Integrated Planning Process

The integrated planning process incorporates three broad categories of planning, 1) the strategy map and balanced scorecard initiatives, 2) operational project planning, and 3) the operating budget.

Strategy Map and Balanced Scorecard

SJVC's quantified vision is the driver of the strategy map and balanced scorecard. Strategic objectives are defined by the four perspectives (Our Success, Student Success, Quality Education, and Employee Success). The balanced scorecard further defines these objectives into measures with current values and targets. The initiatives used to close the gap (current vs. target) are captured in the institutional Project Management application[1].

Operational Project Planning

Operational projects primarily initiate from three areas: Academics Affairs, Information Systems, or Facilities and Equipment.

Academic Affairs

The Academic Affairs department administers multiple that integrate stakeholder input into the project planning process. This includes: Program Review (PR), Program Improvement Plans (PIP), Course Improvement Plans (CIP), and Textbook Improvement Plans (TIP). College policies and procedures detail stakeholder input required for each. If a project is created resulting in an additional expense to the college, a purchase proposal is created by the Academic Affairs department. The proposal is routed to the appropriate staff for input and supporting documentation. For example, new classroom software will be reviewed by the Director of Network Operations and the Regional Network Administrator for compatibility issues.

Information Systems

Information Systems projects include hardware and software used within administration, classrooms, and other student services areas. Networking hardware is managed by the Central Administrative Office (CAO), and projects are presented by the Director of Network Operations. Local computers are managed by Regional Network Administrators or by the CAO Network team. Purchase proposals are created for new or replacement equipment or network software.

Course software applications are reviewed and recommended during the Academic Affairs Program Review cycle or through a program or course improved plan. The recommendation is forwarded to the information systems department for a compatibility review. Institutional software is recommended by the initiating department, reviewed by the Director of Information Systems for capability issues. A purchase proposal would then be created associated with the Course Improvement Plan. Purchase proposals are also created for new or replacement equipment or network software.

Facilities and Equipment

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[1] InfoZone>Links>Project Management. SJVC uses a third party application, Teamwork, for its project management system. This secured web based application has a unique domain for SJVC and is administered by the Chief Financial Officer and Director of Information Systems.

Facilities and equipment planning incorporates current, and future student census, space utilization, growth and development, infrastructure renovation requirements, and planned equipment obsolesce. All facilities and equipment projects are coordinated by the Director of Real Estate Development and the Director of Purchasing and Facilities. Project requests are generated by either the CAO or Campus operations.

CAO requests are usually generated from information received from the Executive Council, are reviewed by the CFO's team (Accounting, Information Systems, Purchasing, and Facilities), and a project is identified and prioritized. Campus-specific requests are approved by the Campus President and sent to the CFO's team. Projects initiated from the Help Desk[2] ticketing system, and outside entity for compliance, or resolution to safety concerns are also reviewed by the CFO's team.   Purchase proposals are prepared for projects requiring non-SJVC resources or external expenses.

SJVC growth and development strategy encompasses program creation, program migration, new campus locations, as well as acquisitions and is managed by the Director of Growth and Development. The institutional projects go through five phases[3], and each phase is approved by the Senior Management team before the next phase. The project is entered into the project management system at the execution stage.

Operational Budget

The operating budget is developed based on anticipated student population, revenue projections, instructional expenses based on student populations and course offerings, student services, and administrative overhead expenses. These projections are based on historical expenditures and specific identification methods.

Purchase Proposal/Requests Approval Process

The appropriate Executive Council Member[4] approves purchase proposals/requests generated by the above areas. The initiatives/projects are routed to a small group of Senior Managers[5] that are responsible for the review and prioritization of the proposals. The proposed initiative/project list is then reviewed monthly by the Business Committee, and items are either approved or deferred. The Business Committee reviews financial statements on a monthly basis to ensure that current and future projections ensure compliance with all regulatory agencies. Decisions are routed back to the originating department by the Chief Financial Officer's Team. Approved items are entered into the Project Management application by the originating department.

Financial Plan

The operational budget is created to represent operations based on current and projected student population. Expenses from the above initiatives and projects are in the project management system and are tracked in the billing tab (additional supporting documentation included in the file tab) and are
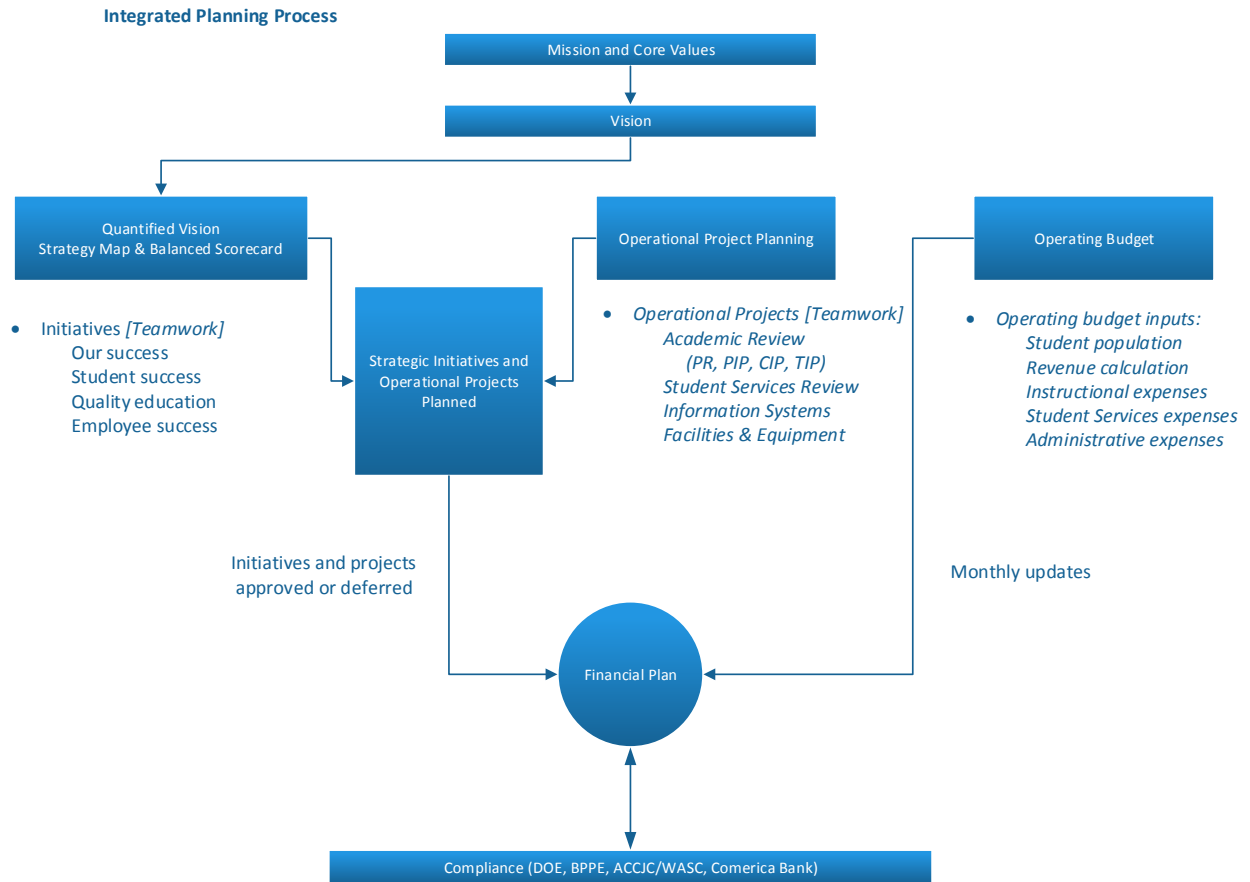
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[2] Help Desk – Service Desk Pro ticketing system for repairs and maintenance. Each location has its own queue that is monitored by local staff and by the Director of Purchasing and Facilities
[3] Exploration, Evaluation, Execution, Launch, and Operation.
[4] Senior Manager, Campus President, Corporate Director
[5] Chief Financial Officer, Provost/Vice President of Academic Affairs, Chief Administrative Office, Chief Operating Officer

incorporated into the budget to create an overall financial plan. This plan is validated to all of the compliance measures established by outside entities and internal goals. The culmination of all of these activities is a financial plan that is continuously monitored to strategic and operational plans, and compliance standards.

Integrated Planning Process

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                        ┌─────────────────────────┐
                        │  Mission and Core Values │
                        └────────────┬────────────┘
                                     ↓
                        ┌─────────────────────────┐
                        │          Vision          │
                        └────────────┬────────────┘
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| Quantified Vision Strategy Map & Balanced Scorecard | Strategic Initiatives and Operational Projects Planned | Operational Project Planning | Operating Budget |

- Initiatives *[Teamwork]*
  Our success
  Student success
  Quality education
  Employee success

- *Operational Projects [Teamwork]*
  Academic Review
   (PR, PIP, CIP, TIP)
  Student Services Review
  Information Systems
  Facilities & Equipment

- *Operating budget inputs:*
  Student population
  Revenue calculation
  Instructional expenses
  Student Services expenses
  Administrative expenses

Initiatives and projects approved or deferred

Monthly updates

Financial Plan

Compliance (DOE, BPPE, ACCJC/WASC, Comerica Bank)

San Joaquin Valley College
Project Management System

| Operational | **Strategic** |

Project	Start Date	End Date	Project Cost
Change Leadership Team			
Develop Talent Acquisition Platform	1/2/2017	12/15/2017	$ 29,423
eCourse Shopper	5/26/2017	10/13/2017	
Email Nurturing	8/7/2016	1/1/2018	
Employer Training: Setton Pistachio	4/21/2017	8/3/2018	
GnD Creation: AS to BSRT Bridge program	1/1/2015	2/28/2018	
GnD Creation: OTA Fresno	9/22/2017	11/24/2021	$ 55,195
GnD Location: Atascadero	5/3/2017	7/31/2018	$ 381,668
GnD Migration: CJ-C Temecula	8/30/2017	2/20/2019	$ 55,195
GnD Migration: DA Hesperia	6/29/2016	5/8/2018	$ 226,082
GnD Migration: ET Temecula	8/30/2017	4/29/2019	$ 55,195
GnD Migration: IMT Temecula	8/30/2017	2/20/2019	$ 55,195
GnD Migration: ST Cordova	11/9/2016	12/13/2019	$ 106,399
GnD Migration: ST Temecula	11/9/2016	12/13/2019	$ 106,399
GnD Migration: Visalia General Education Courses			
GnD: Phlebotomy	12/7/2016	10/5/2018	
Licensure: MA Certiciation Pass Rate Improvement	10/2/2017	4/2/2018	
Online Graded Orientation	2/2/2017	12/6/2017	
Online Remediation Plan	1/8/2018	4/28/2018	
Quarterly review of CAO strategic initiatives	1/1/2016	12/31/2017	
WASC Senior Initial Accreditation	3/14/2017	2/28/2019	$ 67,200
Grand Total			**$ 1,137,951**

San Joaquin Valley College
Project Management System

| **Operation...** | Strategic |

Project	Start Date	End Date	Project Cost
Admissions Implementation of VEL Live Coaching Tool	7/31/2017	2/7/2018	
Admissions marketing/brochure material redesign	11/21/2016	4/21/2017	
Board of Governors Retreat 2018	3/14/2017	2/25/2018	$ 6,000
Create Online Admissions Onboarding Process	10/2/2017	1/15/2018	
D2L Cloud Migration Implementation			
D2L Cloud Migration Planning	10/27/2017	5/28/2018	$ 576,569
Drip Marketing Email Campaigns	10/17/2017	1/5/2018	
FA/Admissions Customer Service & Process Improvement	9/26/2017	3/31/2018	
First Term Retention	8/24/2017	1/18/2018	
Forecasting Census	12/1/2017	3/31/2018	
FP - Rancho Cordova Relocation	5/26/2017	12/31/2017	$ 11,257
FP Aviation Multi Room Renovation	10/16/2017	2/2/2018	$ 17,282
FP Visalia Beautification	5/1/2016	2/28/2018	
FP: San Diego - Lease Expiration	11/17/2017	11/1/2018	$ 12,516
HES Student Profesionalism Workshops			
Implement Applicant Tracking System (ATS) - JobVite			
Information Technology online enrolling on-ground			
In-source Affiliate Internet Advertising	6/5/2017	9/1/2017	
IVR Intelligent Routing for Campuses			
Lancaster Reentry 2017			
Lead Delivery Systems and Infrastructure			
Learning Outcome Workshops	2/23/2017	3/15/2018	
Modesto Lease Renewal	12/1/2017	3/31/2018	
Recruitment and Onboarding of Faculty	7/17/2017	2/28/2018	
RN Program Handbook			
Summer 2017 TV Campaign			
Updating BoG materials	11/1/2016	5/31/2017	
YouTube and Social Media Plan 3Q17	5/29/2017	11/3/2017	
Grand Total			**$ 623,624**