Institutional Planning Process 2020-2021
Annual Unit Plan Content & Navigation Guide

Annual Unit Plan

Through the annual planning process Rio Hondo College demonstrates the relationship between the long-term strategic plan of the college and the work of programs on campus. It's a process that allows staff, faculty, and administrators a way to explain their contributions to the institution's progress and how their contributions will continue throughout the next year. The data generated provides a basis for assessment of institutional progress and allows the college to make informed decisions about the allocation of resources.

Each unit on campus is asked to complete an annual plan each year. The unit plan reflects the program(s) within it, as indicated by the planning structure managed by the Institutional Research & Planning department.

The following information is requested in the annual unit plan.

Unit Description

The unit's mission statement, approximate budget, estimated number of faculty and staff, location, services, and target audience. The unit's involvement with, and the impact of, professional development activities, local projects, and statewide initiatives. Progress made towards the unit's objectives stated in previous unit plans over the last year and the status of unit's resource requests.

Outcomes

Instructional units report on course-level outcomes within the unit, for example, where programs are in collecting data, assessing data, and acting on the finding from data analysis.

Non-instructional units report on the program outcomes findings within the unit, for example, where programs are in collecting data, assessing data, and acting on the finding from data analysis.

Data Analysis

Instructional units review and analyze enrollment trends, student achievement, and equity gaps in order to identify strengths and opportunities and to inform objectives and resource requests.

Non-Instructional units provide program data with analysis of trends in order to identify strengths and opportunities and to inform objectives and resource requests.

Objectives & Resource Requests

Units identify what objectives the unit will work on the following academic year and request resources needed by programs, or the unit, that are needed to accomplish the objectives.

ⓘ For assistance, contact the planning helpline: 562-463-6644

Taskstream Access and Navigation

Taskstream Access

- Taskstream can be accessed on campus or off campus with any common internet browser.
- Access Taskstream through:
    - **Rio Hondo College Institutional Research & Planning website** – Go to the planning page and then click on Taskstream logo.
    - **Access Rio portal** – Go to the Institutional Research & Planning section and click on the Taskstream logo.
- Login using your existing Rio Hondo College username and password.

General Taskstream Navigation

- Once in a workspace template, navigate using the menu on the left.
- Each section of the template has a heading and one or more subheadings.
- All work is done in the subheadings.
- **Check Out** – Check Out to start a section.

- **Directions** – Content and software directions are on each page.

1. Mission Statement

The purpose of this section is to ensure alignment between the college's mission, the unit's mission, and the annual unit plan.

1.1. Mission Statement

Instructions

In this section, provide a succinct statement about the unit's purpose, primary functions, key stakeholders, and how the unit supports the college mission. For the purposes of planning, the mission statement should be 1-2 sentences.

Taskstream Navigation

1. From menu on the left, click the Mission Statement sub-heading then CHECK OUT
2. Click Edit and enter, or edit, mission statement
3. When finished, click SUBMIT, click Return to Work Area if prompted, then CHECK IN

Rio Hondo College Mission Statement

Rio Hondo College is committed to the success of its diverse students and communities by providing dynamic educational opportunities and resources that lead to degrees, certificates, transfer, career and technical pathways, basic skills proficiency, and lifelong learning.

2. Unit Description

The purpose of this section is to provide an accurate description of the unit and report changes from the previous year. The information will provide a context for the resource allocation process. If the unit is not requesting resources, the unit manager may choose to only complete sub-section 2.5 Unit Progress.

2.1. Budget, Space Allocation, and Staffing

Instructions

Provide a brief description of the unit's budget. Give the estimated number of faculty, staff, and administrators and indicate if they are full or part-time. Briefly describe where the unit is located including building and room numbers where applicable.

Taskstream Navigation

1. From menu on the left, click the Budget, Space Allocation, and Staffing sub-heading then CHECK OUT
2. Click Text & Image and add information about the unit
3. When finished, click SAVE AND RETURN then CHECK IN

2.2. Projects, Grants, and Initiatives

Instructions

Provide a brief description of current projects, grants, or statewide initiatives that are impacting the unit, or have impacted it over the last year.

Taskstream Navigation

1. From menu on the left, click the Projects, Grants, and Initiatives sub-heading then CHECK OUT
2. Click Text & Image and add information about the unit
3. When finished, click SAVE AND RETURN then CHECK IN

2.3. Professional Development

Instructions

Briefly list professional development opportunities and level of participation by unit faculty and staff over the last year.

Taskstream Navigation

1. From menu on the left, click the Professional Development sub-heading then CHECK OUT
2. Click Text & Image and add information about the unit
3. When finished, click SAVE AND RETURN then CHECK IN

2.4. Services and Target Audience

Instructions

Provide a short summary of the services offered by the unit and the target audience, noting any changes that have happened over the last year.

Taskstream Navigation

1. From menu on the left, click the Services and Target Audience sub-heading then CHECK OUT
2. Click Text & Image and add information about the unit
3. When finished, click SAVE AND RETURN then CHECK IN

2.5. Unit Progress

Instructions

Describe progress on the unit's objectives from last year's annual plan and note the status of resource requests.

Taskstream Navigation

1. From menu on the left, click the Unit Progress sub-heading then CHECK OUT
2. Click Text & Image and add information about the unit
3. When finished, click SAVE AND RETURN then CHECK IN

2.6. Additional Information

Include any additional information about the unit in this section, if needed.

ⓘ Use **CTRL+C** and **CTRL+V** to copy and paste into Taskstream.

3. Outcomes

The purpose of this section is to record and review the outcomes within the unit.

3.1. Outcomes within Unit

Instructions

1) **Instructional Units** – Report on the course-level outcomes within the unit. Address any significant trends and their effects on the unit. Based on the data analysis and your discussions, identify areas where you have had success and those that need improvement.

2) **Non-Instructional Units –** Report on the program outcomes findings within the unit. Address any significant trends and their effects on the unit. Based on the data analysis and your discussions, identify areas where you have had success and those that need improvement.

Taskstream Navigation

1. From menu on the left, click Outcomes Within Unit sub-heading then CHECK OUT
2. Click Text & Image and add information about unit outcomes
3. When finished, click SAVE AND RETURN
4. Click Attachments and add required attachments then CHECK IN

ⓘ Use **CTRL+C** and **CTRL+V** to copy and paste into Taskstream.

4. Data Analysis

The purpose of this section is to identify unit strengths, find opportunities for unit improvement, and identify resource needs.

4.1. Data Analysis

Instructions

Instructional Units:

Review and analyze planning data for your unit. Include analysis of the following:

a. **Enrollment trends** such as FTES, fill rates, sections offered, and efficiency (FTES/FTEF)
b. **Student achievement** outcomes such as course success and retention and course success and retention by modality particularly as it concerns distance education,
c. **Equity gaps** in student achievement outcomes such as course success and retention.

In looking at enrollment and achievement data, historical comparisons can be made as well as comparisons to like disciplines in your unit, the unit overall, and to the college overall.

Non-Instructional Units:

Provide data relevant to outcomes within your unit, primary functions, and other significant topics. Include analysis of data trends and reasons for these trends.

Student Services units offering courses should also provide data and analysis related to enrollment, student achievement, and equity gaps, as detailed above for instructional units.

Taskstream Navigation

1. From menu on the left, click the Data & Analysis sub-heading then CHECK OUT
2. Click Text & Image and add information about the unit
3. When finished, click SAVE AND RETURN then CHECK IN

5. Objectives & Resource Requests

The purpose of this section is to identify unit objectives for the following academic year as well as resources that are needed to bring these objectives to fruition.

5.1. Unit Objectives

Instructions

At least one objective should be set for the coming year. The objectives should be logical next steps the unit will take in response to the data reported in the previous section. Objectives should describe actions (e.g. enhance, expand) that the unit will take to move towards outcomes. They should be observable and measurable so that progress, or completion, can be reported the following year.

Each objective should be mapped to an institutional objective to demonstrate how it contributes to the college's goals. If needed, resources to support the objectives can be requested.

Taskstream Navigation

1. From menu on the left, click the Unit Objectives sub-heading then CHECK OUT
2. Click CREATE NEW SET or SELECT EXISTING SET
3. If **CREATE NEW SET** *NOTE: Use this option if you have not previously created an action plan or if using the information from last year is not practical.)*
   - Create set of objectives called "[Unit] Objectives [Year]-[Year]"
   - Check box to Designate Alignment/Mapping then click CONTINUE
   - Click Create New Outcome type objective in box, add description if desired then click CONTINUE
   - Click Add mapping then use dropdown to select **Goal sets distributed to [Unit]** then click Go
   - Click radio button next to **Institutional Goals & Objectives** then click CONTINUE
   - Select at least one Institutional Objective to correspond to your unit objective
   - Repeat steps 6-10 for each new objective then CHECK IN
4. **If SELECT EXISTING SET**
   - Select radio button next to action plan then click CONTINUE
   - Edit outcomes or details, if needed then click CHECK IN

5.2 Full-time Faculty Request

Instructions

Use this subsection only for requesting a full-time faculty member. Link each request to an objective that it supports. Complete each section of the template, special attention should be paid to the rationale.

Program – Position Title	Provide the program and position being requested, e.g. Transfer Center – Counselor, Photography – Full-time Instructor.
Rationale	Explain the reason for the request and the anticipated impact it will have on the program or unit. (Weight 10)
Enrollment Justification	Describe how enrollment data justifies the position. (Weight 20)
Hiring History Justification	Provide the five-year history of hiring in the department and how it justifies the position being requested. (Weight 10)
Budget Request Amount	All full-time faculty requests should be listed as $100,000.
Priority	Set a priority that situates the request among other requests made by the unit in this category.

Taskstream Navigation

1. From menu on the left, click the Request Full-Time Faculty sub-heading then click CHECK OUT

   The first time this subsection is checked out, the relevant objective set will need to be selected. After CHECK OUT, click COPY EXISTING PLAN AS STARTING POINT, select Objective Set created for 2020-2021, click SUBMIT then proceed to step 2.

2. Click Select Set then SELECT EXISTING SET
3. Select the applicable [Unit] Objectives for 2020-2021 then click CONTINUE
4. Select the applicable Objective related to the resource being requested then ACCEPT AND RETURN TO PLAN
5. Click Add New Action and then add Title (resource being requested) and details as indicated in the template then click APPLY CHANGES then CHECK IN

5.3. Full-time Classified Request

Instructions

Use this subsection only for requesting a full-time classified staff member. Link each request to an objective that it supports. Complete each section of the template, special attention should be paid to the rationale.

Program – Position Title	Provide the program and position being requested, e.g. Student Center – Clerk Typist II, and Marketing and Communications - Graphic Designer
Basic Job Description	Provide a basic job description for the position being requested.
Rationale	Explain the reason for the request and the anticipated impact it will have on the unit. (Weight 20)
Service Justification	Describe how the position would serve students, employees, and/or the institution. (Weight 10)
Campus Impact Justification	Describe the impact this position would have on students, employees, and/or the institution. (Weight 10)
Federal/State Justification	If applicable, provide information about federal mandate, state mandates, health requirements, or safety requirements that justify this position. (Weight 15)
Budget Request Amount	Provide a realistic estimate for the cost of the position, if funded.
Priority	Set a priority that situates the request among other requests made by the unit in this category.

Taskstream Navigation

1. From menu on the left, click the Full-Time Classified Request sub-heading then click CHECK OUT

   The first time this subsection is checked out, the relevant objective set will need to be selected. After CHECK OUT, click COPY EXISTING PLAN AS STARTING POINT, select Objective Set created for 2020-2021, click SUBMIT then proceed to step 2.

2. Click Select Set then SELECT EXISTING SET
3. Select the applicable [Unit] Objectives for 2020-2021 then click CONTINUE
4. Select the applicable Objective related to the resource being requested then ✔ ACCEPT AND RETURN TO PLAN
5. Click Add New Action and then add Title (resource being requested) and details as indicated in the template then click APPLY CHANGES then CHECK IN

5.4. Full-time Administrator Request

Instructions

Use this subsection only for requesting a full-time administrator. Link each request to an objective that is supports. Complete each section of the template, special attention should be paid to the rationale.

Program – Position Title	Provide the program and position being requested, e.g. Child Development Center – Director, Information Technology – Associate Director.
Rationale	Explain the reason for the request and the anticipated impact it will have on the unit.
Budget Request Amount	Provide a realistic estimate for the cost of the position, if funded.
Priority	Set a priority that situates the request among other requests made by the unit in this category.

Taskstream Navigation

1. From menu on the left, click the Full-Time Administrator Request sub-heading then click CHECK OUT

   The first time this subsection is checked out, the relevant objective set will need to be selected. After CHECK OUT, click COPY EXISTING PLAN AS STARTING POINT, select Objective Set created for 2020-2021, click SUBMIT then proceed to step 2.

2. Click Select Set then SELECT EXISTING SET
3. Select the applicable [Unit] Objectives for 2020-2021 then click CONTINUE
4. Select the applicable Objective related to the resource being requested then ✔ ACCEPT AND RETURN TO PLAN
5. Click Add New Action and then add Title (resource being requested) and details as indicated in the template then click APPLY CHANGES then CHECK IN

5.5 Item, Project, or Part-Time Position

Instructions

Use this subsection to request an item, project, or part-time position. Link each request to an objective that it supports. Complete each section of the template, special attention should be paid to the rationale.

Action Item Title	Title of request
Program - Position Title (%), Item, or Project	Provide the program, title, and percentage of the position being requested, e.g. Transfer Center – Counselor (25%), CTE – Research Analyst (50%), the item being requested, or the project being requested.
Rationale	Explain the reason for the request and the anticipated impact it will have on the unit. (Weight 20)
Location (if applicable)	Provide the intended location for items and projects.
One-time or Ongoing	Indicate if this request is for one-time funding or if ongoing funding is needed.
Budget Request Amount	Provide a realistic estimate for the cost of the position, item, or project if funded.
Priority	Set a priority that situates the request among other requests made by the unit in this category.

Taskstream Navigation

1. From menu on the left, click the Item, Project, or Part-Time Position Request sub-heading then click CHECK OUT

   The first time this subsection is checked out, the relevant objective set will need to be selected. After CHECK OUT, click COPY EXISTING PLAN AS STARTING POINT, select Objective Set created for 2020-2021, click SUBMIT then proceed to step 2.

2. Click Select Set then SELECT EXISTING SET
3. Select the applicable [Unit] Objectives for 2020-2021 then click CONTINUE
4. Select the applicable Objective related to the resource being requested then ✔ ACCEPT AND RETURN TO PLAN
5. Click Add New Action and then add Title (resource being requested) and details as indicated in the template then click APPLY CHANGES then CHECK IN

6. Unit Plan Submission

The purpose of this section is to submit your Annual Unit Plan within Taskstream and "lock" the workspace to prevent additional changes.

6.1. Submission

Instructions

Annual Unit Plans should be submitted using the steps below. It is recommended that the unit also keep a PDF on file.

Taskstream Navigation

1. **Create a PDF of the plan**
   - Click the Publish tab
   - Click Export to PDF
   - Select pages to be included and then CONTINUE »
   - Click **OK** in pop-up
2. **Download the PDF**
   - Go to RESOURCE TOOLS
   - Click Exports then locate PDF and click Download
   - Save PDF on computer desktop
3. **Upload the PDF to your workspace**
   - Return to your workspace
   - Click the Submit Your Plan sub-heading and CHECK OUT
   - Click to add Attachments then Upload from Computer
   - Click + Add Files and locate PDF on desktop then click **Open** then Upload and Close then SAVE AND RETURN
4. **Submit the Plan**
   - Click on Submit section
   - Click **Submit Work** or Edit Work then click **YES – SUBMIT MY WORK**