“CLOSING THE LOOP”
Annual Plan Database Training
March 2007
Objectives

• Differentiate annual plan from strategic plan.
• Utilize the Annual Plan Database to input department/program annual strategies.
• Review the modules within the annual plan database including the “roll over” feature.
• Describe potential revisions to the database.
• Describe how the end-of-year annual plan results are used to “close the loop.”
• Describe the significance of “closing-the-loop.”
OUTLINE

Introduction

I. Review - Strategic Plan/Annual Strategies

II. Annual Plan Database

III. Update Database/Closing-the-Loop
   I. Quality Improvement
   II. Follow-Up
   III. Roll-Over
   IV. Calendar

IV. On the Horizon

V. Questions

VI. Evaluation of Session
WHY STRATEGIC PLANNING?

“It takes more than an expressed interest in change to build a high-performing institution. It takes the will and the commitment to change, a deep understanding of the institution’s culture and its capacity, and a strategic perspective about its future.”

Richard Alfred, Community College Journal, June/July 2003

• **Effective strategic planning processes help institutions consistently address the challenges facing community and technical colleges today:**
  - Demographic shifts (i.e., Adult Learners, Hispanic Citizens)
  - Increased Customer Expectations
  - Demands of Accountability
  - Changing Technological Needs
  - Economic Demands

• The strategic planning process helps staff think about long-term strategic investment rather than short-term fixes

• A well developed strategic plan assists an institution in weathering demanding times/periods

• A good strategic plan guides an institution toward more effective use of resources

• The strategic planning process provides opportunity to build greater community trust and participation in decision making

• A strategic plan helps attract additional resources (institutions with well-developed strategic plans are far more likely to receive additional resources)

• **Vital strategic plans are valuable evidence to accrediting bodies**

• **Strategic plans can allow for documented recognition of programmatic and/or campus differences**
BLUEGRASS COMMUNITY & TECHNICAL COLLEGE
Institutional Effectiveness Program Model

1. Develop Annual Plans
   - Set budget Priorities
   - Make Strategic Adjustments
   - Units Develop Annual Plans with Unit Goal tied to Strategic Plan, measurement defined & responsibility assigned

2. Operationalize Annual Plans & Deliver Programs/Services
   - Units pursue annual goals and measure progress
   - Programs/Services delivered with focus on strategic and unit goals

3. Measure Progress/Evaluate Results
   - Units assess & evaluate progress toward goals and report results
   - Progress toward other accountability measures evaluated

4. Use of Results for Improvement/Communicate Findings
   - Units progress toward goals shared with decision makers
   - Progress toward other accountability measures shared with community

5. Outcomes Assessment
   - Evaluation of progress toward strategic goals
   - Program review outcomes
   - Surveys & Evaluations
   - Accreditation and audits

Five-Year Strategic Plan

Five-Year Strategic Plan

July

August-September

September-April

Ongoing
REVIEW

- Annual Plan vs. Strategic Plan
- What are annual strategies?
- Purpose of the Database
GOAL AND STRATEGY TIPS

GOAL vs. STRATEGY
The “Goal” is the destination while the “Strategy” is the mechanism or pathway to achieve the goal.

Strategies should be:
- **S**pecific and focused on one idea
- **M**easurable and if possible, quantifiable (e.g. “increase by 5%” by fall 2006)
- **A**ction oriented (create, demonstrate, develop, establish, implement, increase . . .)
- **R**elevant to the college mission, focus areas, and goals
- Include a **t**imeline (starting/ending point)
DATABASE

- September Training Session
  - Use of database by annual plan coordinators
  - Explanation of various fields within database
    - Input annual initiatives with strategies
    - Justification and links to strategic plan
  - Resources
  - Measures
- Other Fields
  - Progress
  - Follow-up/“Closing the Loop”
CLOSING-THE-LOOP

- Decision-making
- Budget
- Quality of Education
- Continuous Quality Improvement

Activity (Strategy)
(Revised Activity)

Determine Threshold (Target)

Evaluate and Report

Activities

Bluegrass
Community & Technical College

KENTUCKY COMMUNITY & TECHNICAL COLLEGE SYSTEM
UPDATING DATABASE

Review Input, key measure

First year “guestimate”

☐ Compile Results/Document

☐ Evaluate Findings

New Strategy

Revise

Rollover

Abandon
## CALENDAR

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<tr>
<th>Month</th>
<th>Date</th>
<th>Activity</th>
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<tr>
<td>September</td>
<td>9/5/06</td>
<td>2005-06 Annual Action Plan Report to President’s Cabinet</td>
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<td>9/13/06</td>
<td>President’s Leadership Team Planning Retreat</td>
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<td>9/27/06</td>
<td>Annual Plan Database Training</td>
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<td>9/28/06</td>
<td>Annual Plan Database Training</td>
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<td>9/30/06</td>
<td>2006-07 Annual Strategy Priorities established</td>
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<td>October</td>
<td>10/15/06</td>
<td>Deadline for all Units/Programs annual plans (annual strategies) into Annual Plan Database</td>
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<td>December</td>
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<td>Deadline for mid-year progress into 2006-07 Annual Plan Database</td>
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<td>February</td>
<td>2/5/07</td>
<td>Mid-year Annual Plan Progress Report to President’s Cabinet</td>
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<td>April</td>
<td>4/18/07</td>
<td>President’s Leadership Team Planning Retreat (for 2007-08)</td>
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<td>May</td>
<td>5/01/07</td>
<td>Deadline for all Units/Programs to record progress made on 2006-07 annual plans (strategies).</td>
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<td>5/15/07</td>
<td>2007-08 Annual strategies into Annual Plan Database</td>
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<td>June</td>
<td>6/15/07</td>
<td>Strategic Plan Progress Report to Board</td>
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<td>August</td>
<td>8/6/07</td>
<td>2006-07 Annual Action Plan Participation Report to President’s Cabinet</td>
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TO DO LIST

- Finalize 2006-07 Annual Plans
- Print 2006-07 results
- Discuss findings with peers and leadership
- Determine corrective action/follow-up based on findings
- Establish 2007-08 new strategies
### ON THE HORIZON

- **IE Web model**
- **Financial Information**

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QUESTIONS/DISCUSSION

- Suggestions to improve the database
- Questions
- Document Professional Development in ITES
- Evaluation
Karman K. Wheeler

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246-6567