

Status: **Incomplete**

Entry #: 22

Date Submitted:

2020-2021 COMPREHENSIVE REVIEW

OVERVIEW OF PROGRAM REVIEW AND PLANNING FOR NON- INSTRUCTIONAL PROGRAMS

Program Review is a self-study of your unit. For non-instructional program review, the definition of what is a unit varies based upon your division. A unit may be a department (e.g., Information Services, Institutional Research and Planning, Financial Aid), a program (e.g., EOPS, TRIO), or a division (Human Resource Services). The Vice Presidents for each division have identified/defined the units that will complete the review cycle.

Regardless of whether your unit is a program, department, or division, program review is about documenting the plans you have for improving Institutional Effectiveness in your area and sharing that information with the college community. Through the review of and reflection on key elements, program review and planning identifies program strengths as well as strategies necessary to improve the operation of your area. With that in mind, please answer the following questions.

BASIC UNIT INFORMATION

Program/Unit Name

Finance and Administrative Services

Department Name

FAS Division Office

Division Name

Finance and Administrative Services

Name of Person responsible for the Program/Unit

Yulian Ligioso

Website address(es) for your program(s)/unit(s)**Webpage URL 1****Unit webpage**<https://www2.palomar.edu/pages/fas/>**Please list all participants and their respective titles in this Program Review**

Participant	Title
Yulian Ligioso	Acting Assistant Superintendent/Vice President
Heather Sutton	Acting Executive Assistant

PROGRAM/UNIT MISSION STATEMENT

What is your Program/Unit's mission statement?

Finance and Administrative Services is dedicated to providing quality service to the District's administration, faculty, and staff in support of an engaging teaching and learning environment for our students. We are committed to operating in a manner that is based upon integrity, transparency and equity while recognizing the central role of administrative support services in the success of the institution and in ensuring the public's trust.

Describe how your mission statement aligns with and contributes to the College's Vision and Mission.

Through our functional services areas ensure fiscal stability and creating/equipping facilities and providing technology conducive to improving teaching and learning environments.

Reminder: Data does not autosave. Save this content before moving to the next section or closing form.

PROGRAM/UNIT DESCRIPTION

Staffing

Use the Permanent Staff Count link below to answer staffing questions.

Link: [Permanent Employees Staff Counts](#)

This form required a login and password to access. Please use your Palomar email and password to log in.

Full-Time Staff

Total Number of Full-time Staff

2.00

Number of Classified Staff

Number of CAST Staff

1.00

Number of Administrators

1.00

Number of Full-time Faculty

Part-Time Staff

Total Number of Permanent Part-time Staff

FTE of Part-time Staff (2x19 hr/wk=.95)

FTEF of Part-time Faculty

Describe additional temporary hourly or contract staff who support this unit and/or department. (Include FWS/District Student Worker/Veteran Student Worker)

As part of the PRP cycle, Human Resource Services has sent organizational charts to all non-instructional units. Please review the charts and make any needed changes. Attach a copy of the chart when you are submitting your review or provide the link to your organizational chart if it is online.

OR

If you cannot create an organizational chart, or did not receive one from Human Resource Services, list the positions in your unit showing reporting relationships (e.g., Manager, Facilities with the following direct reports, Supervisor Position A, Supervisor Position B, Supervisor Position C; Supervisor Position A with direct reports, Position A, Position B, Position C)

If you need help, please contact us and we will walk you through the process (msnyder2@palomar.edu or mbarton@palomar.edu)

How will you submit your organizational chart?

Provide web link

Website

<https://www2.palomar.edu/pages/fas/organizational-chart/>

Program/Unit Description

Who utilizes your services

The Finance and Administrative Services Division serves students, faculty, staff, administrators and our community across all District locations.

What services does your program/unit provide (Describe your program/unit)?

Finance & Administration due to its comprehensive functional areas provides institution wide services in finance, internal audit, risk management, facilities and capital construction, technology, and campus safety and security.

Reminder: Data does not autosave. Save this content before moving to the next section or closing form.

PROGRAM/UNIT ASSESSMENT

SERVICE AREA OUTCOME ASSESSMENT

GOT SERVICE AREA OUTCOMES?

Outcomes are statements written in support of student learning to show direct support (instruction) or indirect support (services) provided on campus. Assessment is the way we measure how well we are achieving our outcomes.

For non-instructional areas, outcomes are called Service Area Outcomes (SAO).

So, what is an SAO?

A Service Area Outcome (SAO) is a statement about what a client will experience, receive, or know as a result of a given service. Clients can be students, faculty, staff, or community members.

As part of our three-year planning and review cycles, all non-instructional units are asked to:

- identify at least two SAOs,
- develop a plan and assess their SAOs,
- reflect on the results,
- and take action, as necessary.

Palomar has adopted Nuventive Improve (previously named TracDat) as our official repository for SLO and SAO Assessment information.

Review and/or define your SAOs and assessment plans and ensure they are entered in Nuventive Improve by:

- 1) Login to Nuventive Improve (previously TracDat) <https://www2.palomar.edu/pages/sloresources/2015/08/10/tracdat/>. Your Palomar username and password is your login.
- 2) Check your SAOs for **currency** and **sunset** any SAOs if you no longer plan to assess them.
- 3) Revise or edit your current SAOs by revising their wording and/or updating the assessment and assessment results.

NEED HELP?

Nuventive Improve:

- 1) If you need help with anything Nuventive Improve related such as login, unit identification, entering SAO info, contact Marti Snyder at msnyder2@palomar.edu.
- 2) Check out this video on how to enter SAOs in Nuventive Improve: <https://youtu.be/b1sRa68wm4c>

Defining and Assessing SAOs:

Not sure if your SAOs make the grade? Need some help writing an SAO? Not sure about how to assess your SAOs?

- 1) [Hartnell's SAO Guide](#) is a nice resource! Thank you Hartnell!

- 2) Contact Michelle Barton at mbarton@palomar.edu. We have a resource support team to help.

A template for entering SAOs can be found on the [IR&Ps Non-instructional Program Review and Planning website](#)

Date Identified or Last Reviewed	Description of SAO (What is your SAO?)	Assessment Method (How will/do you measure or assess it?)	Criterion (How will/do you know if you met the outcome?)	Date of Assessment	Date of Next Assessment
1)					
2)					
3)					
4)					

Are all of your unit's SAOs and assessment plans **UPDATED** and **ENTERED** in Nuventive Improve?

If NO, describe why and identify a date by which they will be entered.

SAOs SUMMARIES AND REFLECTIONS

For each SAO in Nuventive Improve summarize what you learned from the assessment and what improvements you have implemented or plan to implement as a result of your SAO assessments.

SAOs

SAO 1

SAO Title

Assessment Status
Assessed

SAO Summary and Reflection

OTHER ASSESSMENT DATA

Quantitative Data

List all other quantitative and/or qualitative measures you use to track, monitor, and/or evaluate the effectiveness of your program/Unit.

Measures, Descriptions, and Annual Values

Measure 1

Name of Measure

Description of Measure

Year

Year

Year

Year

Value

Value

Value

Value

List values for years listed immediately above. Select "+ Add Measure" below to insert all measures, values, and descriptions.

Reflect on your quantitative data and summarize your findings or interpretations.

Qualitative Data

Describe any qualitative measures you use and summarize the results.

What improvements have you implemented or plan to implement as a result of your assessment of quantitative and/or qualitative data described above?

Reminder: Data does not autosave. Save this content before moving to the next section or closing form.

ACHIEVEMENTS AND OTHER RELEVANT INFORMATION

Describe your program's achievements this past year. Where possible, describe how these achievements are related to our students and their success!

Describe any recent changes in legislation, policies, procedures, processes, and/or technology (software and hardware) that have impacted or will impact your program/unit. What effect will these changes have on your program/unit?

In addition to (or in response to) the changes listed above, what board policies, procedures, and processes need to be updated, created, or deleted?

Reminder: Data does not autosave. Save this content before moving to the next section or closing form.

PROGRAM/UNIT EVALUATION AND THREE-YEAR PLANNING

Program Evaluation and Planning is completed in two steps.

First, you will complete an overall evaluation of your unit drawing from your unit assessment data.

Second, working from that evaluation, you will establish your goals for the upcoming three years.

Section 1: Overall Evaluation of Program

Reflect on your unit, the results of your assessments in Part 2 above, and your vision for the future. Then, working together answer the following questions. Summarize your answers in the grid below.

1. What are our greatest strengths?
2. What are our best opportunities?
3. What is our preferred future, what do we aspire to do?
4. What are the measurable results that will tell us we've achieved that vision of the future?

Section 2: Establish Goals and Strategies for the Next Three Years

Once you have completed your overall evaluation, identify a set of goals and strategies for accomplishing them for this upcoming three-year planning cycle. Use the template in Section 2 below to document your goals, strategies, and timelines for completion. Goals should be Specific, Measurable, Attainable, Relevant, and Time –Specific (SMART). Following the goal template below will help you create SMART goals!

OVERALL EVALUATION OF PROGRAM

Discuss your Program's/Unit's Strengths, Opportunities, Aspirations, and Results (SOAR) and summarize your discussion below.

Strengths:

Opportunities:

Aspirations:

Results:

Reminder: Data does not autosave. Save this content before moving to the next section or closing form.

PROGRESS ON PRIOR PRP GOALS

List current or prior PRP goals your unit has been working on and provide an update by placing an “X” in the appropriate status box.

Prior PRP Goals

Goal 1

Goal

Choice

Completed

Add any comments related to your work on prior goals, if needed (e.g., successes, challenges, reasons for eliminating a goal).

ESTABLISH GOALS AND STRATEGIES FOR THE NEXT THREE YEARS

New Goals: Please list all goals for this three-year planning cycle.

Goal 1

Description

Strategies for implementation

Timeline for implementation

Outcome(s) expected (qualitative/quantitative)

How does this goal align with your unit’s mission statement?

How does this goals align with the College’s Strategic Plan 2022?

Expected Goal Completion Date

How do your goals align with the College’s values of equity and inclusion?

The Strategic Plan 2022 includes the College’s Vision for Success (VfS) outcomes. Review the VfS goals and reflect on how your unit supports these outcomes. Identify one strategy your unit will implement to help the college meet these outcomes. [Click here to access Strategic Plan 2022.](#)

Reminder: Data does not autosave. Save this content before moving to the next section or closing form.

RESOURCES

Congratulations! You are nearing completion. In this section, you will consider the resources you need to implement your three-year program review plan and/or address any findings from your assessment of your discipline.

The section is organized into the following four parts:

PART 1: Staffing Needs (Faculty and Additional Staff)

PART 2: Budget Review

PART 3: Technology and Facilities Needs

PART 4: One Time Request for Other Needs (NonTechnology Equipment, Supplies, Operating Expenses, Travel)

Reflect upon the three year plan you created above, your current operations, and any upcoming factors (retirements, changes in legislation, and changes in policies or procedures) that will impact your unit. How will you allocate resources to implement your plan? Describe additional resources needed to improve the effectiveness of your unit/program. All resource requests must be aligned with the College's **Strategic Plan 2022.**

Summarize any reallocation/re-organization of resources you are making based upon your three-year plan, your current operations, and any other factors (e.g., legislation). Describe the impact of the reallocation of resources to your unit.

PART 1: STAFFING NEEDS

Are you requesting new Classified, CAST, or AA positions?

Yes

If you are requesting STAFF, please fully complete this section. If not, you can skip to the next resource section. Click "+Add Staff, CAST, AA request" below for each additional request.

When considering the funds required for a position, consult the HR website for position salary schedule and the [Benefits Worksheet](#) for additional costs related to benefits for the position.

REQUEST FOR ADDITIONAL CLASSIFIED, CAST, AA

Staff, CAST, AA request 1

Title of position

Is this request for a full-time or part-time position?

Full Time

How does the position fill a critical need for current, future, or critical operations? e.g. accreditation, health and safety, regulatory, legal mandates, institutional priorities, program trend analyses of growth/stability.

Does the position assist in establishing more efficient District Operations through either of the following: reorganization/restructuring OR use of technology?

Is there funding that can help support the position outside of general funds?

No

Describe how this position helps implement or support your three-year PRP plan.

Strategic Plan 2022 Objective

If the position is not approved, what is your plan?

PART 2: BUDGET REVIEW

Review your Budget/Expenditure reports for 2018, 2019, 2020. Consider your three-year PRP plan.

Click on the link below to access directions to the *Available Budget Report* to complete this section.

[How to Request the Available Budget Report](#)

Reflecting on your three-year PRP plan, are there any budget considerations you would like your dean/supervisor to be aware of for the upcoming year?

No

Reminder: Data does not autosave. Save this content before moving to the next section or closing form.

NOTE: PARTS 3 and 4 – TECHNOLOGY, FACILITIES AND OTHER NEEDS

This year the College is implementing two new processes related to resource needs coming from the PRP process.

1. One-Time Fund Requests. The college is implementing a process for prioritizing and allocating funds for one-time needs/requests tied to Program Review and Planning. Prioritization will take place through participatory governance in planning councils and the Budget Committee. Then, a recommendation will be made to Exec for funding of request utilizing various funding sources.

For more information about funding sources available, see [IELM BLOCK GRANT, LOTTERY, PERKINS AND STRONG WORKFORCE GUIDELINES](#) (on the left menu of the web page).

Consider submitting one-time requests only if you have verified that you cannot fund the request using your general discretionary funds or other funds.

2. Technology and Facilities Review. From now on, ALL requests for technology will go through an institutional review process. If you request technology here, you will see a description of the process below.

PART 3: TECHNOLOGY

Will you be requesting any technology (hardware/software) this upcoming year?

No

Note about technology requests:

All technology requests will now go through a review process before prioritization.

- *Your director will send you a Technology Request Checklist (aka Technology Proposal Analysis Checklist).*
 - *You must complete this checklist and return it to your director no later than 10/30/2020.*
 - *Once the director approves the form and the request, the director will send the document to the Technology Review Committee to determine IS resources needed, any integration issues, and/or potential overlap with existing technology.*
 - *The results of the review will be sent to the director with feedback.*
 - *The director will determine whether or not the request moves forward for prioritization and/or implementation.*
 - *Requests for one-time funding will move forward for prioritization.*
 - *Requests that use funding from your department budget may move forward for purchase.*

PART 3: FACILITIES NEEDS

Do you have resource needs that require physical space or modification to physical space?

No

One Time Needs

For more information about funding sources available, see [IELM BLOCK GRANT, LOTTERY, PERKINS AND STRONG WORKFORCE GUIDELINES](#) (on the left menu of the web page under "Instructional Funding Sources").

Do you have one-time requests for other items (e.g., Non-Technology Equipment, Supplies, Operating Expenses, Travel) that your budget or other funding sources will NOT cover?

No

Reminder: Data does not autosave. Save this content before moving to the next section or closing form.

FEEDBACK AND FOLLOW-UP

Once your Program/Unit PRP is completed, your division or planning council should review and discuss based on your Vice President's planning process. This area is intended for summary feedback and recommendations from the divisional review.

Confirmation of Review by Division / Planning Council

Person/Group/Council who reviewed PRP:

Sign Date

FEEDBACK

Strengths and successes of the program/unit as evidenced by the data, analysis, and assessments:

Areas of Concern, if any:

Recommendations for improvement:

Enter your email address to receive a copy of the PRP to keep for your records.

I confirm that the Program Review is complete and ready to be submitted.

No

Vice President Review

Strengths and successes of the discipline as evidenced by the data and analysis:

Areas of concern, if any:

Recommendations for improvement:

VP Name:

Signature Date: