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The Purpose of Planning

Continual planning and assessment processes are critical to maintaining and improving upon the institutional effectiveness of Wharton County Junior College (WCJC). Moreover, the institution uses data to monitor institutional outcomes and demonstrate progress toward the achievement of the WCJC mission. As such, the Office of Planning and Institutional Effectiveness works to promote an institution-wide culture of continuous quality improvement through the systematic review of institutional and unit-driven goals and outcomes.

Planning efforts at WCJC are focused on ensuring that the institution is operating in a manner that is both efficient and effective. Efficiency of the institution is focused on ensuring that the resources allocated to initiatives across the institution are optimized, while efficacy refers to the ability for WCJC to achieve desired outcomes and results. By engaging in continuous and purposeful planning practices, WCJC is able to readily identify areas of strength and weakness across the institution, use data to inform decisions related to the modification of strategic initiatives, and improve upon desired outcomes.

In addition, the WCJC planning process is designed to ensure that all divisions across the institution align their unit-specific mission, goals, and outcomes to the overarching goals and objectives of the WCJC Strategic Plan. This alignment provides opportunities through which the institutional strategic plan can be made more robust, specifically through the inclusion of outcomes and strategies that are implemented within individual units. Moreover, this method of cross-referencing the institutional mission and goals within each of the division plans helps to monitor and confirm the inclusivity of the overarching WCJC Strategic Plan.
Planning Considerations

Prior to the initiation of any new or revised planning projects, considerations must be made with regard to several key tenets that serve as the basis for all aspects of the institutional effectiveness process at WCJC.

**WCJC Mission Statement**

The central driver for all planning efforts within the institution is the WCJC Mission Statement. By aligning all plans, programs, and projects to the mission, WCJC maintains the integrity of the principles that have been established as the foundation for the college. The WCJC Mission Statement is as follows:

Wharton County Junior College is a public, two-year, comprehensive community college offering a wide range of post-secondary educational programs and services including associate degrees, certificates, continuing-education courses, cultural affairs, and leisure-time activities for the benefit of the community and a population of students that varies in age, background, and ability.

The college affords opportunities for individual growth and expression and promotes the development of the total person through scholarly and creative activity and the application of knowledge for the good of society. Its curricular and co-curricular activities lay a foundation for lifelong learning and involved citizenship and encourage the pursuit of knowledge, innovation, experimentation, and excellence in human endeavor. It prepares students for entry-level positions, for advancement in various occupations and professions, for a broad understanding of the liberal arts and sciences, and for transfer to baccalaureate granting institutions.

In fulfilling its mission, the college:

1. Offers associate of arts, associate of arts in teaching, and associate of applied science degrees;
2. Offers transfer curricula in preparation for the baccalaureate degree;
3. Offers career/vocational curricula leading to certificates and associate degrees;
4. Offers remedial and developmental courses and services, as well as adult basic education, to assist under-prepared students to achieve competency in basic skills and thus gain access to college-level programs;
5. Supports excellence in instruction in all academic areas by the encouragement of faculty professional development for the improvement of teaching and learning through innovative teaching methodologies, research and public service;
6. Provides library and other instructional resources as integral parts of the educational process;
7. Supports students in the learning process through counseling and academic advising;
8. Offers continuing-education noncredit courses and programs to meet the needs of business, industry, government, and the community-at-large, and to contribute to the economic development of its service region;

9. Provides varied cultural opportunities, recreational activities, and community services to enhance the quality of life in its service region;

10. Actively cooperates with school districts, vocational-technical schools, other colleges, and universities to promote a more productive educational environment within its service region;

11. Encourages the innovative and effective use of technology to increase and enrich educational opportunities for students and the community.

Wharton County Junior College is an institution that emphasizes personal attention to students, innovation and flexibility in its credit and noncredit offerings, and responsiveness to the diversity of communities it serves. The college is dedicated to providing an educational environment that recognizes individuality, stresses the importance of human relationships, and reflects the democratic values of our society.

**SACSCOC Principles of Accreditation**

Institutional effectiveness processes are also significantly informed through the expectations established in the Southern Association of Colleges and Schools Commission on Colleges (SACSCOC) Principles of Accreditation.

Standard 7.1 states “The institution engages in ongoing, comprehensive, and integrated research-based planning and evaluation processes that (a) focus on institutional quality and effectiveness and (b) incorporate a systematic review of institutional goals and outcomes consistent with the its mission.”

Standard 7.3 states “The institution identifies expected outcomes of its administrative support services and demonstrates the extent to which the outcomes are achieved.”

Standard 8.1 states “The institution identifies, evaluates, and publishes goals and outcomes for student achievement appropriate to the institution’s mission, the nature of the students it serves, and the kinds of programs offered. The institution uses multiple measures to document student success.”

Standard 8.2.c states “The institution identifies expected outcomes, assesses the extent to which it achieves these outcomes, and provides evidence of seeking improvement based on analysis of the results for academic and student services that support student success.”
Institutional Strategic Planning

“Everyone is a Strategic Planner…”

George Keller in Academic Strategy

The WCJC Strategic Plan serves as the institutional roadmap toward an improved future, decidedly focused on enhanced student achievement and success. The Strategic Plan serves as an impetus for growth, change, and innovation by establishing a common vision for the campus community as a whole. Developed through broad-based institutional input, the Strategic Plan encourages forward motion in the face of a continually changing environment.

The WCJC Strategic Plan is developed based on a five-year timeframe, allowing for sufficient time to determine the efficacy of initiatives. The plan development process involves multiple phases, including:

- A comprehensive review of institutional and environmental data;
- Development of institutional goals, outcomes, strategies, and performance measures;
- Ongoing monitoring and assessment of results;
- Utilization of data to make informed decisions regarding future actions;
- Continual communication regarding planning progress to the campus community.

Data Collection and Analysis

Strategic plan realignment efforts will begin with a comprehensive review and analysis of data. Both quantitative and qualitative data will be collected from a myriad of sources, including institutional reports, a comprehensive SWOT analysis, constituent surveys, and focus groups, and used as the foundation for the development of the new Strategic Plan.

Review of Institutional Reports

A comprehensive review of institutional data will be conducted by the Vice President for Planning and Institutional Effectiveness (VPPIE) to serve as the basis for all planning efforts. Data reviewed by the VPPIE will include:

- Current Strategic Plan Key Performance Indicators
- IPEDS Data Feedback Reports
- THECB Accountability Reports
- LBB Indictors
• CCSSE, SENSE, and Noel Levitz Student Surveys
• Action plans and reflections for institutional initiatives, namely Achieving the Dream, Texas Success Pathways, and Houston GPS

Information from these reports will be compiled into a comprehensive analysis that will be shared with the WCJC Board of Trustees prior to the initiation of a new Strategic Planning cycle. In addition, the analysis will be shared with various institutional constituents as they engage in planning initiatives during the development of the new plan. Finally, town hall sessions will be held at each campus during which information from the review will be shared with the intent and opportunity for faculty, staff, and students to ask follow-up questions regarding the findings. Town hall presentations will take place in August of those years where a new Strategic Plan is developed.

Program Demand Gap Analysis

The college will also conduct a comprehensive Program Demand Gap Analysis (PDGA). This analysis will explore all current programs offered at WCJC, comparing the supply of students with the regional job demand. In addition, the PDGA will outline current programs which may be at-risk for closure, current programs in need of expansion, and potential future programs that may be worth considering based on market needs.

Environmental Analysis

In order to fully consider influencers external to the college, the institution will conduct a comprehensive environmental scan to provide foundational data from which to make informed decisions regarding the future of the institution. The analysis will be framed using the STEP methodology, which includes data and research related to four core external influencing factors, namely:

- *Socio-cultural changes*, including demographic shifts and educational attainment;
- *Technological trends*, including pervasiveness of technology and impact on future job markets;
- *Economic fluctuations*, including job demand and salary changes; and
- *Political developments*, including changes in legislation and reporting requirements.

In addition to current conditions in the environment, the analysis includes projections, where possible, related to impacts of these environmental changes on the future of the college.

Administration of the Institutional Capacity Assessment Tool

Additional data related to the institution’s current state will be provided through the Institutional Capacity Assessment Tool (ICAT). Developed and administered by Achieving the Dream, the ICAT gathers faculty and staff feedback regarding institutional strengths and weaknesses within each of seven key areas, namely:
• Leadership and Vision
• Data and Technology
• Equity
• Teaching and Learning
• Engagement and Communication
• Strategy and Planning
• Policies and Practices

Data from the ICAT will be reviewed both as a holistic data set and disaggregated by campus to help develop more nuanced planning protocols across each location.

Completion of a Comprehensive SWOT Analysis

Following the review and presentation of institutional data, a comprehensive analysis of the institution’s Strengths, Weaknesses, Opportunities, and Threats (SWOT) will be conducted (Hopkins et al., 2013). Several sessions will be offered across all campus locations to ensure broad-based participation and inclusive representation of the issues facing each campus and the institution as a whole. Faculty, staff, and administration from across the institution will be asked to participate in the analysis to ensure the development of an accurate representation of the institution. Data previously reviewed by the VPPIE will be presented at the start of each SWOT session to provide a baseline for comparison and a reference point for the broader group discussion. Each area of the SWOT analysis should be reviewed in detail so that a holistic picture of the institution can be developed. The analysis should include the following information (Aithal & Kumar, 2015):

• Strengths: Strengths include those areas in which the institution excels and which lend the institution consistency. Strengths will lend themselves toward the achievement of the institutional mission and goals. It is important to remember that strengths are those characteristics and qualities that are internal and (to a degree) within control of the institution.

• Weaknesses: Weaknesses include those areas which deteriorate the institution and prevent the organization from growing and succeeding. Weaknesses prevent the achievement of the institutional mission and stagnate progress. It is important to remember that weaknesses are those characteristics and qualities that are internal and (to a degree) can be controlled and/or mitigated.

• Opportunities: Opportunities are those external factors which may benefit the institution if recognized and grasped. It is important to remember that opportunities arise from the environment surrounding the institution and are not able to be controlled or created; only identified and leveraged.

• Threats: Threats are those external factors that may challenge or threaten an institution. It is important to remember that threats arise from the environment
surrounding the institution and are not able to be controlled or created. However, when an institution recognizes threats, actions can be taken to overcome or soften the impact of these external forces.

Themes emerging from the institutional SWOT analyses will be compiled and analyzed by the VPPIE and a final report will be published on the IE website. SWOT sessions will be held during September with a final report provided to the public by October of planning years.

**Constituent Surveys and Focus Groups**

The VPPIE will assess the need to distribute surveys and conduct focus groups based on the results of the institutional data review and SWOT analysis. Surveys and focus groups will be geared toward specific audiences in order to provide more nuanced data related to findings arising from previous initiatives and to enhance institutional engagement within the planning process (Lewis, et al., 2014). Constituent feedback will be collected and analyzed by the VPPIE with themes disaggregated based on relation to each strategic plan goal. All surveys and focus groups will be conducted by December 2018.

**Strategic Plan Development**

Following a comprehensive review of institutional data, WCJC will engage in a series of initiatives geared toward the development of a new Institutional Strategic Plan. The Strategic Plan development phase will include the establishment of a task force to establish institutional priorities, the continued work of individual task forces for each of the institutional goals identified, the designation of funds specifically for strategic initiatives, and the development of unit-specific planning and assessment reports.

**Institutional Priorities Task Force**

In order to ensure broad-based participation into the development of the Strategic Plan, a task force will be established that will include a cross-section of members from across the institution, including faculty, staff, administration, and students (when applicable). This task force, to be chaired by the VPPIE, will review all data reports, the SWOT analysis, and the results from the surveys and focus groups, and identify 4-6 key priorities in need of attention and improvement within the institution. These priorities will be written as comprehensive, institutional Strategic Goals which will then be submitted to the Executive Cabinet and Board of Trustees for review and final approval. Strategic Goals will be identified and submitted for approval by February of a given planning year.
Goal-Specific Task Forces

Following establishment of the Strategic Goals, a separate task force will be developed for each of goal, generally comprised of members who served on the initial task force and including those faculty, staff, administration, and students (Lewis, et al., 2014) who maintain a direct, vested interest in that goal. Composition of each TF will be determined and approved by the Executive Cabinet to ensure broad-based and inclusive representation across all units, divisions, and campuses. In addition, task force members must be able to serve as institutional role-models throughout the strategic planning process by communicating with constituents, as appropriate, and acting as early adopters for strategic initiatives (McClesky, 2014).

The purpose of each task force will be to conduct brainstorming sessions related to the fruition of their respective goals (Testy, 2015). Each task force will be responsible for:

- Developing SMART outcomes related to the achievement of their specific goal (Morrill, 2013).
- Identifying key strategies that directly correlate to the achievement of each outcome.
- Determining the appropriate measures and targets for each outcome/strategy.
- Identifying the appropriate responsible office/individual in charge of each outcome.
- Establishing timelines for completion of each outcome/strategy.

The VPPIE will serve as the co-chair for each task force to help facilitate forward motion and completion of tasks. In addition, it will be the responsibility of the VPPIE to communicate progress of each task force to the appropriate individuals, including the President, Executive Cabinet, Board of Trustees, parties responsible for outcome/strategy oversight, as well as the greater campus community as a whole (Bass, 2011). Outcomes, strategies, measures, and timelines will be in place for each goal by May of each planning year.

Designation of Available Funds

Throughout the planning stages, the VPPIE will coordinate with appropriate personnel to ensure that funds are available to fully support and implement the strategies identified by each TF (Bolman & Gallos, 2011). A comprehensive review of funds will include:

- Submitting requests for additional funds based on initiatives identified within the Strategic Plan.
- Establishment of a recurring fund of money devoted to special projects and/or support for the Mid-Management Leadership project proposals.
• Identifying potential external sources of funding that can be used to fulfill strategic goals and outcomes.

**Ongoing Monitoring and Assessment**

Following development of the Institutional Strategic Plan, in institution will engage in a process of continual assessment in order to monitor progress toward the completion of goals and gauge success of the various outcomes, strategies, and initiatives. Assessment results and analyses are used to inform decisions regarding the need for modifications to the Strategic Plan. Year-end findings are then communicated out to the larger campus community in an effort to keep constituents informed and invested in the planning process.

*Annual Strategic Plan Assessment Report*

At the end of each fiscal year, the VPPIE develops an annual Strategic Plan Assessment Report which includes results for all measures and targets established for each of the Strategic Goals. This report will serve as the primary mechanism for communicating annual Strategic Plan outcomes to the campus community and will be formally presented by the VPPIE during the October Executive Cabinet and Board of Trustees meetings. The Strategic Plan Assessment Report will also serve as the foundation for making strategic decisions regarding the need to modify the WCJC Strategic Plan and/or develop action items for enhancing institutional outcomes in the following fiscal year.

*Institutional Effectiveness Council*

Upon completion of the realignment efforts, the goal-specific task forces will be disbanded and a new Institutional Effectiveness Council (IEC) will be developed. The charge of the IEC will be to monitor progress of the Strategic Plan through the ongoing evaluation of strategic outcomes and the assessment of those measures identified for each of the institutional goals (McClesky, 2014). In addition, the IEC will make recommendations for changes to the Strategic Plan that are data-informed and backed by best-practices. The IEC will be comprised of faculty, staff, and administration nominated by their respective VPs, with initial representation coming from each of the goal-specific task forces to provide cohesiveness between the initial planning and assessment phases. The VPPIE will serve as Chair for the Council with all members being approved by the Executive Cabinet. Members of the IEC will serve a two-year term with new members coming on in the Fall of even-numbered years.

The IEC will meet on a monthly basis throughout the academic year in order to allow for continual monitoring of the WCJC Strategic Plan. The Council will be responsible for:

• Reviewing KPI data on a regular basis to monitor outcomes in “real time”.
• Contributing to the annual Strategic Plan Assessment Report, as needed.
• Utilizing the annual Strategic Plan Assessment Report to develop a comprehensive action plan, including potential modifications, additions, and deletion of outcomes and strategies, for the following academic year.
• Determining the need for adjustments to institutional measures and targets based on previous years’ findings.
• Establishing responsible parties and timelines for completion of the action plan.
• Serving as ambassadors for the Strategic Plan by communicating with their divisions/departments about outcomes, strategies, and results, as appropriate.
Unit Planning

In addition to the institutional strategic planning process, all administrative units must also engage in active planning and assessment practices that, while aligning with the WCJC goals, provides a clear roadmap for operational advancements specific to that division. Due to the specificity of these unit plans, the planning timeframe is abbreviated from a five-year to a three-year timeframe, allowing for enhanced agility within the planning process.

Unit Self-Studies

Upon initiating the planning process, each unit must first conduct a comprehensive self-study in order to conduct a holistic evaluation of current processes, procedures, and policies. Self-studies are conducted in the months preceding the development of a new strategic plan and provide a structured method for identifying strengths and weaknesses within a division. The self-study process serves as the informational foundation from which a strategic plan is built, allowing for thoughtful conversations to evolve into actionable strategies for improvement.

Unit self-studies must include (at minimum) the following information:

- A review of the most recent Unit Assessment Plan and Assessment Reports.
- A description of the primary services offered within the unit and the operational processes in place to address each service.
- Identification of services that should/should not be offered within the unit and justification as to why.
- Current resource allocations (Note: resources include staff, space, equipment, knowledge/skills, and funds).
- Comprehensive SWOT analysis.
- Summary of input from key stakeholders.

Following completion of the self-study, a summary report should be submitted to the respective Vice President for that unit, as well as the VPPIE, for review and input prior to the initiation of the development of the unit strategic plan.

Unit Assessment Plans

At the beginning of each three-year cycle, administrative units must develop and submit for approval their Unit Assessment Plan. All Unit Assessment Plans must follow a standard template, developed by the VPPIE and approved by the President, to ensure consistency of planning efforts across the institution. All components of the planning template have been included based on best practices in the area of assessment and to help units develop robust plans that support the accomplishment of institutional goals along with unit-specific ones.

- **Mission:** A statement detailing the shared purpose of the division and those activities and individuals necessary to the fruition of that purpose. The mission statement for a unit should be written as a set of priorities shared by members of that unit.
• **Goals:** Those end results which, when brought together, allow for a unit to achieve its overarching mission. Goals are generally written as broad statements that describe what the organization wants to accomplish.

• **Outcomes:** Statements that “detail the activities that must be completed to achieve the goal”. Outcomes, sometimes called objectives, should be clear and concise statements that follow a SMART outline:
  
  o **Specific:** An outcome must include all relevant details regarding what is to be accomplished.
  
  o **Measureable:** An outcome must be able to be evaluated and linked to targets of achievement.
  
  o **Achievable:** An outcome must be realistically able to be accomplished, given the resources available and current climate within a given unit/population.
  
  o **Relevant:** An outcome must align with the goal that it has been identified to support. In other words, achievement of an outcome should put a unit one step closer to accomplishing its goals.
  
  o **Timely:** An outcome should have a timeline for completion.

• **Strategies:** Detailed and distinct steps that lead to the accomplishment of a given outcome. Strategies should serve as milestones to help a unit track progress toward a given task and allow for in-the-moment monitoring of outcome completion. It is important to remember that strategies are the namesake of the strategic plan. As such, to be wholly effective, strategies should include:
  
  o A timeline for completion,
  
  o Identification of the party responsible for oversight of the strategy, and
  
  o Associated budgetary considerations.

• **Key Performance Indicators (KPIs):** Metrics which allow for analysis of performance and progress. Each outcome should have a distinct set of associated KPIs to help in determining whether that outcome has been achieved or not. KPIs ultimately provide the findings which indicate efficacy and efficiency within a unit; however, when developing a plan, it is important that the number of KPIs included is manageable. More data does not always result in a better plan.
When identifying KPIs, units should attempt to include both quantitative and qualitative data, when possible:

- **Quantitative:** Objective data, represented numerically, which can produce conclusive results regarding how many or how much of something there is. Data analysis may require some statistical knowledge.

- **Qualitative:** Subjective data, generally including descriptions of characteristics of an object or event, that is exploratory in nature. Data analysis is non-statistical; however, results may still be vital in forming a complete understanding of a phenomenon or event.

In addition, when developing a set of KPIs, indirect measures may be included. However, at least one direct measure is required for the support of each identified outcome:

- **Direct:** Measures that provide data of actual outcome occurrences, such as the number of advising sessions per student, the time spent per employee on a project, the money saved on an initiative, or the guidelines related to a process.

- **Indirect:** Measures that allow for inferences to be drawn regarding an outcome, generally based on perception, such as efficacy of advising sessions based on student survey feedback or efficiency of a process based on employee focus groups.

- **Targets:** The level of performance set for each KPI against which results can be compared. Targets must be in place to set the standard for outcome completion, as well as to indicate the efficiency and efficacy of a strategy. Targets may be set using:

  - **Internal benchmarks:** Data based on previous performance within the unit.

  - **External benchmarks:** Data based on national standards or peer-institution performance.

A sample template for a Unit Assessment Plan is included as Appendix A in this document.
Unit Assessment Reports

*However beautiful the Strategy,*

*you should occasionally look at the Results.*

-Sir Winston Churchill

Toward the end of each fiscal year, administrative units must complete and submit for approval their annual Unit Assessment Report. Unit Assessment Reports include all of the components required in the Unit Strategic Plan, plus additional information related to the implementation and results of the plan. All components of the reporting template have been included based on best practices in the area of assessment and to help units analyze their performance and develop comprehensive action plans for improving outcomes in the future.

In addition to the Mission, Goals, Outcomes, Strategies, KPIs, and Targets, Unit Assessment Reports must include:

**Results:** Data, either quantitative or qualitative, which indicates the actual performance for each KPI. In addition to the data, a complete result will include an indication as to whether or not the target for that KPI was met.

**Analysis:** A brief explanation of the results, specifically to include a description of any mitigating factors that may have impacted the achievement of various outcomes. The analysis section should include any information that is needed to provide better context and/or a full understanding of the implementation process.

**Action Plan:** Next steps in the planning process. Action items must be included for each outcome, regardless of whether or not all targets were met. Action items must be data-driven, meaning that they should be rooted in the findings presented in both the results and analysis sections of the report. In addition, the action plan must provide a clear description of how the unit will move forward during the next iteration of the planning phase in order to continue on the path to improvement.

**Supplemental Documentation:** Any reports, surveys, guidelines, proposals, etc. that are directly linked to a particular outcome, KPI, or result. Supplemental documents are not required, but are encouraged in those cases where additional context or clarification may be necessary.

Units will also be asked to provide an overarching executive summary which highlights the major initiatives that the unit engaged in during the prior fiscal year, the outcomes that were achieved and those which require additional attention, and the action plan items that will serve as the primary guide for moving forward during the next assessment cycle.
Unit Timelines

The processes outlined within this guide relate to those administrative units which are non-academic in nature and cover a substantive breadth of function within the institution. The following units are included within the framework described above based on the following timelines:

Cycle 1:

- Administrative Services (Bryce Kocian)
  - Campuses
    - Wharton
    - Bay City (Gloria Crockett)
    - Richmond (Robert Wolter)
    - Sugar Land (Eric Malmberg)
  - Business Office (Gus Wessels)
  - Facilities (Michael Feyen)
  - Payroll and Benefits (Rachel Bahnsen)
  - Purchasing (Philip Wuthrich)
  - Security and Public Safety (Daniel Terronez)
- Planning and Institutional Effectiveness (Amanda Allen)
  - Institutional Research (Tessa Mathews)
- Student Services (Dave Leenhouts)
  - Academic Advising and Counseling (Susan Denman-Briones)
  - Admissions and Registration (Karen Preisler)
  - Financial Aid (TBD)
  - Orientation (Susan Denman-Briones)
  - Residence Life
  - Student Recruitment (Julie Aaronson)
  - Testing Services (Leslie Kolojaco)

Cycle 2:

- President's Office (Betty McCrohan)
  - Athletics (Gene Bahnsen)
  - Human Resources (Judy Jones)
  - Grant Writing and Compliance (Marybelle Perez)
    - TRIO SSS (Jessica Falcon)
  - Marketing and Communication (Zina Carter)
- Instruction
  - Adult Education and Literacy (Taraneh Zekavat)
  - Continuing Education (Alice Atkins)
  - Distance Education (Michele Betancourt)
  - Library (Kwei Feng Hsu)
  - Retention, Dual Credit, and University Transfer (Natalie Stavinoha)
- Sr Citizens Program (Megan Wilcox)
  - Tutoring (Natalie Stavinoha)
- Technology (Pam Youngblood)
  - Security (James Bullock)
  - Database & Application Services (Bryan Chuc)
  - Help Desk & Training (Robert Falco)
  - Information Systems Services (Mitch Nguyen)
  - Network Services (John Miller)
  - Web (Eric Li)
Planning Cycle and Timeline

To ensure continual monitoring of goals and outcomes, WCJC engages in a cycle of continuous quality improvement. This cycle (Figure 1) delineates each stage of the continuous planning and assessment process and are monitored and updated annually by the VPPIE.

*Figure 1. WCJC Planning Cycle*
Update Unit Mission, Goals, & Outcomes

Units will mark the beginning of each new planning cycle with a comprehensive review of their mission, goals, and outcomes. These three areas mark the highest level of the Unit Strategic Plan and set the vision and tone for all remaining sections. All changes in these areas should evolve directly from the previous cycle’s action plan and be rooted in data. That being said, it is not uncommon for there to be little to no variation in the mission, goals, and even outcomes from one year to the next. This phase of the cycle should be completed by October 15.

Design & Revise Strategies, KPIs, & Targets

Subsequent to the update of the unit-specific mission, goals, and outcomes, units will design and revise their strategies, KPIs, and targets for the upcoming fiscal year. As previously discussed, all strategies, KPIs, and targets must directly link to at least one of the unit outcomes. Similar to the previous phase of the assessment cycle, all changes made to these assessment items should evolve directly from the previous cycle’s action plan and be rooted in the data that was gathered in the year(s) before. The majority of the changes to the Unit Strategic Plan will be made during this stage of the assessment process. Once finalized, units must submit their Unit Strategic Plan to the VPPIE. This phase of the cycle should be completed by October 15.

Implement the Plan & Collect/Monitor Data

Following the completion of a division’s Unit Strategic Plan, it is the responsibility of the individuals in that unit to ensure that the plan is implemented and monitored throughout the remainder of the year. In addition, units should actively work to collect and track any data that is outlined within their KPIs so that they may report results at the end of the fiscal year. If a plan has been designed well, implementation and data collection should occur naturally and as an inherent part of the daily operations of the unit. This phase of the cycle should be continued throughout the fiscal year.
**Interpret, Analyze, & Evaluate Results**

As strategies are completed or at the end of the fiscal year, whichever comes first, results should be recorded for each outcome. A brief analysis of the results, including a description of any mitigating factors that may have impacted the achievement of various outcomes, should be included during this phase of the process. The analysis section should include any information that is needed to provide better context and/or a full understanding of the implementation process to help build a comprehensive action plan. This phase of the cycle should be completed by September 1.

**Develop Data-Driven Action Plans**

Following the analysis of all results, units must develop action plans for each outcome, regardless of whether or not all targets were met. Action items must be data-driven, meaning that they should be rooted in the findings generated during the previous phase of the planning cycle. Once action plans have been completed, units must submit their year-end Unit Assessment Report, complete with Executive Summary, to the VPPIE. This phase of the cycle should be completed by September 30.

Although presented as the “final” stage, it is important to remember that a circle has no beginning or end. Action items that are generated in this step of the planning process directly influence and feed into all parts of the next iteration of the Unit Strategic Plan.
Assessment Management Software

A key component that is critical to enhancing the efficacy of planning and assessment practices within the institution is the integration of an Assessment Management Software (AMS) within the process. The use of an AMS will allow for all Unit Strategic Plans Assessment Reports to be centralized within a single, secure, cloud-based server. In addition, the use of an AMS allows for enhanced collaboration among unit members by providing a single repository for all planning documents. This centralization is key to ensuring version control and document retention by allowing for all files related to a Unit Strategic Plan or Assessment Report to be stored in a way that is accessible and traceable. Moreover, an AMS provides unit leaders with the ability to build in timelines for completion of planning phases and includes the availability of automated reminders and progress reports.

WCJC has elected to use Weave as its AMS. Weave was selected following a rigorous review of multiple AMS due to its focus on customer support, accessibility of its user interface, and the multiple functions that it can provide the institution as a whole (namely in the areas of review, assessment, credentialing, and accreditation). Unit leadership, along with any others in their department whom they deem appropriate, will be trained on the use of Weave as part of the planning and assessment process. In addition, users may contact the Weave helpdesk directly, 24/7, through their live help feature present on the user’s home dashboard.
Campus Communication Plan

In an effort to develop a culture of planning and assessment within the institution, distinct initiatives will be put in place to promote involvement and buy-in from all campus constituents. These initiatives are focused on providing avenues through which strategic goals, planning initiatives, and assessment results can be continually communicated to the larger campus community (Wasserman & Durishin, 2014).

IE Web Presence

Information regarding institutional effectiveness, planning, and assessment for both the WCJC Strategic Plan and the unit-specific Strategic Plans will be shared with constituents via the WCJC Institutional Effectiveness webpage. Communications, information items, and data reports shared through this medium will be primarily geared toward external stakeholders, including prospective students and community members.

More detailed information and reports will be published on the Institutional Effectiveness intranet site. This site will be structured to allow internal constituents enhanced access to and awareness of planning and assessment efforts occurring across the institution. Through providing a shared space through which information can be readily shared and referenced, the Office of IE seeks to reduce information silos within and among units.

WCJC IE Newsletter and Data Days

During each month of both regular semesters, the VPPIE will distribute a monthly newsletter with key data highlights relevant to the campus community. In addition, the VPPIE will host a series of informational sessions, titled “WCJC Data Days”, beginning as a regular series during Convocation week and expanding, if necessary, to a monthly seminar. Each newsletter and/or seminar presented in a given month will cover the same topic/information related to a particular initiative presently underway at the college. Potential topics include:

- Year-end strategic plan results & KPI presentation
- Annual enrollment overview
- Student survey results and analysis
- 60x30TX status updates
- Success points report
- Best practice spotlight
- Program market demand analysis
- State reporting overview (THECB Almanac, CBM Reports, LBB Report)
## Appendix A – Unit Assessment Plan Template

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Metric 3.3.3: 
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