be made at the Spring Evaluation Summit.*
- Assessment (with an emphasis on ILO's) – **SLOAC** to present. Review Strategic Planning objectives and activities for the year identified at the prior year's Spring Evaluation Summit. (review of EMP and SEP)
- Review of Integrated Planning and Budgeting Cycle

*Note: This is the first of three summits for the academic year; (1) Planning Summit – September, (2) Mid-Year Summit/Retreat – February, (3) Evaluation Summit – May.*

## **PARTICIPATORY GOVERNANCE**

- *Each Participatory Governance Committee to set 1-2 goals that align with college strategic goals at the start of their first meeting.*
- *Committees to begin reviewing by-laws. Note: Any revisions to by-laws must be made to the senates and the College Council.*

## **PR/APU TRAINING/CHECK-IN**

- Training to be provided (preferably within the first 2 weeks of September). Individualized trainings/check-ins may be necessary by the Director of Research, VPAS, SLOAC Chair/Coordinators, and Curriculum Committee Chair. These trainings to be scheduled at their convenience.
- Dean's and VP's to schedule check-ins with their department chairs, programs directors to provide clarity on all sections (including budget and staffing templates)



# OCTOBER



***PR/APU DEADLINE*** (date determined by Academic Calendar)

- Additional training to occur within first week.
- All department chairs, program directors, and administrative leads to submit completed PR/APU to central repository that will be accessible to validation teams and managers. *Note: All VP's/Deans to track submitted PR's using identified spreadsheet housed in central repository.*

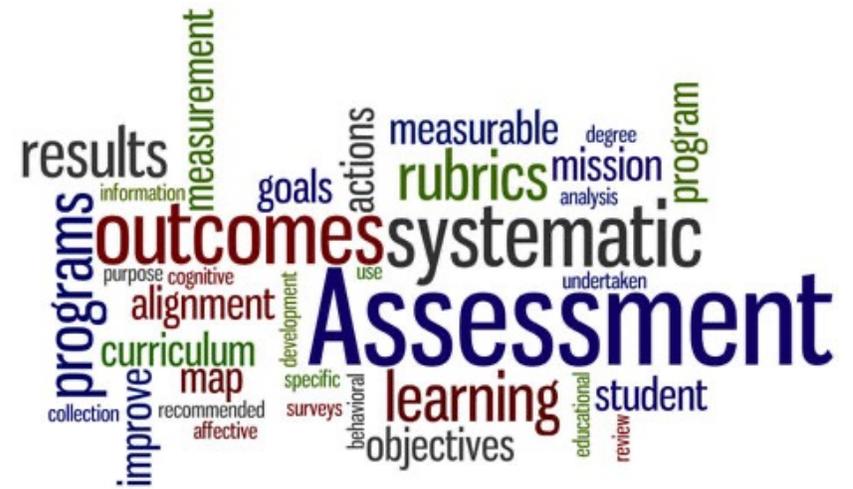
***PR/APU VALIDATION***

- Submitted PR's/APU's to be validated by ***SLOAC, Curriculum Committee, IEC*** using developed rubrics. (last 2 weeks of October)

# NOVEMBER

## *PR/APU REVIEW*

- Deans and VP's to review results of all validations provided by *SLOAC*, *Curriculum and IEC* (to occur the first week of November)
- Deans and VP's to schedule meetings with department chairs/program directors to ensure completion of template and review/discuss validation outcomes, operational budget and resource requests including staffing. (mid November)



# DECEMBER



## ***PR/APU's FINALIZATION***

- Deans and VP's to continue meeting with department chairs,/programs directors. All revisions of PR/APU's to be submitted by second week of December.
- Deans and VP's to sign-off on all validated and submitted PR/APU's. *Note: If incomplete and/or have not passed validation – PR/APU will not be considered in next steps of resource prioritization.*

## ***RESOURCE REQUESTS - COMPILATION***

- Director of Research to extract all resource requests from executed PR/APU's and compile into master file.
- All personnel hiring requests to be filtered and provided to **CDCPD/MCAS** and **MCCS** for prioritization.

## ***MID-YEAR PLANNING SUMMIT PREP (towards months end)***

- Director of Research along with the President's Office, OI, VPSS and VPAS Office to schedule weekly meeting dates to review agenda, plan activities and identify any documents needed. *Note: It is advised to meet once per week until one week after February summit to include debriefing meeting.*

# JANUARY



## ***PRIORITIZATION OF RESOURCE REQUESTS***

- Director of Research to send soft copy of master file (sorted by cost center) to all managers.
- Cost center managers to score only the resources identified under their respective cost centers using developed rubric.
- Scored resource requests to be sent back to Director of Research to incorporate into Master file. Managers to deliberate on full list of prioritized resources for further scoring refinement.
- Once managers finalize list, Director of Research sorts list by rank and sends to the chairs of the ***CFC, MTC*** and ***CBC*** for committee review and recommendations to the ***College Council***. As a courtesy, ***CDCPD*** should receive a copy for informational purposes only. *Note: This step should occur by the last week in January to provide adequate time for committee members to review the list prior to their calendared meeting in February.*

# FEBRUARY

## **MID-YEAR SUMMIT/RETREAT** (1<sup>st</sup> Friday 9a-3p)

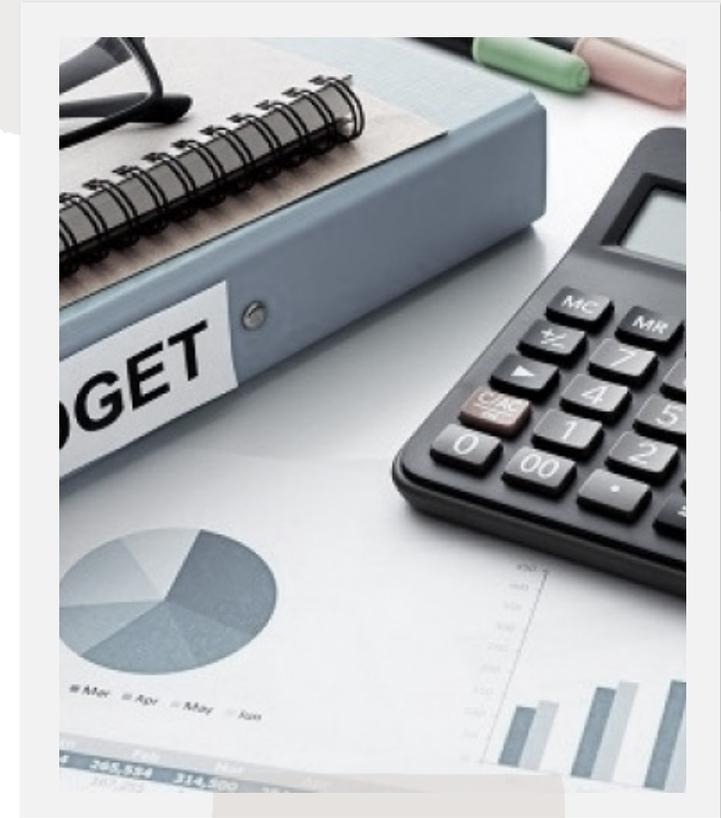
- Check-in on achievement of goal objectives and activities as outlined in the Fall Planning Summit.
- Institutional Set Standards (ISS) – Final college-wide adoption of ISS's.
- Accreditation check-in (tracking our progress)
- Guided pathways
- Equity – activities, support, trainings, progress, etc.

## **PRIORITIZED RESOURCE REQUESTS**

- Prioritized Resource Request List to be placed on the agenda of the **CFC**, **MTC**, and **CBC** for further review and input.
- **CDCPD/MCAS and MCCS** to prioritize and approve hiring lists.
- **College Council** to review and approve Prioritized Resource Requests List. Prioritized Hiring Lists to be forwarded to **Council** as an informational item. All prioritized request lists to be sent to President for further review and approval.

## **PHASE II BUDGET DEVELOPMENT**

- VPAS to be notified by District on the status of current expenditures, state and county estimates of revenues, site “based budget” allocations, and targets for the increases or decreases.
- VPAS to share budget assumptions and current year expenditures to cost center managers and the **CDCPD** chair for distribution to department chairs and program directors.



# MARCH



## ***PHASE II BUDGET DEVELOPMENT continued...***(Fund 1)

- VPAS to attend March **CDCPD** meeting to answer any questions regarding budget assumptions, current year expenditures and budget templates.
- Managers to refer to PR/APU for base operational costs and meet with respective staff and faculty to confirm budgets based on January budget proposal (within first two weeks of March).
- VPAS to summarize all developed budget requests and present to the **CBC** and forwarded to **College Council** for review and approval. Council to recommend to College President for further review and final approval.

## ***INSTITUTIONAL SET STANDARDS***

- Final adopted ISS's to be vetted through Academic Senate, IEC and College Council.

## ***SPRING EVALUATION PLANNING SUMMIT PREP (towards months end)***

- Director of Research along with the President's Office, OI, VPSS and VPAS Office to schedule weekly meeting dates to review agenda, plan activities and identify any documents needed. *Note: It is advised to meet once per week until one week after May summit to include debriefing meeting.*

# APRIL

## **PHASE III BUDGET ADJUSTMENTS**

- President to review tentative Fund 1 budget recommendation made by **College Council**.
- President to forward finalized budget to VC of Finance for review at last **PBC** and **PGC** meetings in April.
- Cost Center Managers and **CBC** to review all sources of funding to support resource requests and any modifications to Fund 1 budget.

## **INSTITUTIONAL SET STANDARDS**

- ISS'S due to the ACCJC within first two weeks.

## **ASSESSMENT**

- Director of Research to send **Participatory Governance** survey to all Merritt within the first week of April.
- Survey to conclude by the third week of April to compile results.
- Director of Research to share results to all Merritt and to participatory governance committee chairs. Results to be reviewed at Evaluation Summit and at all May **Participatory Governance** meetings.

## **SENATE ELECTIONS**

- Election of senators to be held for **ASMC**, **MCAS** and **MCCS**.





## MAY

### **SPRING EVALUATION SUMMIT**

- Review and discuss *Participatory Governance*, Assessment, PR/APU and IPB survey results.
- Evaluate the accomplishment of the college's strategic goals and student equity goals. Modify targets, objectives and activities as necessary.
- Assessment (with an emphasis on ILO's) – *SLOAC* to share outcomes of all assessment.

### **PHASE III BUDGET ADJUSTMENTS**

- Tentative Fund 1 budget to be presented to the Board no later than the last meeting in May.
- Cost Center Managers and *CBC* to continue looking at all sources of funding to support prioritized resource requests and further refinement of the Fund 1 budget.

### **PARTICIPATORY GOVERNANCE**

- *All PG committees to elect new chairs for the next academic year.*
- *Each committee to evaluate their committee goals as identified in their September meeting. Committees should reflect on PG survey results.*
- *Membership list to be compiled by senate presidents and uploaded to central repository including sub-committees of the Academic Senate i.e. CDCPD, CC, SLOAC, PDC)*



# JUNE

## ***ADMINISTRATIVE PROCEDURES REVIEW***

Administrative Unit to review all developed college AP's to

1. Ensure they are understood;
2. Modify if necessary

## ***PHASE III BUDGET FINALIZATION***

- Cost center managers to engage in Budget Planning session to further review feedback from April survey and May evaluation summit. Managers to assess and evaluate the process as it relates to the AP and IPB Cycle to gather and finalize Phase III adjustments.

## ***PR/APU TEMPLATE REVIEW***

- Director of Research to review feedback received from Evaluation Summit and modify if necessary.