



# 2022-23 Non-Instructional Program Review and Planning

## 2022-2023 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 and strategies necessary to improve the operation of your area. With that in mind, please answer the following questions.

### BASIC UNIT INFORMATION

Academic Year

2022-23

Are you completing a Comprehensive or Annual PRP?

Comprehensive

Division Name

Student Services

Department Name

SS Enrollment Services

*Choose your department. If you don't see it, you may add it by typing it in the box.*

Program/Unit Name

Records and Evaluations

*Programs/units are listed by division in alphabetical order (FAS, HRS, INSTR, PRES, SS). If you don't see your unit, you may add it by typing it in the box.*

Name of Person responsible for the Program/Unit

Dr. Kendyl Magnuson

### Website address(es) for your program(s)/unit(s)

Units need not include each webpage within the main site. However, if your unit oversees multiple areas, please list the sites for each area reviewed in this PRP form.

Click "+Add Webpage URL" to include additional web pages

## Webpage URL 1

### Unit webpage

<https://www.palomar.edu/evaluationsandrecords/>

## Please list all participants and their respective titles in this Program Review

Click on "+Add Participant" below to include additional participants.

Participant	Title
Dr. Kendyl Magnuson	Sr. Director, Enrollment Services
Jamie Moss	Manager, Enrollment and Financial Aid Services
Rick Herren	Lead Academic Records Analyst
Polly Shafer	Lead Academic Records Analyst

## PROGRAM/UNIT MISSION STATEMENT

### What is your Program's/Unit's Mission Statement?

The Division of Enrollment Services is committed to excellence. We provide support services that enable prospective and current students to successfully navigate college and meet their learning goals. The Division is made up of professionals who serve in the following areas: Admissions, Evaluations, Financial Aid, International Education, Records, Scholarships, and Veterans. We value empowerment, collaboration, and innovation. We complete our work accurately and maintain compliance with all federal, state, and local regulations. We work as a team and in partnership with all other areas of the college from a student's first point of contact through completion. We care about our students and their success.

Click here for [How to Create a Mission Statement](#).

### Describe how your Mission Statement aligns with and contributes to the College's Vision and Mission.

Our department's mission aligns with the College's vision and mission in variety of ways. Both speak to the importance of focusing on all of our students' success as they pursue the completion their educational goal. We accept and articulate transfer coursework work to help students determine where they are in the progress of completing their program of study. This helps empower our students to succeed.

Link: [Vision, Mission, and Values](#)

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## PROGRAM/UNIT DESCRIPTION

## Staffing

In this section, you will identify how many faculty and staff support your program. This information is considered when you request permanent staff and faculty hires. It is also useful as you evaluate your program and the human resources and talent you have to support our students.

To help you answer questions in this section, you will need the link shown in red below. This form required a login and password to access. Please use your Palomar email and password to log in.

Link: [Permanent Faculty and Staff Count](#)

### **Full-Time Staff**

#### **Total Number of Full-time Staff**

#### **Number of Classified Staff**

#### **Number of CAST Staff**

#### **Number of Administrators**

#### **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 Workers/Veteran Student Workers)**

1 hourly Evaluator (retiree)

1 hourly Records (retiree)

2-3 Federal Work Study student workers that help us provide front counter services, answer phones, scan and data enter incoming transcripts and provide data entry quality control.

**Have you experienced any changes in staff this past year? If so, please describe how the changes have impacted your operations.**

We have filled 2 Academic Records Specialists and 2 Academic Records Analysts this year. The hiring of the 2 Academic Records Specialists is invaluable. We were using Analysts to help cover front counter needs in the Records Office, delaying the awarding of degrees and certificates. The new Academic Records Specialists have learned our processes quickly and have been helping to clear out a backlog of work. The 2 Academic Records Analysts began in May. The learning curve for Analysts is very steep, regardless of their previous experience, and usually takes a full year to learn a college's policies and procedures in Evaluations. Over the last few years, we have used a large amount of overtime funds and brought back retirees on an hourly basis to help meet state mandated deadlines. The addition of the 2 Analysts should help Evaluations award degrees and certificates in a timelier manner.

**As part of the PRP cycle, Human Resource Services will provide Organizational Charts for all non-instructional units. Review the following organizational charts to answer the questions below.**

- [Finance and Administrative Services](#)
- [Human Resource Services](#)
- [Instructional Services](#)
- [President's Office](#)
- [Student Services](#)

**In reviewing your organizational structure, what are the strengths and opportunities this structure brings to the department, division, and College?**

The organizational structure as currently set up for Enrollment Services has proven to be beneficial. It systematically ensures communication and collaboration. Because so many of the functions and work Admissions does impacts other areas within the Division, it's imperative all areas communicate often and works collaboratively on projects within each area. This is established because all of Enrollment Services reports to the Sr. Director of Enrollment Services and/or the Director of Financial Aid.

**In reviewing the organization structure, are there areas that could be improved if you were structured differently (i.e., efficiencies, communications/collaboration with the College, needs, etc.)?**

None at this time.

## **Program/Unit Description**

**Who utilizes your services?**

The Records and Evaluation Offices serve:

- Prospective students who submit transcripts to clear prerequisites, meet with a counselor and to determine financial aid eligibility.
- Current students who apply for graduation, degrees or certificates; need transcripts sent out or delivered, students who submit graduation petitions, need to clear academic status and need academic renewals completed.
- Former students who need copies of transcripts.
- Counselors who need course equivalencies verified from other institutions.
- The Financial Aid Office needs us to evaluate transfer credit coursework so they can determine financial aid eligibility.
- The Veterans Office needs us to enter military coursework and complete evaluations so Veterans can continue to receive veteran's benefits.
- The Student Affairs Office needs graduate and candidates' names for commencement and Dean's list.

### **What services does your program/unit provide (describe your program/unit)?**

The Records and Evaluations Office are responsible for maintaining academic records, enforcing academic regulations, and awarding degrees and certificates. The Records Office processes grades; maintains student academic history; processes requests for transcript and verifications of enrollment; receives transcripts, test results, etc. from other institutions; and processes Petitions for Academic Renewal and Credit by Examination. The Evaluations Office processes petitions for graduation and transfer; evaluates transcripts and records; posts degrees, certificates, and transfer certifications; processes Academic Standing, including Dean's List and Probation/Dismissal; and processes Petitions for Course Repetition.

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## **PROGRAM/UNIT ASSESSMENT**

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### **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 uses Nuventive Improve as our official repository for SLO and SAO Assessment information.

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

- 1) Login to Nuventive Improve through the Palomar College [Single Sign-on](#).
- 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 method and/or assessment results, if appropriate.

**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](mailto: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](mailto: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](#)

SERVICE AREA OUTCOMES TEMPLATE					
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)	SAMPLE				
2)					
3)					
4)					

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

☐ Yes ☒ No

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

## SAOs SUMMARIES AND REFLECTIONS

Each of your program/unit SAOs should be assessed at least once every three years. 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

Click "+Add SAO" below to include additional requests.

#### SAO 1

##### SAO Title

Expedite the graduation application process through student awareness and use of the online application.

##### Assessment Status

☒ Assessed ☐ Not assessed

##### SAO Summary and Reflection

We continue to work on creating an on-line graduation application. Prior to launching this application, work needs to be done in the following areas:

Launch Degree Audit- This is done.

Enhance the major change process- on-going. Just as Admissions was about to launch the Activity Guide functionality in PeopleSoft, the College purchased and directed resources to HighPoint. Work is still being done to finalize the desired outcome for allowing students and counselors to self-change a student's major. Robust discussion about the major change process have occurred between the Admissions, Financial Aid, Records and Evaluations Office. Instead of using an Activity Guide for this work, we are using a consultant to help build a custom electronic form in PeopleSoft. We will need to implement a large-scale information campaign to inform staff and students on how the major change process occurs. Campaigns can be run to make sure students are enrolled in classes that go towards their major or make a correct major change.

Education Planning tool- on-going. Students need to be able to plan their program of study to make an informed decision of their major. HighPoint has a module the District purchased. We look forward to the college implementing and utilizing this module.

## SAO 2

### SAO Title

Expedite and automate credit evaluation for incoming students.

### Assessment Status

☒ Assessed ☐ Not assessed

### SAO Summary and Reflection

This work continues. We will continue to refine automation. We have implemented Transcript Express, along with EDI, that helps speed up the process of entering transfer credit work into PeopleSoft. The next step the Evaluations Office needs to address is to shift from evaluation of transfer credit work at the time of graduation application submission to front end evaluations. This will require an institutional commitment. There may be delays in awarding degrees and certificates initially, but we need to pivot to front end evaluations. Doing so will allow the planning modules of HighPoint (Course Auditor module) to be fully functional. Students will know exactly what degree requirements have already been fulfilled, will allow counselors to better advise students on remaining requirements, will allow Financial Aid and Veterans to remain compliant by paying only on classes that work towards students completing their declared program of study, and will help the college address scheduling needs by determining what classes need to be offered to allow students to meet graduation requirements.

\*\* This is a critically important consideration for the college. For all of the modules of High Point to work most effectively, this office will need the staff and technology to process credit evaluation for incoming students as quickly as possible. This is one reason the Admissions and Records area is asking for a third Business Systems Analyst and why there will likely need to be additional Academic Records Analysts.

## 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

Must have at least two measures. Copy and Paste from previous PRPs or include any new measures developed this year. The default years for the values to be entered are listed in the table heading. If you chose to use data from different years, please list those years in the first row of the table and proceed to enter your measures, values, and definition /description of measure in in rows two and beyond.

### Measure 1

#### Name of Measure

Associate Degree Totals

#### Description of Measure

Number of Associate Degrees Evaluated

#### Year

2018-19

ex: 2017-18

#### Year

2019-20

ex: 2018-19

#### Year

2020-21

ex: 2019-20

#### Year

2021-22

ex: 2020-21

#### Value

2,843

#### Value

3,167

#### Value

2,829

#### Value

2,872

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

### Measure 2

#### Name of Measure

Certificate Totals

#### Description of Measure

Number of Certificate Requests Evaluated

#### Year

2018-19

ex: 2017-18

#### Year

2019-20

ex: 2018-19

#### Year

2020-21

ex: 2019-20

#### Year

2021-22

ex: 2020-21

#### Value

2,856

#### Value

3,125

#### Value

2,663

#### Value

2,894

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

### Measure 3

**Name of Measure****Description of Measure****Year**

ex: 2017-18

**Year**

ex: 2018-19

**Year**

ex: 2019-20

**Year**

ex: 2020-21

**Value****Value****Value****Value**

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

**Measure 4****Name of Measure****Description of Measure****Year**

ex: 2017-18

**Year**

ex: 2018-19

**Year**

ex: 2019-20

**Year**

ex: 2020-21

**Value****Value****Value****Value**

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

**Measure 5****Name of Measure****Description of Measure****Year**

ex: 2017-18

**Year**

ex: 2018-19

**Year**

ex: 2019-20

**Year**

ex: 2020-21

Value	Value	Value	Value
27,773	26,360	29,306	25,744

*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.**

There are many more functions and work the Records and Evaluations Office conducts. We will attempt to submit a supplemental attachment to illustrate.

Based on the data above, students have been completing degree and certificate requirements fairly consistently across the last few years. There has been a moderate drop off during the pandemic, but not as much as anticipated. Meeting state mandated deadlines for MIS and ADT and keeping up with legislative changes has proved to be challenging over the past few years as we had long term vacancies.

*Please explain.*

## **Qualitative Data**

### **Describe any qualitative measures you use and summarize the results.**

As shown, the Records and Evaluations Offices have a tremendous amount of work to do. In order to meet the demands of the office, as well as stay current with updated legislation and state mandated deadlines, we are looking to automate our processes as much as possible. We will be looking to leverage PeopleSoft and HighPoint to help manage the workload and make pertinent information available to students at all times in their student portal.

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

As we work to implement HighPoint, many areas, including Records and Evaluations, will need to think about how to alter business practices, clean up and standardize data and rely more heavily on delivered PeopleSoft functionality. We have been working to maximize PeopleSoft functionality for years, and with the College so heavily invested in HighPoint, all areas of the College that work directly with students and the Student Center will be working towards the common goal of making all enrollment processes an easier one. This will include Admissions, Financial Aid, Records and Evaluations, Cashiering, Outreach, Retention and Instruction.

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## **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!**

Met District and state mandated deadlines (ADT, MIS, etc.): Meeting these deadlines served our students well as they met transfer Admission requirements to their new institutions and helped the college to submit data to the state allowing Palomar to better plan for budget and other annual planning needs.

Rewrote the Academic Standing Process program in PeopleSoft: As part of our on-going data clean-up work, we identified areas we needed to rewrite programmatically in PeopleSoft. The results and outcomes significantly cleaned up data.

Implemented the delivered PeopleSoft repeat checking process: We previously were having to run daily reports to identify students who added classes they previously took and passed. We would then need to manually drop these students and notify them. The delivered repeat checking process is now functional and blocks students enrolling in classes they should not be allowed to.

Parchment transcript vendor migration: The Records Office successfully migrated to our Parchment transcript vendor. Students now have the option to receive or send transcripts via email and are taking advantage of this functionality. In the first 2 months of moving to Parchment, over 90% of our students are selecting the email option of receiving transcripts.

**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?**

1. Changes to the GE requirements have created 4 GE options for students in addition to the multicultural requirement changing to ethnic studies. These are significant changes that require multiple levels of implementation and training among multiple departments.
2. The GE requirement changes have required our office to create additional major codes to accommodate the additional GE requirements. We have created over 400 additional major codes and are working to update the degree advising report.
3. Our office is also creating additional forms to handle the changes, such as Bachelor's degree confirmation form, catalog retention request form, and creating a new major form to include the different GE options.
4. HighPoint Implementation: The College has invested heavily into HighPoint. HighPoint has a more modernized, user friendly look to it. We look forward to implementing HighPoint and working with our campus partners to make the student portal experience a better one.

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

In preparation of our Accreditation site visit this spring, we reviewed and updated our AP's and BP's. As the state transitions out of the pandemic, we will need to closely monitor any temporary changes in legislation made by the Chancellor's Office during the pandemic back to pre-pandemic legislation.

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## **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:**

A majority of the Records and Evaluations Office staff is extremely experienced, knowledgeable and approach their work with a student-centered approach. They have been instrumental in applying changes in technology and implementing new business practices that allow students to better navigate our processes. We will be working this year on creating an electronic major change form for students and counselors to use and an electronic graduation application. The Records Office successfully migrated to our Parchment transcript vendor. Students now have the option to receive or send transcripts via email and are taking advantage of this functionality. In the first 2 months of moving to Parchment, over 90% of our students are selecting the email option of receiving transcripts.

### **Opportunities:**

The HighPoint implementation, specifically Course Auditor, will allow students to track their progress towards completion of their declared program of study, monitor if registered classes will apply to their degree/certificate and monitor if classes are Financial Aid eligible. We will be spending the year documenting processes in HighPoint and creating standardization in processing.

**Aspirations:**

The Evaluations Office aspires to shift from evaluation of transfer credit work at the time of graduation application submission to front end evaluations. This will require an institutional commitment. There may be delays in awarding degrees and certificates initially, but we need to pivot to front end evaluations. Doing so will allow the planning modules of HighPoint (Course Auditor module) to be fully functional. Students will know exactly what degree requirements have already been fulfilled, will allow counselors to better advise students on remaining requirements, will allow Financial Aid and Veterans to remain compliant by paying only on classes that work towards students completing their declared program of study, and will help the college address scheduling needs by determining what classes need to be offered to allow students to meet graduation requirements.

**Results:**

The Records and Evaluations Office has been under staffed for many years. We have overcome some of the short staffing by increasing the use of technology. Our area did an excellent job during the transition to remote work. Going remote, almost overnight, forced our office to go paperless and rely on technology to meet the needs of our students. Now that we have made gains in staffing in Records and Evaluations, we will look to reengage in partnerships across campus to help ensure student success throughout their time at Palomar College.

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## 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.

Click on "+Add Goal" below for each additional goal.

[Click here for previous PRPs with goal information.](#)

## Prior PRP Goals

Click "+Add Goal" below to include additional goals.

### Goal 1

**Brief Description**

Implement Electronic Document Interchange (EDI). EDI allows for incoming electronic transcripts and test scores to be automatically uploaded into PeopleSoft.

Select "+ Add Item" to include additional measures.

**Choice**

☐ Completed ☒ Ongoing ☐ No longer a goal

Add any comments related to your work on prior goal. Include outcomes or progress, successes

**and challenges, and reason(s) for eliminating a goal, if applicable.**

Last year, we implemented the EDI. We are continuing to refine the EDI process. The EDI is a huge time saver and will help increase the accuracy of data entry. We will begin working with the other Region 10 schools to send transcripts to each other electronically, further gaining efficiency. We are removing a large amount of manual work and reducing data entry errors.

## Goal 2

### Brief Description

Generate reports off of Academic Advising data to share with the Instruction Office to help them efficiently schedule classes based on known student need.

Select "+ Add Item" to include additional measures.

### Choice

☐ Completed ☒ Ongoing ☐ No longer a goal

**Add any comments related to your work on prior goal. Include outcomes or progress, successes and challenges, and reason(s) for eliminating a goal, if applicable.**

Originally intended to be a collaborative project with the Instruction Office, this work became more vital with the Degrees When Due initiative and we have worked closely with Counseling on this. Based on the outcomes of the reports, the College can work to inform students of their outstanding requirements to complete their program of study. These reports could lead to stronger retention and completion of their program of study. We look forward to refining this process and seeing if HighPoint can add any assistance.

## Goal 3

### Brief Description

Move transcript processing from the campus to our vendor, Credentials.

Select "+ Add Item" to include additional measures.

### Choice

☒ Completed ☐ Ongoing ☐ No longer a goal

**Add any comments related to your work on prior goal. Include outcomes or progress, successes and challenges, and reason(s) for eliminating a goal, if applicable.**

Credentials sold their company to Parchment. This year, we successfully migrated from the Credentials platform to Parchment. Although we did not move the transcript processing (mailed transcripts) to our vendor, we are now offering transcripts to be emailed to students and their other desired institutions. In the first 2 months, over 90% of requested transcripts from Palomar are requested to be sent via email. This in essence meets our desire to move transcripts processing to avoid the time consuming process of printing and mailing transcripts.

## ESTABLISH GOALS AND STRATEGIES FOR THE NEXT THREE YEARS

In the previous sections of this PRP, you identified opportunities for improvement. Using these

opportunities, develop 3-year [SMART goals](#) for your department. Goals should be Specific, Measurable, Attainable, Relevant, Time-Specific. Ensure your goals align with the mission of your department and/or [the College's Strategic Plan](#).

Please list all discipline goals for this three-year planning cycle.

If you require any additional resources beyond your exiting budget, please be sure to request those resources in the next section titled "Resources".

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

Click "+Add Goal" below to include additional goals.

### Goal 1

#### Description

Implement HighPoint to make the student's use of their student portal and enrollment experience better.

#### How will you complete this goal? Include strategies and a timeline for implementation.

Launching HighPoint's Student Experience will take place in Spring 2023. Implementing HighPoint will be a time consuming process, potentially causing delays in other work getting done. Discussions will need to be had with the VPSS to help determine priorities within our areas.

#### Outcome(s) expected (qualitative/quantitative)

Qualitative: Students will be able to enroll in classes with greater ease, view the classes they enroll in to see if they are payable by financial aid and can verify if the class they are registered in will apply toward the degree/certificate they are working towards.

Quantitative: We will be able to better track students who are working towards their declared program of study or are off track. Enrollment in classes that work toward their declared program of study will also be financial aid eligible, allowing us to see if students are completing their program of study with fewer units.

#### How does this goal align with your department mission statement, the College's Strategic Plan, and /or Guided Pathways?

Students will more efficiently complete their program of study when they clearly know what classes are required based on an accurate major and confirmation that the classes they enrolled in will be applied to their program of study.

#### Expected goal completion date

7/31/2024

### Goal 2

#### Description



Shift from evaluation of transfer credit work at the time of graduation application submission to front end evaluations.

**How will you complete this goal? Include strategies and a timeline for implementation.**

This will require an institutional commitment. There may be delays in awarding degrees and certificates initially, but we need to pivot to front end evaluations. Doing so will allow the planning modules of HighPoint (Course Auditor module) to be fully functional.

**Outcome(s) expected (qualitative/quantitative)**

Students will know exactly what degree requirements have already been fulfilled, will allow counselors to better advise students on remaining requirements, will allow Financial Aid and Veterans to remain compliant by paying only on classes that work towards students completing their declared program of study, and will help the college address scheduling needs by determining what classes need to be offered to allow students to meet graduation requirements.

**How does this goal align with your department mission statement, the College's Strategic Plan, and /or Guided Pathways?**

We anticipate students will complete their program of study in fewer units as they will more easily be able to track their progress towards program completion. The college will also be able to run reports and notify students that appear to be off-track to either revisit course selection or update their major.

**Expected goal completion date**

7/21/2024

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

The Records and Evaluations Offices proudly serve all of those who enter Palomar College's doors. We treat all prospective, current and former students, faculty and staff equitably. We deliver excellent customer service and perform our duties to the highest levels for all of those we work with.

**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.**

Records and Evaluations supports the Vision for Success set forth by Chancellor's Office. We support the Vision for Success goals by informing students where they are in their progress towards completing their program of study, working to develop methods of awarding more certificates and associate degrees, associate degrees for transfer and increasing the number of students transferring to a four year institutions. With Academic Advising, we also support the goals of Vision for Success by decreasing among all students who earned an associate degree in the selected year and who were enrolled in the previous or selected year, the average number of units earned in the California community college system.

Link: [Strategic Plan 2022](#)

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## 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 five parts:

PART 1: Staffing Needs (Faculty and Additional Staff)

PART 2: Budget Review

PART 3: Technology Needs

PART 4: Facilities Needs

PART 5: 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.

**NOTE: All requests listed in the PRP will be reviewed by deans and supervisors, then forwarded to the appropriate review group for prioritization. A resource requests approved to move forward in the review process does NOT guarantee a position or funding.**

## PART 1: STAFFING NEEDS

**This year, units are asked to identify new positions only as part of the PRP process. Vacant positions will be addressed outside of the PRP process.**

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.

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

☐ Yes ☐ No

## REQUEST FOR ADDITIONAL CLASSIFIED, CAST, AA

**Staff, CAST, AA request 1**

**Title of position**

Business Systems Analyst

**Is the position request for AA, CAST, or Classified staff?**

Classified

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

☒ Full Time ☐ Part 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.)**

As the college depends more on technology to learn more about our students, maximize efficiencies in processing and meet compliance and state reporting requirements, we need to have more BSA's. Admissions and Records/Evaluations has only one BSA assigned to each area. The work between Admissions and Records/Evaluations overlaps. In 4 out the last 5 years, we have had a vacant BSA in Records/Evaluations. To fortify this function, we need to have 3 cross trained BSA's to ensure coverage for Admissions and Records/Evaluations to keep up with legislative changes, state reporting requirements and to keep student facing systems running smoothly.

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

This helps the District establish more efficient District Operations through technology. It would be wise to convert 2 vacant Admissions/Financial Aid Specialist positions to fund this BSA position.

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

☐ Yes ☒ No

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

This position is needed to ensure compliance, meet state and federal mandated deadlines, maintain services and hours of operation, increase student success and allowing the college to maximize state funding.

**Strategic Plan 2022 Objective**

<input checked="" type="checkbox"/> 1:1	<input checked="" type="checkbox"/> 1:2	<input checked="" type="checkbox"/> 1:3	<input checked="" type="checkbox"/> 1:4
<input checked="" type="checkbox"/> 1:5	<input checked="" type="checkbox"/> 2:1	<input checked="" type="checkbox"/> 2:2	<input type="checkbox"/> 2:3
<input type="checkbox"/> 2:4	<input type="checkbox"/> 3:1	<input type="checkbox"/> 3:2	<input type="checkbox"/> 3:3
<input type="checkbox"/> 3:4	<input type="checkbox"/> 3:5	<input type="checkbox"/> 4:1	<input type="checkbox"/> 4:2
<input type="checkbox"/> 4:3	<input type="checkbox"/> 5:1	<input type="checkbox"/> 5:2	

Refer to the Palomar College [Strategic Plan 2022](#)

**If the position is not moved forward for prioritization, how will you address this need?**

We will continue to utilize the 2 BSA positions, rely on overtime funds to get the work done, continue a reliance on consultants to help get our work done and will have to reduce the amount of work and support we do for other departments on campus.

## Staff, CAST, AA request 2

### Title of position

Academic Records Analyst

### Is the position request for AA, CAST, or Classified staff?

Classified

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

☒ Full Time ☐ Part 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.)

This position will be instrumental for the move from evaluations happening at graduation to evaluations happening at initial enrollment. This is a technology and staff intensive process requiring additional resources.

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

Completing evaluations for incoming students will reduce workload on Counseling, reduce requisite checking issues, reduce requisite petitions, clarify financial aid eligibility (reducing audit issues and overpayments), and most importantly this will provide students with a more accurate and clear pathway to graduation - enhancing our SCFF metrics.

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

☐ Yes ☒ No

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

This position will assist in transitioning the college to evaluating credit on initial enrollment rather than an "after the fact" evaluation at graduation.

### Strategic Plan 2022 Objective

- |   |   |   |   |
|---|---|---|---|
| <input checked="" type="checkbox"/> 1:1 | <input checked="" type="checkbox"/> 1:2 | <input checked="" type="checkbox"/> 1:3 | <input checked="" type="checkbox"/> 1:4 |
| <input checked="" type="checkbox"/> 1:5 | <input checked="" type="checkbox"/> 2:1 | <input checked="" type="checkbox"/> 2:2 | <input type="checkbox"/> 2:3            |
| <input type="checkbox"/> 2:4            | <input type="checkbox"/> 3:1            | <input type="checkbox"/> 3:2            | <input type="checkbox"/> 3:3            |
| <input type="checkbox"/> 3:4            | <input type="checkbox"/> 3:5            | <input type="checkbox"/> 4:1            | <input type="checkbox"/> 4:2            |
| <input type="checkbox"/> 4:3            | <input type="checkbox"/> 5:1            | <input type="checkbox"/> 5:2            |   |

Refer to the Palomar College [Strategic Plan 2022](#)

### If the position is not moved forward for prioritization, how will you address this need?

We are continuing to use technology to assist with our initiatives. Not funding this position will not halt our mission but would likely make full implementation very difficult.

## PART 2: BUDGET REVIEW

Review your Budget/Expenditure reports for 2019, 2020, 2021. 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?**

☐ Yes ☐ No

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

## **PARTS 3, 4 and 5 – TECHNOLOGY, FACILITIES AND OTHER NEEDS**

1. One-Time Fund Requests. Through the PRP process the college implements an approach for prioritizing and allocating one-time needs/requests. Prioritization takes place through the appropriate groups, leadership, and the Budget Committee. The executive team and Resource Allocation Committee consider various sources for funding PRP requests. Resource requests also inform the larger planning process like Scheduled Maintenance Plans, Staffing Plans, and institutional strategic planning.

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

If you are a CTE program and think you may qualify for CTE funds for your PRP request(s), you are **STRONGLY** encouraged to answer the call for Perkins/Strong Workforce grant applications in February. Contact the Dean of CTEE for additional information.

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. Requests for technology and facilities are assessed by the Deans and then, if appropriate forwarded to the proper institutional group (e.g., technology review committee, or facilities) for review and feedback.

### **PART 3: TECHNOLOGY NEEDS**

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

☐ Yes ☐ No

### **PART 4: FACILITIES REQUESTS**

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

☐ Yes ☐ No

***Please include only those facilities requests that could be accomplished within a one-year time frame and/or under a \$75,000 estimated amount. Other facilities needs, such as buildings or remodels, should come through the long-range facilities planning process.***

## PART 5: OTHER 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?**

☐ Yes ☒ No

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

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

bmoos@palomar.edu

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

Page 5 will show for reviewers (VP and/or Planning Councils) upon submission of the 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 Immediate Supervisor.

**Immediate supervisor who reviewed PRP:**

Kendyl Magnuson

**Sign Date**

11/27/2022

*If you are both the immediate supervisor and the VP for this area, please skip to the Vice President (or President) Review below.*

## FEEDBACK

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

The Records and Evaluations Office has done an outstanding job of keeping things going despite the having six unfilled positions for over 2 years. This year we filled two Academic Record Specialist positions (Records) and two Academic Records Analysts (Evaluations). To make the deadlines the office relied heavily on Overtime. So much so, that it has been hard of the existing staff and at a level that is unsustainable both for the staff and the budget. The filled vacancies will relieve much of this burden, but with the desire to move evaluations from graduation to initial enrollment, there will be a significant increase in workload and new burdens to address.

**Areas of Concern, if any:**

Moving from evaluations at graduation to initial enrollment is crucially important to the college and our students, but it will be a significant change for the college and a significant increase in workload. The additional Business Systems Analyst will be crucial if we hope to achieve this and the additional Academic Records Analyst will be needed to fully implement this goal.

**Recommendations for improvement:**

Continue to leverage technological solutions such as Electronic Data Interchange and fully utilizing PeopleSoft automation to as a first step to our goals.

## **Vice President (or 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:**