DATE: November 7, 2016
TO: Unit Managers
FROM: Institutional Effectiveness Committee (IEC) Chairs – Lydia Gonzalez and Howard Kummerman
SUBJECT: 2017-2018 Unit Plans

This memo will provide information on the steps to complete your Unit Plans, which are due by Friday, December 9, 2016. Program Plans and Program Review Plans in your Unit should now be complete and submitted. These 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. Remember, the objectives carry forward any resource allocation requests.

- Once the software template for your 2017-2018 plan has been created, the IRP office will place your Unit level data into the plan within 48 hours. Data is also available on the public drive here P:\Planning\Unit Plan Data 2017-2018 and on the IRP Channel of the employee tab in Access Rio Portal.

- The second step in creating your 2017-2018 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.

- The final version of the Institutional Goals and Objectives help to guide your unit level goals and objectives. Action plans from the Institutional plan will be sent to you separately so you can incorporate them into your Unit 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.

- If you are requesting faculty positions, the IRP office will populate enrollment data in your Unit Plan to utilize for the resource allocation template questions. The data will be included for faculty positions listed in Unit Plans by the end of the day on Friday, November 18.

- 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.