DATE: October 29, 2013  
TO: Unit Managers  
FROM: Institutional Effectiveness Committee (IEC) Chairs – Lydia Gonzalez and Howard Kummerman  
SUBJECT: 2014-2015 Unit Plans

This memo will provide information on the steps to complete your Unit Plans which are due by Wednesday, November 27, 2013. Program Plans and Program Review Plans in your Unit should now be complete and submitted. The plans must be submitted for you to upload section content into your Unit Plan.

The following information will help as you proceed with your Unit Plans.

- The first step in creating your Unit Plan will be to log in to the planning software and either roll over a previous plan or create a new empty plan template. Think about how you would like to manage your Unit Plan – you may wish to roll over the previous plan for general sections and then delete content and upload from Program Plans as necessary to include new information such as goals and objectives. Once you upload and modify the Unit goals, please indicate in the goal box which institutional goal it falls under. Remember, the objectives carry forward any resource allocation requests.

- Once the software template for your 2014-2015 plan has been created, the IRP office will place your Unit level data into the plan. Data is also available on the public drive here P:\Planning\Unit Plan Data 2014-2015 and on the IRP Channel of the employee table in Access Rio Portal. Please include faculty position requests in the Unit Plan by November 1. Data necessary to answer questions for these requested positions will be populated in the Unit Plan.

- The second step in creating your 2014-2015 Unit Plan will be to create a plan team. Your plan team will help to discuss the important aspects of the Unit and formulate the plan content. More information on creating a plan team can be found in the Planning Supplement located here – How to Create a Plan.

- A variety of resources are available to help you complete your Unit plan.
  - Institutional Planning Help Line 562-463-6644
  - Training materials and other resources – Click Here

- Program Review Plans were created in the same template as the Program Plans. You may upload the contents just as you would with any Program Plan. Once the Program Review meetings are complete, the committee will create and insert the Program Review Executive Summaries into the plans. The Program will then create and enter a response to the Executive Summary. This information may then be utilized to update the Unit Plan if necessary.

- When creating objectives that contain resource allocation requests for faculty, classified staff, or facilities, you will be required to enter additional information corresponding to the PFC Resource Allocation Committee scoring system. The additional information will be entered in the software and the weight of each section that will be scored is listed along with each question.

- You may also run reports to summarize plan goals and resources from programs in your Unit. Instructions for how to run reports are located here – How to Run Reports

- The Strategic Directions section includes an addition to help inform the creation of the new Technology Plan. Please read the help instructions carefully to incorporate this additional information.