PRESIDENT'S CABINET RETREAT
FRIDAY, APRIL18, 2008
MINUTES

The retreat began at 9:26 am at Mission Trails. Introductions were made by all.

9:00-9:30   Ice Breaker: "Who are you, REALLY?" (Ken Gonzalez)

Ken Gonzalez explained that names of famous people will be taped onto everyone's back. Otto Lee was part of the demonstration and the name "Oprah Winfrey" was taped to his back. He asked questions of the group in an attempt to identify "who he is, really". After several questions, he guessed correctly. The group split into pairs and participated in the ice breaker.

Overview of Agenda (Rita Cepeda)

The Agenda was reviewed and no items were added.

9:35-9:40   Road Map (Rita Cepeda)

President Cepeda indicated there are three questions institutions need to ask themselves relative to the strategic planning process:
- Where are we going as a community college?
- Why are we headed in that direction?
- How will we arrive at the desired point in our journey? (How will we know when we have achieved our goal)

The work today will inform our strategic planning.

The first step is an Environmental Scan. The community college is the largest system of learning world-wide. What are the distinguishing characteristics about this system? What matters to us? The scan used a period of time from 2003-2005 to identify critical issues. Some of the issues identified were enrollment increases, shifting demographics, low public visibility, need for an educated populous, poor preparation (freshmen and re-entering adults), a 67% high school graduation rate, and State budgetary difficulties.

One factor is CSU and UC systems "closing their doors". We as a community college system are not able to do the same. We need to accept the thousands of students who are turned away from universities. Other factors include an escalating demand for post-secondary education and a continuous change in demographics. Effective and efficient use of resources is also an issue.

The District employed an environmental scanning firm under the leadership of Vice Chancellor Ingle. There are 12 critical findings. They include strengthening District infrastructure, strengthening collaborative partnerships with grades K-16, business and industry, as well as community organizations. Supporting professional leadership and development – succession planning – should be a focus.

9:40-10:00   Setting the Context (Rita Cepeda)

The following section provided an overview of state- and district-wide data and trends driving change and planning.

10:00-10:30   Elements Driving Current Planning Process (Yvonne Bergland)

Yvonne Bergland introduced six "imaginary friends": who, what, when, why, where and how. Then, continued by explaining how these "friends" relate to the Educational Master Plan and accreditation requirements.

Bergland asked <u>why</u> do we plan? In addition to providing direction for the College, planning is an accreditation requirement. Bergland asked, when it comes to planning, do we know what to do for accreditation? She cited the planning rubric from AACJC. The other two rubrics included are for program review and SLOs. For planning, where do we need to be in time for the site visit? How do we know we have reached our goal?

Bergland asked <u>how</u> are we going to be measured? There is a need for sustainable continuous quality improvement. The educational Master Plan should reflect our planning process.

Bergland asked, <u>what</u> is planning? What are the planning elements used at Mesa? We start with the Mission Statement (the Educational Master Plan). We need to know how we arrived at this plan. She referred to the chart on page 17, as well as the information on pages 6-14 of the Mesa College Educational Master Plan. There is a Mesa College Annual Integrated Planning Matrix on page 41 that illustrates the various planning activities, responsible entities, and timeline for completion of various activities. This document is in response to feedback from the Commission at our last site visit that indicated there is no connection between planning activities at Mesa.

Bergland asked <u>who</u> does the planning at Mesa; the stakeholders (students, faculty, staff, administrators, community members and the District. She suggested that it is our responsibility to determine that all stakeholders are included in the Educational Master Plan. A review of the tabs on the document revealed that Administrative Services and Associated Student Government are not included. Bergland suggested revisiting the document to determine if any other areas are missing. She added that community and business/industry input does not appear to be indicated in the document.

It was noted that this document is an Educational Master Plan, not a Strategic Plan. Otto Lee suggested that a lot of the community and business/industry input is through advisory committees and that information is not articulated into the Educational Master Plan.

Discussion followed. If Mesa were to develop a strategic plan, should we include concrete statements in the introduction about our service areas? Other ideas were noted: Strategic priority, emphasizing local business/industry, tie it in with global awareness (take advantage of our proximity to the Mexican border and form partnerships with Mexico), system-wide/ legislative and governance. Cepeda cited that SANDAG explains the economic region as "San Diego Baja California".

Bergland asked <u>when</u> do we plan? <u>Continuously</u>. She added do we have a timeline? How are we going to articulate this timeline? It must be a concrete timeline we can provide to the Commission. Our planning is cyclical and includes deadlines for completion of projects within the plan. There are annual reports due and we follow an accreditation timeline. Also, there are short- and long-term planning processes in place.

Bergland asked <u>how</u> do we know we're on the road or going in the right direction? Bill Craft indicated there appears to be dissidence between assistance for students who need a second chance (school system failed them – basic skills mission) and the desire for students to complete what they started rather than reinforce failure. We need to provide a different type of support for students in addition to remediation. Students seem to pass one part of a requirement and then fail another part.

Bergland added there is a need for continuous evaluation to find out if we are meeting our planning goals. She referred the group to page 115 of the Educational Master Plan that includes the research planning agenda. Is there an evaluation piece? It was suggested to develop an enrollment scorecard and incorporate it into a strategic plan that would allow us to

evaluate our processes annually to determine if our goal has been met. A major challenge of community colleges is there are two sides of what is expected of us. We enroll individuals who have advanced degrees but need our help to get into the workforce. We also enroll individuals who have educational levels of eighth grade or below and need our help. A task of the Basic Skills Initiative (BSI) is to establish the curriculum continuum to help students. Also, just because we have a set of expectations for the Associate degree or competency, etc. do we have a smooth bridge in place for preparing transfer students and/or students who will be entering the workforce? The answer to that question should define program review, curriculum, and continuums. It is also the critical piece for the BSI.

Craft cited a newspaper article that indicated out of 100 students enrolled in community colleges, 10 students graduate. The article continued by indicating the low graduation rate should be a reason for cutting funding to community colleges. Susan Mun added that we have baseline data from CCSSE as well as data on retention. The part that is missing is connecting this data to our planning; connecting our goals to this data and developing "smart goals".

Discussion followed. The application for admission includes a question regarding student goals. We may not know the student achieved that goal. We should listen to what students want. An example was given about a mechanic who knows how to fix a Honda but you bring in a Ford. We have expertise as to how to teach the student but need to know the student; how to provide the full array of services they need to achieve their goal. An example was given about a student who wants "X" to lead them to job "Y" but did the student know that this job does not exist in San Diego? Lina Heil suggested checkpoints be implemented that may allow us to go back and change the "what" (a mechanism to revise the goals that are in place). Baker noted a presentation made at CCLDI. Her group addressed how we can have a more robust intake tool to indicate if something has changed. She suggested this needs to be added to Mesa's planning. If we really know what students want as things change, how do we measure our success to get them there? Mun added sometimes student plans get derailed and we should find out why. Did they intentionally change their plans or could the change have been prevented. We do not have much control over changing plans but every student's goal is to learn and succeed and we are meeting our goals in helping them achieve that.

Cepeda noted we have already identified that the standards for institutional effectiveness do not appropriately measure what we do. This is a world of accountability. She summarized the discussion by stating that perhaps we have to identify two or three critical markers that identify Mesa. There are minimal units of measure such as income – for every three units you earn, your salary increases (data obtained from the labor market). We need to identify some core things that indicate we are on the right track. We need to be able to support requirements to be able to say "we know we are on the right track because…."

Nina Lopez provided a student perspective concerning this "disconnect". She reported that feedback from evening students indicates a need for evening tutoring and Language Lab services. The LRC is not always the appropriate place to go for assistance. Hossna Sadat cited a quote, that "assessment is the zipper that connects teaching and learning"; not only teaching but support services for students. Otto Lee added that students work and have families. He referred to accreditation and SLOs that are also holistic. Our motivation is for Mesa students to achieve those SLOs, and then have a plan for moving ahead and building on the gaps. Jodi Corliss added that students and faculty demographics are changing. The perception of community colleges is changing and becoming more positive. Cepeda added that individuals who participate in passing laws for community colleges have only been in office for 6 months. Weiss added that we should remain focused on such topics as the BSI and allow it to grow, for example, rather than moving on to the next thing.

Bergland noted that we are all engaged in a big project for accreditation. She called it "Jill and Yvonne Productions". She referred to another document that accompanies the rubric containing a list of standards that are part of planning. These questions will be answered through the accreditation document. Planning is evident throughout the self-study document. When you look at planning, it is a holistic approach. She noted this document will assist with accreditation.

10:30-10:40   Break

10:40-11:10   Other Models of Planning (Ken Gonzalez and Barbara Kavalier) (See Appendix A)

Barbara Kavalier reviewed strategic planning. She noted there is a difference between operational planning (focused on issues of control and efficiency; day-to-day issues) and strategic planning (looking ahead and thinking about where we want to be in the future). Sometimes, operational and strategic come together. But change, innovation and transformation are what we are looking for. We need to ask some core questions (please see page 2 of the PowerPoint "Strategic Planning"). She asked where do we want to be? We need to be honest about our limitations. We also need to prioritize and build over time. We need to identify stumbling blocks by collecting data and making projections. How do we know we have arrived? We need to evaluate and assess what we are doing.

Strategic planning is stepping back and surveying our landscape. This begins with a shared vision - common beliefs, values, and a mission. Identify our assumptions about future directions. Broadly define our goals. We need objectives that identify our activities to help us identify our goals.

Short-term planning focuses on a one-year timeline and provides flexibility and adaptability. We may want to consider that a long-term goal is 3-5 years. She shared a pyramid model to define strategic planning. At the foundation we have a mission/vision. On the left, is strategic planning – how we are going to get there. On the right is institutional effectiveness (SLOs, program review, etc.) that shows how well we are doing. "Culture" surrounds the model. Everything around this model has to be balanced and mindful of culture and politics.

Ken Gonzalez introduced himself. He is a professor at the University of San Diego and is currently on sabbatical. During the last five years, he has been helping colleges prepare for accreditation. He has also helped colleges develop a meaningful process that produces better outcomes for student success. He also worked with math faculty at Mesa to increase course completion rates, specifically in Math 95.

He began with planning, in the context of accreditation (WASC and New Expectations). He asked, do you have the capacity to serve students and how well are you facilitating learning? He referred to page 3 of PowerPoint. First, shift from the concept of "episodic volcanic activity" that takes place in preparation and during the visit, to learning-centered continuous improvement. Second, how do you know if you are effective or not – shift from long "affirm and assert" reports to evidence-driven processes. Third, shift from "regulatory" to "capacity-building". Fourth, ask yourselves if you are not only collecting data but if you are using it to improve instruction, student services and operations? The final step is that these discussions will enhance teaching and learning in the classroom.

Gonzalez referred to "Concrete examples of WASC and New Expectations". In this illustration, the left side is the capacity (Educational Master Plan, Program Review Plans, Structures/ Committees, Organizational Processes. The right side is "Effectiveness", to what extend are these plans helping us be more effective, and if they are not, then how can we tweak the plan to provide better results? Also consider if our plan is based on data.

Gonzalez referred to a chart on page 4 of the PowerPoint. This chart lists indicators. These indicators are 1) identification of performance indicators, 2) assessment of performance indicators, 3) identification of underlying factors or causes, 4) revising or creating new interventions or policies, 5) assessing impact of the changes (formative and summative). The process is a full-circle approach.

He referred to a second chart with common performance indicators. First, you take into account male/female, certain groups (such as evening/day students), then you create interventions for these students. The data could be disaggregated several ways. He referred to Mesa's Educational Master Plan and asked what are we trying to have impact on? He started with three broad priorities as examples of what can be done. He suggested using the information in the cells under "intervention priorities" and then referred to the questions listed below the chart (see page 5 of the PowerPoint for this example). Then, we take action.

He presented a chart, this time for SLOs, illustrating the full circle approach. Please see page 6 of the PowerPoint.

Gonzalez pointed out that when working with various colleges, he noted there are activities taking place locally that make a difference. For example, he found that some math students were experiencing difficulty accepting the textbook because it provided a lot of examples of what not to do and they wanted to know said what not to do while they wanted to know the opposite.

Terrie Teegarden suggested the wording be changed from "best practices" to "effective practices". This would mean that there is data to support what "works" with certain groups. Gonzalez added that it may be best "processes" that can be tweaked to fit our climate. Discussion followed as to what already works and what does not work because this information may not be known until after the student leaves Mesa. Craft noted that he previously taught where 23 students at the beginning and 19 at the end. He suggested that more students should communicate with their teachers before dropping the class. It appears that the student culture is one where you "give it a shot" and if you like the class then you stay, if not, then you drop out. He added that it is difficult to learn from the data because if you are working with data from those students who stayed then most likely you did a great job. If you are working with data from those students who dropped, then most likely you did not do so well.

Gonzalez asked how do you get good data? He has used focus groups with students to determine what is going on the first three weeks of school. He indicated the goal is to understand those students who were still enrolled in the class at the fourth week and what they did to overcome any obstacles. It was found that these students encountered various barriers but the most important thing he learned was how incredibly vulnerable those students were and that they appeared to be "hanging on by a thread". He suggested that these students are provided with assistance to help them make it to week five, etc.

Discussion continued concerning the culture issue. Cepeda referred to comments made by Craft. She indicated that maybe we do not know the culture that prevents students from taking offers to connect with their teacher or that they do not like the textbook. We need to find out the attributions that make us all successful. We should find out if the student dropped out because he or she did not care or if it was because of another issue. This is an issue to be discussed through focus groups, etc.

Cepeda summarized the discussion by stating that Mesa has a good tool in the Educational Master Plan. We have learned that the Educational Master Plan is not a strategic planning document but it is a document that comes closest to aligning our various planning processes.

11:10-11:30   Small Group – Activity #1 (Yvonne Bergland)

Bergland split the group into four groups to work together to identify strengths and weaknesses to our current planning process and report out.

11:30-12:30   Lunch   (continue with group activity)

12:30-1:10   Report Out (Yvonne Bergland)

Report out Group #4: Jonathan Fohrman reported that the strengths and weaknesses focus on the process.

Strengths:
- Flexible/open
- Planning calendar
- Pulls together a variety of plans and processes
- Centrality of program review

Weaknesses:
- Absent/limited student voice
- Insufficient incorporation of community input
- Integration of planning deadlines with and around work cycle
- School goal-setting activities not linked to Educational Master Plan/overarching plans.
- Lack of measurable indicators
- Few longitudinal studies
- Not widely distributed/marketed to campus community

Comments from other group members: Weiss indicated that the Educational Master Plan is not widely distributed because of printing expense. He suggested posting it online or developing an executive digest.

Report out Group #3:   Do we want the instructional plan to be the strategic plan? They suggested this question be discussed and decided as a group.
Strengths:
- Spending time planning
- Instructional component
- Desire for students to succeed
- Collective effort

Weaknesses:
- Changing External or not enough time
- Metric – how do we measure
- Missing representation: marketing/budget/classified
- Lack of understanding of roles (silos)
- Student role – community involvement

Report out Group #2: Discussion followed as to using signage or flags to advertise Mesa and its events to the community. This would be done through the City.

Strengths:
- Props S and N
- Cultural Diversity
- High caliber faculty
- Strong participatory governance structure with all constituents represented

- Transparent budget
- Program review process/methodology
- Access to largest number of students
- Mesa as a "College of Choice"
- Defined institutional priorities
- Creative use of existing resources

Weaknesses:
- No strategic plan
- Limited student voice and failure to integrate what they do say
- Increased broad based involvement of all faculty
- Lack of effective tools to integrate community voice
- Lack of college visibility signage in the immediate community
- "Silo-izing" good, small communities that do not interact
- Lack of shared vision (not everyone on the same page)
- Not fully integrated
- Limited resources
- Restricted space/lack of facilities
- Master planning that addresses this problem
- Mismatch – infrastructure and institutional priorities
- Emergency planning

Report out Group #1:

Strengths:
- Issues focused on students integrated throughout the document
- Master plan collaborating, "from the ground, up" process
- Desire for everyone to take action
- Organized/user friendly

Weaknesses:
- Needs more of a student focus/input
- Lack of weekend/evening services
- Need more data on non-traditional students
- Better integration with specific departments (Research, IT).

A summary of the reports out was given: Reach out to students; silo-ized; building around units but do not know about events going on around the campus; we do not all know what the priorities are – and how are they integrated; disconnect between planning and operations; notion of why our community does not adopt us and what must we do to gain their trust/pride? It is felt there is a vaccuum – voice – administrative and business component of our campus. What is strategic master planning? If we answer this question, then we can answer the next question if we should have it? It was agreed that we should have a strategic master plan with reports that refer to it.

1:10-1:40   Small Group – Activity #2 (Barbara Kavalier)

Kavalier indicated that this next activity is "where we should be". We identified two questions we would like to ask:

1. What are the 3-5 things (processes) we should do to create the perfect strategic plan?
2. What are the five most critical elements that we should have in our Strategic Plan?

The answer to #1 is, for example, to evaluate our current planning process and that we have measurable priorities for the college (goals, for example). What is it we want to impact….to identify those goals?

1:40-2:00   Report Out (Barbara Kavalier)

Group #1 Report out:
Process to create a perfect strategic plan:
1. continue to ensure all stakeholders are part of the process (students, faculty, staff, community)
2. make sure there is a clear definition of what strategic plan is and the desired outcome
3. goals should be limited, prioritized, achievable, linked to budget (within reason)
4. timely data should be used
5. identify necessary components to be used (data, timelines, resources)

Group #2 Report out:
Process to create a perfect strategic plan:
1. create a new (streamlined and cooperative) strategic plan document
2. conduct a Strength Weaknesses Opportunities Threats (SWOT)/Trend analysis – align current plans with data findings
3. How do we integrate and evaluate our strategic plan? How do we make it easy and familiar? Use of dashboard indicators
4. How do we bring in the rest of the college (business communities, students, human resources, facilities)? Focus groups, town hall meetings, incentives (such as food, earmark funds for the school that brought the greatest percentage of faculty to the meeting).

Group 3 Report out:
Five key elements:
1. all plans support mission/vision/goals
2. reflects true engagement – support from all constituencies
3. reflect culture of evidence – in which data research informed decision-making
4. smart goals – specific, measurable, achievable, realistic, time-bound
5. clear, concise and reviewed regularly

2:00-2:10   Break

2:10-2:30   Next Steps (Rita Cepeda)

Cepeda synthesized the ideas of the day. She noted that:
- Mesa will develop a separate strategic master plan beginning with a clear definition of it
- Environmental scanning process that is inclusive with external and internal constituencies - make good use of the data we have, do a scan of the documents that exist, this plan will begin and be guided by vision, mission, goals
- We will move to strategic priorities and smart goals
- Strategic master plan will include process for making it known, process for effective dissemination, active integration, periodic evaluation; that all other planning processes be aligned, these resources include #4 on Group 2 report out (Human Resources, etc.)

Cepeda suggested setting aside time during President's Cabinet for follow up on retreat discussion and development of the strategic planning document. These discussions may include more individuals rather than just members of the President's Cabinet.

<u>Additional Feedback:</u>
- Weiss suggested one meeting focus on incentives – how do we get more involvement?
- Jonathan Fohrman noted the extent to which we integrate our plans with District plans effect what we do. Cepeda indicated the need for a "meta-analysis".
- Bergland asked if this new document would be a companion/replacement document to the Educational Master Plan? Cepeda noted that it would be a guiding document. It would be linked to the Educational Master Plan.
- Heil noted that we should consider the "What's In It For Me?" attitude. Not just consider incentives but if we go out to the community, what's in it for them? Ask them what they want and accept their feedback.
- Mun suggested conducting a survey of our community that would inform our strategic plan. Cepeda added that this survey could be part of the scan but has not been determined yet.
- Joi Blake noted that when her previous college asked for feedback from the community, they provided dinner, presented similar information (the SWOT analysis) and then the community provided their feedback.
- Jodi Corliss asked how often does the scan get done at the District level? Cepeda indicated that was the first time a scan has been done and there may not be a cycle set up yet for it to be done periodically.
- Lee noted it might be helpful to keep in perspective that strategic planning is unique and that traditional models may not work.
- Kavalier indicated Mesa would be more successful if instead of just creating a plan, have critical conversations about where we want to be in five years and the goals we want to move forward. Then, the plan becomes a documentation of this discussion.

2:30-3:00   Q&A and Evaluation (All)

Cepeda thanked the group and asked them to complete the evaluation form regarding the session.