

Columbia Gorge Community College

# Plan-To-Plan

The Plan for developing, communicating and using the College's Strategic Planning System

Version 2.3

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CONTENTS

Purposes of the Strategic Master Plan ..... 3

Operational System and Strategic Master Plan structure ..... 3

Outcomes and expectations ..... 4

Process model ..... 7

Planning responsibilities ..... 10

Planning organizational structure ..... 10

Planning decision structure and process ..... 12

Calendar and milestones..... 13

Alignment ..... 17

Tools ..... 17

Usage ..... 17

Addendum (Change log) ..... 18

OVERVIEW

The Plan-To-Plan document outlines the details involved in CGCC’s Strategic Planning Process. The content describes the purpose, areas of focus, expectations, methods of communication, schedule of events, and usage.

### 1. Purposes of the Strategic Master Plan

The Strategic Master Plan (SMP) provides a strategic roadmap for the success and focus of CGCC meeting its Mission. The plan serves as documentation and as a communication tool for communicating goals, responsibilities and priorities.

The process of developing CGCC's budget and SMP, align the strategic goals to key priorities in our Core Themes and within the Accreditation Standards.

### 2. Operational System and Strategic Master Plan structure

The college breaks down its operations into 9 Key Function Areas (KFA). Each KFA has an assigned Lead. Each area produces goals and plans related to their area. Goals for a KFA that are larger in nature, or more global in their effect, are placed in the college's Strategic Plan. Goals that do not fit in any single KFA, are placed in the Institutional Wide Strategic Goals, or KFA 0.

- a. Institutional Wide Strategic Goals (KFA 0)
- b. **KFA1-Educational Programs and Services:** CGCC will deliver quality educational opportunities that foster life-long learning for our communities
- c. **KFA2-Students:** CGCC will focus on student development services that enhance lifelong learning by facilitating access to college programs, supporting and recognizing student progress, providing opportunities for students to participate in the growth of the college, celebrating diversity, and promoting achievement of educational goals.
- d. **KFA3-Faculty and Staff:** CGCC will employ and develop a qualified faculty and staff and foster a supportive working and learning environment.
- e. **KFA4-Community:** CGCC will develop and maintain strong, collaborative partnerships and relationships within our communities.
- f. **KFA5-Leadership, Planning, and Evaluations:** CGCC will provide governance and administrative structures through innovative leadership and ongoing planning and evaluation.
- g. **KFA6-Finance:** CGCC will build the institution's financial capability through sound planning and effective use of fiscal resources.
- h. **KFA7-Operations and Sustainability:** CGCC will provide efficient operational processes which support current organizational needs and directions.
- i. **KFA8-Technology:** CGCC will provide the technology and support to optimize the College's teaching, learning, communication and productivity.
- j. **KFA9-Facilities:** CGCC will provide appropriate institutional facilities which support the achievement of the institution's goals.

## PLAN TO PLAN

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### 3. Outcomes and expectations

- a. What are the expectations of this plan?
  - i. Linked to:
    1. Mission
      - a. Via Standard(s) and Core Theme(s) – discussions and plans revolve around fulfilling the Mission via Accreditation Standards (including Department Reviews covering Standard Two), and Core Theme performance analysis.
    2. Budget – The planning cycle creates the linkage from plan to budget. As outlined later in this document the planning cycle defines time for planning, budget building based on plans being developed, approving the requested budget, and then revising the Strategic Master Plan as the budget approval allows.
  - ii. Updated regularly
    1. New Goals are posted to the plan once a year, after budget approval
    2. New Goals may be added out of cycle as approved by the President
    3. Goal status updated monthly
  - iii. Communicated
    1. To the Quality Council – monthly
    2. Posted on the web – update monthly
    3. Aspects of the Plan, or the planning process will be scheduled at All Staff Training – once a year
    4. Discussed regularly at individual KFA meetings – at least twice a year
    5. Provide Plan & planning information to the Instructional Department Chairs
      - a. Department Chairs will then communicate to Faculty
    6. Presented to the College Board – once a year
    7. KFA Leaders present updates to the President at the weekly Executive Leadership Team meetings
  - iv. Inclusive – Feedback channels for :
    1. All of the communications listed above
    2. Via a College web form
    3. External entities via AMP analysis of assets, opportunities, challenges, and aspirations meetings
    4. Accreditation Self Evaluation
    5. Facilities Master Planning and various other College Master Plans
    6. Various Community Outreach activities

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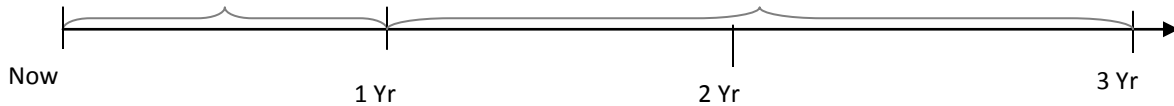
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b. What is included in the plan?

Each KFA may have many activities and goals. The majority of these items should be included in their department review or operational plan. Other goals are new and strategic in nature. Some of the KFA goals have a greater impact to the college community at large. The Strategic Master Plan includes these KFA strategic goals as outlined below, as well as large, overarching goals that do not fit under any single KFA.

- i. The Plan shall include “**strategic**” goals only. Strategic goals are defined as College goals that are:
  1. *New*
  2. *Changes* to existing processes
  3. *Stopped*
- ii. General guidelines for including a Goal in the Strategic Plan
  1. Cost is over \$5,000
  2. Takes over 40 hours of work time
  3. Involves multiple departments
  4. A Goal in the Strategic Plan shall include a Charter # for reference to detailed information defined in the Charter
  5. Approved by the President and included in the budget
- iii. A plan entry will include enough information to follow the S.M.A.R.T. goal setting strategy (Specific, Measurable, Attainable, Relevant, Time-Based)
- iv. Completed and postponed goals will be removed from the plan after 6 months
- v. Goals will be time scoped between one to three years into the future

**Figure 3.1**



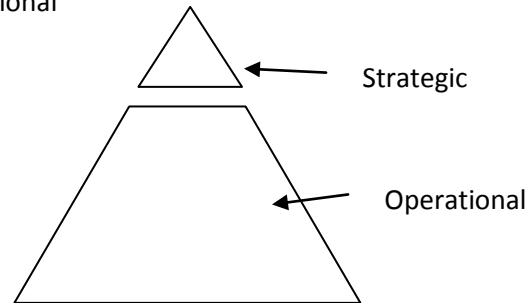
## PLAN TO PLAN

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- i. Separate documents will contain Operational Plans per KFA
  1. Operational Plan contains
    - a. What the College does on an ongoing basis
    - b. *Master Plans/Department Reviews from all Departments*
  2. The Strategic Plan contains the “strategic” items that describe activities that are New, Changed, or Stopped
  3. Strategic items have an established start and end date. Reaching the end date and finishing the Strategic actions complete that Strategic item. Completing some Strategic items will, by default, create an operational process. These new operational process(s) will then be documented in the Master Plan and/or Department Review. An example of this would be a Strategic item that defines the building of a new building. Then once the building is completed, the Strategic item is done, and the operational items of maintaining the building will be defined.

**Figure 3.2**

Most of the activities at the College are Operational



### 4. Process model

- a. Where are we gathering data from?
  - i. Academic Master Plan(Analysis of assets, opportunities, challenges, and aspirations)
    - 1. Internal & External Communities of Interest
    - 2. Students, Staff, Faculty, Board, Community, Alumni
  - ii. Facilities Master Plan
  - iii. Core Theme measures
  - iv. Accreditation Self Evaluation & Recommendations
  - v. Various committees and working groups
  - vi. Department Reviews
- b. Who primarily processes the data to be integrated into the plan
  - i. Institutional Assessment Committee
  - ii. Key Function Area Leads
  - iii. Quality Council
  - iv. Executive Leadership Team
  - v. President
  - vi. Board of Education
- c. What & how will information flow?
  - i. Yearly cycle based on the Communities of Function
    - 1. Reference existing Mission, Vision and Core Themes (objectives & measures)
    - 2. Analyze what we want to do, based on data, and compared to our capacity (budget planning)
      - a. Weekly ELT meetings
      - b. Monthly Quality Council meetings
      - c. Monthly financial statements
      - d. Yearly Department Reports
    - 3. Planning and Implementation
      - a. Curriculum Development
      - b. KFA planning
      - c. Budget building & adoption
      - d. Posting to Strategic Master Plan
      - e. Implementing plans
    - 4. Review Effectiveness & Improvement - Gather data and start strategizing on ways to improve (create recommendations for new goals)
    - 5. Mission fulfillment – analysis of data as per our goals
    - 6. Cycle back to #1

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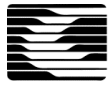
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- ii. 2-3 year cycle based on the Communities of Interest
  - 1. Perform Internal / External Analysis
    - a. Board Assessment
    - b. Accreditation Self Evaluation
    - c. Academic Master Plan
      - i. Analysis of assets, opportunities, challenges, and aspirations
  - 2. Validate the College's
    - a. Values
    - b. Vision
    - c. Mission
    - d. Core Themes
      - i. Objectives
      - ii. Indicators
  - 3. Validate Strategic Directions
    - a. Institutional Strategic Goals
    - b. Key Function Areas



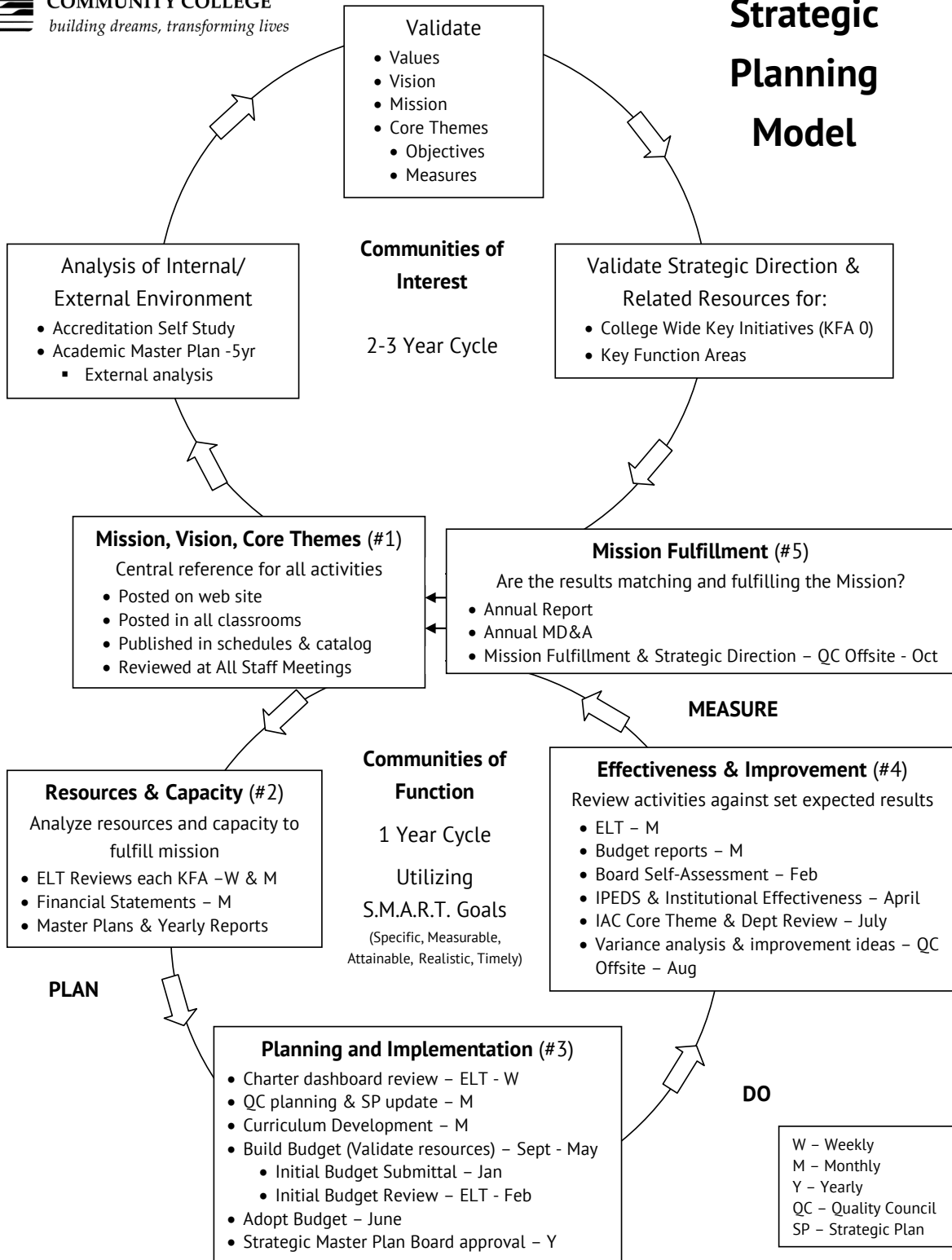
# PLAN TO PLAN

Figure 4.1



**COLUMBIA GORGE  
COMMUNITY COLLEGE**  
*building dreams, transforming lives*

## Strategic Planning Model



### 5. Planning responsibilities

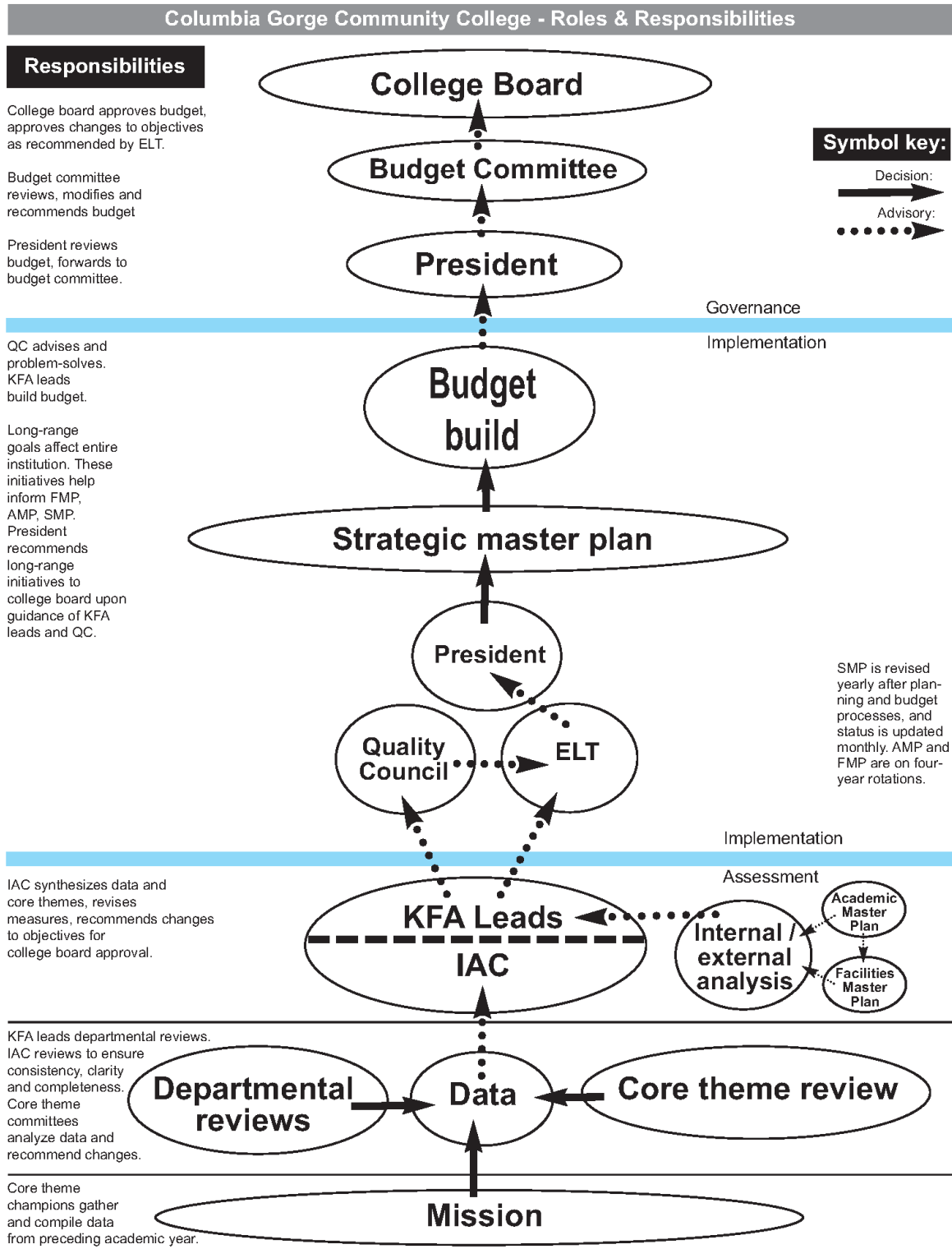
- a. Planning Facilitator: B.Bohn
- b. Planning detail: Each KFA Lead, College Wide Goal Leads
- c. Core Theme Leads
  - i. Validate that related indicators are acquired and posted
- d. Institutional Assessment Committee
  - i. Gather Core Theme Indicator data
  - ii. Present data to ELT & Quality Council for analysis on what actions to take
- e. Analysis of assets, opportunities, challenges, and aspirations – included in the Academic Master Planning process
- f. Plan communication:
  - i. Broad communication: D.Spatz
  - ii. Departmental communication: Each KFA Lead and QC members

### 6. Planning organizational structure

- a. Various teams and committees provide feedback to their related KFA
- b. Each KFA and the Quality Council provide input & feedback to the ELT
- c. The ELT provides feedback and input to Dr. Toda for final approval
- d. The President is directed to formulate such administrative procedures appropriate for the implementation of policies adopted by the Board and necessary for the consistent operation of the district.

# PLAN TO PLAN

**Figure 6.1**



### 7. Planning decision structure and process

- a. The decision structure and process follow the planning organizational structure
  - i. Data is acquired from a variety of sources including, but not exclusively, the Academic Master Plan, Facilities Master Plan, Internal & External scans & analysis, and Core Theme data
  - ii. Ideas are gathered from various teams & committees
  - iii. Team feedback goes to the related KFA for group or KFA tuning and approval
  - iv. The KFA leads meet as a group (ELT) with the President to recommend final approval/denial
  - v. KFA lead is responsible for communicating the final approval/denial decision back to the department, team, and/or committee
- b. Standard yearly procedure for posting a Goal to the Strategic Plan
  - i. Develop the plan for the Goal in the local group/department
  - ii. Document the Goal in the Charter System
  - iii. Acquire approval for the Charter from the President
  - iv. Submit any related budget requests
  - v. Gain approval for submitted budget requests
    - 1. President
    - 2. Budget Committee
    - 3. Board of Education (Final)
  - i. Post to the Strategic Plan(June Revision)
- c. Exception to posting a Goal to the Strategic Plan
  - iii. Develop the plan for the Goal in the local group/department
  - iv. Document the Goal in the Charter System
  - v. Acquire approval for the Charter from the President
    - 1. Must verify that funding exists for the new Goal
  - vi. Post to the Strategic Plan

## PLAN TO PLAN

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### 8. Calendar and milestones

- A. Monthly ELT & Quality Council review & update Plan and aligns activities
  - B. **August** – Budget Assumptions and Effectiveness & Improvement activities (Quality Council)
    - i. Known detail:
      - 1. Last year’s actual budget figures
      - 2. 2 year average of account line actual
      - 3. 2 year accounts maximum spent amount
    - ii. Expected Outcome
      - 1. Updated current year budget assumptions
      - 2. Data distribution (binders)
      - 3. Focused idea generation to provide input for Effectiveness & Improvement
      - 4. (subsequent meetings communicate and tune ideasthat may be added to future plans)
  - C. **October** – Mission Fulfillment review, Strategic Direction & Next year planning activities (Quality Council)
    - i. Known detail:
      - 1. Last year’s actual budget figures
      - 2. 2 year average of account line actual
      - 3. 2 year accounts maximum spent amount
    - ii. Expected Outcome
      - 1. Mission Fulfillment status
      - 2. Core Theme indicator update
      - 3. Review and determine new college wide strategic goals
      - 4. Start tuning the plans that feed the budget
  - D. **November to April** – Budget build
    - i. Build next year plans
    - ii. Attach a budget amounts to the plan specifics
    - iii. Start budget request with the past 2 year greatest actual spent amount(Subject to change)
    - iv. Adjust down budget items that no longer need the starting funding level
    - v. Request additional funding via request attached to a charter
    - vi. Requests are approved by the President to become new requested budget amounts
  - E. **January 25<sup>th</sup>** – initial budget submittals due
  - F. **February**–5,000 ft.ELT & Quality council - One or Two day planning session
    - i. Known detail:
      - 1. Same as November meeting PLUS:
        - a. Current year 50% actual spending
    - ii. Expected Outcome
      - 1. Communicate Updated Plans
      - 2. Review budget variances based on 50% mark
      - 3. Align the Plan to NEXT year’s Budget requests
        - a. Taking into account
          - i. The Strategic Master Plan
          - ii. Last year’s actual budget amounts
          - iii. Average of the last 2 years actual
          - iv. Maximum spent in last 2 years
          - v. New plans & first pass at requested budget
- G. **March & April** – tune & prioritize budget requests
  - i. Analyze total budget with all approved requests
  - ii. If there is not enough budget, strategically review requests to balance budget

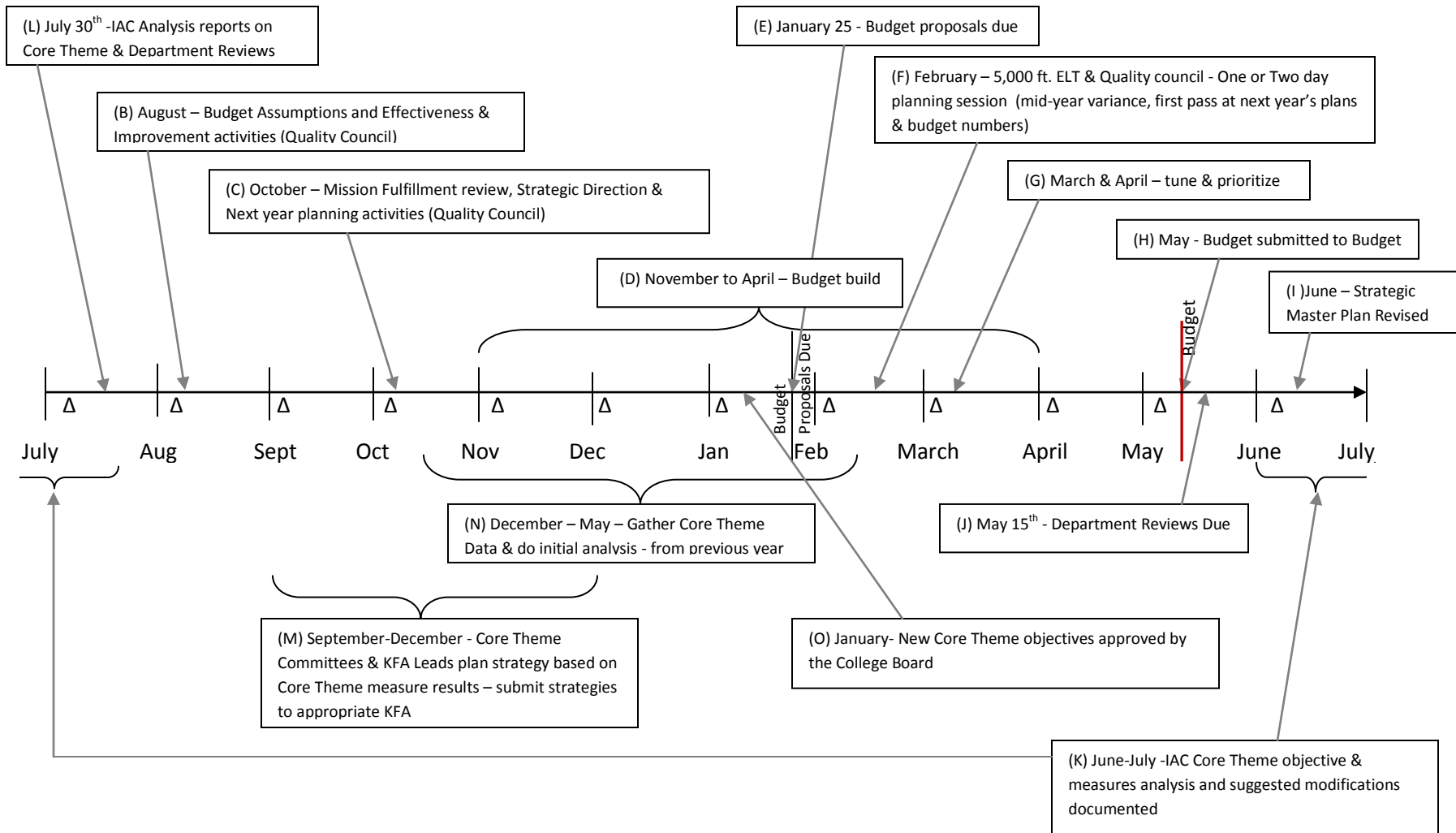
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- H. **May** - Budget submitted to Budget Committee
- I. **June** – Strategic Master Plan revised
- J. **May 15<sup>th</sup>** - Department Reviews Due
- K. **June-July** -IAC Core Theme objective & measures analysis and suggested modifications documented
- L. **July 30<sup>th</sup>** -IAC Analysis reports on Core Theme & Department Reviews
- M. **September-December** -IAC Core Theme Committees & KFA Leads plan strategy based on Core Theme measure results – submit strategies to appropriate KFA
- N. **December – May** – Gather Core Theme Data& do initial analysis from previous year
- O. **January**- New Core Theme objectives & measures approved by the College Board

# PLAN TO PLAN

**Figure 8.1**



Δ (A) Monthly ELT & Quality Council review & update Plan and align activities

## PLAN TO PLAN

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### 9. Delineate how organizational entities will align with each other

- a. Monthly ELT and the Quality Council will review current status of the Strategic Master Plan by KFA order

### 10. Delineate planning tools to be used

- a. Word -Strategic Plan Word Document
- b. Charter System – Goal/Project definition, assign action items, document costs, track progress and budget development
- c. Excel – Final budget and future trending analysis

### 11. Detail how the plan will be used

- a. Goals officially revised yearly (unless approved by the President)
- b. Updated monthly for status changes
- c. Referenced monthly by the President, ELT & the Quality Council
- d. Reviewed once a year at the All Staff Training meeting
- e. Reviewed 2 times a year by each KFA Department
- f. Referenced for budget requests and approvals
- g. Referenced for any significant New, Changed or Stopped proposal

## Addendum

### Change Log:

#### **February 2013 V2.3**

- Insert most recent Planning Model 02/2013
- Index and heading corrections

#### **January 2013 V2.2**

- Format changes – bolding
- Slight wording changes for clarity & improved description of strategic item finishing and becoming operational

#### **November 2012 V1.7**

- Insert IAC Core Theme Data collection Department Review due date, and IAC analysis reporting in the planning timeline
- Change timelines January meeting to February to follow Instructions January planning

#### **October 2012 V1.6**

- Insert the 2012 Planning Model
- Change Planning Focus Group plans to represent the Quality Council activities
- Update planning timeline to represent the new planning/budget process
- Minor text corrections

#### **April 2012 V1.5**

- Change Key Focus Areas to Key Function Areas.

#### **August 2011 V1.4**

- Incorporated notes from the ELT August 2011 off site planning meeting.

#### **July 2011 V1.3**

- Incorporated Planning Model 2011

#### **January 2011 V1.2**

- Moved to 2011 folder
- Removed yellow highlighted changes
- Added Version to title page

#### **December 2010 V1.2**

- Added:
  - Figure labels to all figures
  - Definition of SWOT
  - General guidelines for what goes into the Strategic Plan
  - Board involvement
  - KFA's role in planning structure and process