College of the Sequoias

Follow-Up Report 2014

Submitted by:

Sequoias Community College District
915 South Mooney Boulevard
Visalia, CA 93277

Submitted to:

The Accrediting Commission for Community and Junior Colleges,
Western Association of Schools and Colleges

October 10, 2014
Follow-Up Report - Chief Executive Officer Certification Page

To: Accrediting Commission for Community and Junior Colleges, Western Association of Schools and Colleges

From: Stan A. Carrizosa, Superintendent/President
College of the Sequoias
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I certify that there was broad participation by the campus community, and I believe this Follow-Up Report accurately reflects the nature and substance of this institution.

Signatures:

Stan A. Carrizosa  Superintendent/President  10/7/14

Lori Cardoza  President, Board of Trustees  10/7/14

Dorothea Trimble, Ph.D.  President, Academic Senate  10/7/14

Abbi Gregory  President, Student Senate  10/7/14

Jennifer Vega La Serna, Ph.D.  Accreditation Liaison Officer  10/7/14
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Statement of Report Preparation

College of the Sequoias

Community College District
Statement of Report Preparation

Upon receipt of the Action Letter issued by the Accrediting Commission for Community and Junior Colleges (ACCJC) in February 2014, the Sequoias Community College District began a diligent process to respond to the recommendations outlined by the Commission after its review of the District’s Show Cause Report and the report of the evaluation team that visited on November 13 and 14, 2013.

The 2013-14 academic year was an important timeframe marked by the intense period of response to the 2013 Show Cause order. During this time, the entire District was engaged in a thoughtful and collaborative process to re-establish and create effective and efficient structures. Once in place, these structures functioned to promote high quality institutional systems and ensure ongoing assessment and improvement necessary to meet or exceed all ACCJC Eligibility Requirements and Standards.

Over the past year, the District has fully implemented these systems and structures. It is the documentation and assessment of this implementation that serves as the foundation of the 2014 COS Follow-Up Report. In doing so, this report serves as a record of the District’s use of key structures including the District Governance Senate, Academic Senate, Student Senate, Institutional Program Review, and respective committees and councils to conduct District operations, monitor District progress, communicate District effectiveness, and to assess and improve District processes.

In an effort to support full implementation of all new systems, processes, and protocols the following actions have been taken by the District over the past year:

1. Senior Management Council appointed an Implementation Task Force. This group of faculty and staff members has been charged with supporting the full implementation of the COS 2.0 Manuals, which set forth the processes and procedures for Governance and Decision-making, Integrated Planning, and Resource Allocation. These manuals define and clarify the roles and responsibilities of all stakeholders in the governance and decision-making process. The work of the Implementation Task Force has provided guidance, interpretation of new information, consistency of implementation, and proposed revisions to processes and procedures where feedback and assessment results were required.

2. Senior Management Council has taken a stronger role to support the District Governance Senate and collaborate with the Academic Senate so that they may effectively fulfill their roles and responsibilities in District governance. The Superintendent/President has maintained a consistent and ongoing agenda of discussion, guidance, and review in an effort to monitor all processes necessary to institutionalize these new governance processes in the District. The District Governance Senate and the Academic Senate along with their respective governance committees have successfully implemented their roles in the governance structures consistent with their authority and responsibilities under COS 2.0.
3. The COS Board of Trustees has been consistently engaged in all aspects of COS 2.0 through the regular review of information, discussion, and monitoring of governance, planning, and resource allocation processes as demonstrated through reports and action items on the monthly public meeting agendas.

4. The Vice President of Academic Services is the Accreditation Liaison Officer (ALO) and has worked in conjunction with the president of Academic Senate and Institutional Planning and Effectiveness Committee (IPEC) to guide, steer, and help direct the preparation of the 2014 COS Follow-Up Report.

To document and assess the work completed by the District over the past year, a work group of COS administrators and faculty served as the District’s “Editing Team.” The Editing Team was formed in 2013 to support and assist in the preparation of the Show Cause Report and has continued its work to provide continuity and efficiency in preparation of the 2014 COS Follow-Up Report.

Under the leadership of the ALO, Senates, and IPEC, the Editing Team has facilitated gathering the evidence produced organically through the COS 2.0 systems. The Editing Team has worked closely with the Office of Research, Planning and Institutional Effectiveness to request and compile all the data and evidence necessary and relevant to District operations to effectively illustrate compliance with all ACCJC Standards and Recommendations identified in the Commission’s February 2014 Action Letter.

Input from all District constituents, including faculty, administrators, students, and staff from all three campuses (Visalia, Hanford, Tulare), was used to prepare the COS 2014 Follow-Up Report. This diverse participation includes, but is not limited to, the following:

1. Over the last year the District has scheduled District-wide forums to present drafts of the report in progress. Each forum has been live-streamed to all three campuses and input/feedback has been requested from every session.

2. The COS Board of Trustees engaged in a thorough review of the draft of the COS 2014 Follow-Up Report as a key component of its annual two-day Board Retreat. Board members receive ongoing updates on the District’s progress on meeting all ACCJC Standards and satisfying the Recommendations.

3. District Governance Senate, Academic Senate, Student Senate, and respective committees have also reviewed draft sections of the report as a regular item on their respective meeting agendas with opportunities for feedback/input.

4. A comprehensive review of the Accreditation response process and timeline along with a detailed outline of the 2014 COS Follow-Up Report was presented by the Superintendent/President and a team of faculty at the fall 2014 Convocation to all District staff.

5. The District has continued to engage the entire college community in ongoing discussions, input, and updates on the COS 2014 Follow-Up Report through the quarterly meetings of the COS Advisory Committee (CAC). This advisory group was
originally formed during the 2013 Show Cause response period and played an integral role in reviewing and monitoring District progress at that time. This committee provides an important venue for community input, questions, and involvement.

The past year has provided the District with the time necessary to complete full, annual cycles of the COS 2.0 systems. We are excited to present the 2014 COS Follow-Up Report, which shows even further evidence of the substantive cultural change that has taken place in our institution. We have toiled tirelessly and deliberately over the past two years to create structures and systems for the District that transcend any president or faculty leader. We are confident that these structures and processes allow the District to meet all Accreditation requirements and Standards. Accreditation no longer represents a periodic event, but instead embodies an ongoing approach to institutional improvement.

College of the Sequoias is a successful institution with a rich and proud history of serving our region of Tulare and Kings Counties. As we look to the next 89 years of service, this report serves as a reflection of who we have become. Over the past twelve months, we have experienced a convergence of the right combination of forces that have broken the institutional inertia and re-created new norms. We feel privileged to be part of such a rare and important opportunity to provide institutional leadership and public service.

College of the Sequoias values the continued guidance of the Commission and whole-heartedly supports professional self-regulation as the most effective means of assuring the integrity, effectiveness, and quality of our District. Successful Accreditation is our quality assurance to our community. We are confident and excited to be restored to full Accreditation in 2015.
Standards

I.B.3, III.D.1.a, III.D.1.d, III.D.4, IV.B.2.b
**Standard I.B.3.** The institution assesses progress toward achieving its stated goals and makes decisions regarding the improvement of institutional effectiveness in an ongoing and systematic cycle of evaluation, integrated planning, resource allocation, implementation, and re-evaluation. Evaluation is based on analysis of both quantitative and qualitative data.

**DESCRIPTIVE SUMMARY**

The College of the Sequoias Community College District has developed an ongoing systematic cycle of institutional planning that includes data-driven evaluation, integrated planning, resource allocation, implementation, and re-evaluation. These processes are characterized opportunities for District-wide participation. The District Governance Senate, Academic Senate, and the Senior Management Council supervise the ongoing planning processes, including development and assessment of learning and service area outcomes, program reviews, and budgeting processes that lead to resource allocations.

The District has developed three manuals that guide the processes of integrated planning, resource allocation, and governance. These manuals clearly outline the processes the District follows, including timelines, the groups or individuals responsible for implementing those processes, and the evaluation of those processes on a regular basis. A summary of the contents of each manual is outlined below.

**Integrated Planning Manual**

- Describes the process for Plan Implementation (Actions and District Objectives associated with Strategic Plans);
- Describes the processes for Outcome Assessments (including evaluations of Actions taken to achieve Strategic Plans and their outcomes);
- Describes the processes, timelines, and responsible groups for the following:
  - review and possible revision of the Mission of the District;
  - development of the Master Plan;
  - development of the Strategic Plan;
  - completing Institutional Program Review;
  - development of the Base Budget;
  - production of the Annual Report of the Master Plan (currently Strategic Plan);
  - assessment of planning and decision-making processes, including an annual assessment and a comprehensive assessment conducted every three years.

**Resource Allocation Manual**

- Defines links between resource allocation and planning;
- Describes processes, timelines, and responsible groups for the following:
  - base budget development;
  - Above-base resource allocation;
  - assessing the effectiveness of Above-base resource allocations;
Governance and Decision-making Manual

- Defines all types of governance groups;
- Defines all existing governance senates and the committees that report to them. This includes the membership of each group, the charges or purposes (functions) of each group, and their current meeting schedules.
- Identifies a timeline for when the District Governance Senate will conduct an annual review and update of the Governance and Decision-making Manual to reflect minor changes agreed to by the relevant groups. It also states that the District Governance Senate will conduct a more formal assessment of the governance groups and processes as a part of the District’s assessment of the planning processes every three years.

A graphic describing the College of the Sequoias Model of Integrated Planning is shown below. This graphic describes how various planning processes are linked to resource allocation. In addition, it demonstrates the cyclical nature of current planning at College of the Sequoias, including plan implementation, outcome assessments, and re-evaluation. Data plays a central role in the planning and resource allocation processes.
There is substantial use of quantitative and qualitative data in the planning processes described above.

The newly revised Institutional Program Review includes the analysis of data specific to the unit. Academic units review and analyze data on enrollments (FTES) and success rates for the previous three-year period and are able to compare their data to District-wide averages. In addition to standardized data sets, academic units may request additional data from the Office of Research, Planning and Institutional Effectiveness, and additional data were requested from nearly half of the divisions. Student Services and Administrative Services units also utilize data during their program reviews. In conjunction with the Office of Research, Planning and Institutional Effectiveness, these units determine what data they require to complete the program review process. Within program review, moreover, all units holistically evaluate their achievement and assessment of outcomes at all relevant levels (i.e. course, service area, program, and institutional) and use these evaluations to identify potential ways to support and improve achievement within their programs. [E85]

Data is also central to the development of the Annual Report on the Strategic Plan – to be retitled Annual Report on the Master Plan beginning in 2015. (See p. 33 in the Integrated Planning Manual) [E39] Within this report, parties responsible for implementing the existing eight District Objectives provide qualitative and quantitative data and indicate any progress on the completion of Actions that support the realization of District Objectives. The Institutional Planning and Effectiveness Committee is responsible for the development of this annual report. This report allows the District to accomplish the following four tasks:

- Consolidate the reports of progress on individual units’ Actions;
- Analyze the progress in terms of the effectiveness of District Objectives in moving the District toward achievement of the District Goals;
- Edit or augment Actions for the coming year as needed based on the outcomes of the current year’s work;
- Identify improvements to District policies and procedures that resulted from these Actions.

SELF-EVALUATION

The College of the Sequoias Community College District meets this standard.

The District has in place three manuals that clearly describe the processes, timelines and responsible parties/groups that conduct institutional planning, resource allocation and decision-making. Since their adoption, the District has followed these processes and timelines.

The Show Cause Team Report (November 2013) acknowledged that:

“While COS has done a great deal of work through the creation of the 2013 Integrated Planning Manual and through creation and implementation of procedures to support its new processes, in order to fully meet the Standard, COS will need to follow its new model to ensure integration, resource allocation, implementation, and re-evaluation, based on analyses of both quantitative and qualitative data” (p.9). [E119]
Since November 2013, the District has accomplished the following during implementation of the new processes and procedures which include the:

- new annual program review processes (The first round of the newly revised Institutional Program Reviews was completed fall 2014.);
- process for development of the 2015-2025 Master Plan;
- new processes for the development of the base budget;
- new processes for the development of Above-base resource allocations;
- systematic review of the Above-base allocation process (including the analysis and evaluation of the effectiveness of those allocations);
- annual evaluation of the governance groups;
- formation of a Mission Statement Task Force.

The District has made improvements in its institutional practices that are directly attributable to the implementation and evaluation of the processes described above. These include:

- Senates:
  1. The District Governance Senate revised the Governance and Decision-Making, Integrated Planning and Resource Allocation manuals. [E61]
  2. The District Governance and Academic Senates revised the process for the establishment and alteration of Board Policies and Administrative Procedures. [E5] [E22] [E59]
  3. The Academic Senate instituted training on Robert’s Rules of Order and the 10 + 1 items under Academic Senate purview. [E11]
  4. The Academic Senate developed a new constitution and by-laws. [E11] [E115]

- Committees:
  1. The Budget Committee revised the Above-base resource allocation rubric and the Above-base Resource Allocation Process. [E29] [E30] [E31] [E32] [E37]
  2. The Budget Committee instituted regular “best-practices” training on community college accounting conventions and standards. [E33]
  3. The Institutional Planning and Effectiveness Committee revised the format for reporting of Actions for the Annual Report on the Strategic Plan. [E74] [E75]
  4. The Institutional Planning and Effectiveness Committee reformatted the meeting structure to encourage in-depth data analysis, editing, and creation of planning documents and to minimize informational reporting. [E73] [E74] [E75] [E76]
  5. The Institutional Program Review Committee established regular joint meetings with the Budget Committee for purposes of alignment of processes. [E80]
  6. The Institutional Program Review Committee developed an assessment rubric to evaluate the quality of responses within the Program Review templates. [E37] [E79]
• Councils:

1. The Instructional Council revised the policies and procedures for selecting and ranking new faculty hires. [E91]
2. The Instructional Council reformatted its meeting structure to include an open forum for the discussion of emerging issues. [E90]
3. Deans’ Council changed its meeting structure to encourage greater depth of discussion and to encourage deans to submit agenda items. [E51] [E90]

During the implementation and evaluation of its new processes and procedures, the District has relied on the analyses of both quantitative and qualitative data. The systematic collection and analysis of data have been embedded within the following processes:

• Institutional Program Reviews;
• Annual Report on the Strategic Plan;
• Master Plan development;
• Annual Evaluation of Governance groups;
• Above-base resources allocation;
• Base budget development;
• Mission revision;
• Student equity plan development;
• Outcomes assessment.

The District is committed to following its new processes as outlined in the three manuals. The District is committed to the use of data in implementing these new processes. The District has developed the necessary processes, procedures, and infrastructure to allow it to continue to meet this standard.

**ACTIONABLE IMPROVEMENT PLANS**

None
Standard III.D.1.a  Financial planning is integrated with and supports all institutional planning.

DESCRIPTIVE SUMMARY

The College of the Sequoias Community College District has established an integrated planning process in which the Mission and District Goals are the foundation for financial planning and resource allocation. The integrated planning model, along with the processes and timeline for each component in the model, are documented in the Integrated Planning Manual. (Standards I.B.2., I.B.3., I.B.6.)

The District’s integrated planning model explains how the components of institutional planning link to one another in a cycle characterized by these steps: evaluation; development of District Goals, Objectives, and Actions; resource allocation; plan implementation; and re-evaluation. It is through the annual sequence of these planning practices that the District assesses institutional effectiveness and uses those assessments to continually improve the District’s services to students. (Standards I.B.1., I.B.2., I.B.3.)

Financial planning occurs at several different levels of the District, beginning with planning in individual units, followed by planning in each of the three service areas (academic services, student services, and administrative services), and finally for the District as a whole. The Mission is the foundation of all planning processes because it describes the intended student population and the services that the college provides to the community. The Mission is therefore fundamental to the assessment of the District’s institutional effectiveness. (Standards I.A., I.B.2.)

In the District’s cycle of integrated planning, District-wide planning produces two key documents: the Master Plan and the Strategic Plan. District Goals are developed through the process of building the long-term Master Plan. This process includes an analysis of the District’s effectiveness in meeting its Mission. Data are used to identify challenges and opportunities. District Goals are developed to describe how the District intends to address the identified current and anticipated challenges. In the Strategic Plan, these District Goals are the foundation for more specific and measurable District Objectives. These District Objectives are then linked in Institutional Program Reviews to unit Actions and resource allocation requests. (Standard I.B.2., I.B.3., III.D.1.a., III.D.4.)

In the District’s model of integrated planning, District Goals and District Objectives are central to resource allocation. In developing the 2014-2015 budget, the budget development process began with establishing budget assumptions (e.g. revenues and expenses) to guide the allocation of resources. Information from a variety of sources was considered in the development of the budget assumptions, including:

- District Goals (Master Plan) and District Objectives (Strategic Plan);
- Priorities identified through the Institutional Program Reviews;
- Mandates from external agencies;
- Status of long-term and ongoing obligations;
- Projected state funding based on projected Full time Equivalent Students (FTES);
- Local funding.

The District’s budget development process is described in the *Integrated Planning and Resource Allocation* manuals and is summarized below: [E39] [E40]

January:
- The Board of Trustees and District Governance Senate review the Governor’s January budget and establish Board of Trustees priorities aligned with the District Objectives in the Strategic Plan for the coming fiscal year.
- Fiscal administrators draft budget assumptions to reflect District Objectives, external realities (such as the level of state apportionment), and forward the budget assumptions to the Budget Committee.

February-May:
- On a monthly cycle, the Budget Committee reviews and revises the budget assumptions as warranted based on new information and updates the District Governance Senate on the status of the budget assumptions for the coming fiscal year.
- The Vice President of Administrative Services schedules annual meetings at each campus during the spring budget development period to communicate the District’s anticipated budget for the ensuing year.
- Fiscal Services creates a tentative budget and provides area managers with tentative allocations for the coming fiscal year.

June:
- The Vice President of Administrative Services presents the tentative budget to the Board of Trustees for approval. The presentation includes links between the resource allocations and the District Goals and Objectives.

July-August:
- The Superintendent/President, Vice President of Administrative Services, and Director of Budget and Categorical Accounting adjust the proposed budget assumptions and the tentative budget as needed based on changes in the state budget.
- Fiscal administrators analyze year-end results and incorporate these results into local planning processes.

September:
- The Superintendent/President presents the final budget to the Board of Trustees and includes a description of the relationship between resource allocations and the District Goals.
- The Board of Trustees approves the final budget.
In addition, the *Resource Allocation Manual* describes the District’s Above-base Resource Allocation Process. This process, which has recently been evaluated and revised, is outlined below:

**Step 1:** Units may request Above-base funds through Institutional Program Review. Alternatively, units designated as a responsible party for a District Objective may request resources if funding is needed for the achievement of that District Objective.

**Step 2:** Divisions and/or deans review funding requests, identify funds if possible, prioritize funding requests, and forward priorities to the service area manager.

**Step 3:** Above-base resource requests are prioritized within the service area. Those prioritized lists are sent to the Budget Committee for District-wide prioritization (Instructional Council, Student Services Council, Administrative Services, and President’s Office).

**Step 4:** The Budget Committee requests technical and feasibility assessments of requests from the Technology Committee and the Facilities/Safety Council.

**Step 5:** The Budget Committee uses a rubric to prioritize the Above-base resource requests and forwards the prioritized lists to the District Governance Senate.

**Step 6:** The District Governance Senate reviews the prioritized lists and makes recommendations to the Superintendent/President.

**Step 7:** The Superintendent/President reviews the prioritized lists, approves the Above-base resource allocations, and presents the final report to the Board of Trustees.

**Self-Evaluation**

The College of the Sequoias Community College District meets this Standard. As described above, the District’s financial planning processes are integrated with and support all institutional planning.

The Show Cause Team report found that “*Since the newly revised integrated planning model became effective in fall 2013, the first opportunity to develop budget assumptions under this new model will begin with the development of the 2014-15 budget, which will take place during spring 2014*” (p.24). [E119]

Since November 2013, the District has completed the cycle for financial planning including budget development and resource allocation and has assessed and evaluated those processes. The District has completed the following regarding the budget development process:

- The Board of Trustees established priorities aligned with the Strategic Plan. [E24]
- Fiscal administrators drafted budget assumptions. [E3]
- The Budget Committee reviewed and revised budget assumptions and updated the District Governance Senate regarding these revisions. [E32] [E33] [E59]
• The Vice President of Administrative Services presented budget assumptions at all three campuses and gathered feedback. [E18]
• Fiscal Services built a tentative budget and provided area managers with tentative allocations for the coming fiscal year. [E14]
• The Vice President of Administrative Services presented the tentative budget to the Board of Trustees (including links between resource allocations and District Goals and Objectives). [E22]
• The Vice President of Administrative Services presented the final budget to the Board of Trustees which includes the relationship between resource allocations and the District Goals). [E23]

The District has also completed the following with regard to the Above-base Resource Allocation Process:

• Requests for funding were made through Institutional Program Review or the Annual Report on the Strategic Plan. [E19] [E86]
• Divisions and/or deans reviewed funding requests, identified alternative sources of funding, prioritized any unfunded requests, and forwarded these prioritized lists to the appropriate service area manager. [E98]
• Service areas (Instructional Council, Student Services Council, and Administrative Services) created an overall prioritization of the funding requests received from their respective units and forwarded this to the Budget Committee. [E13] [E93] [E97] [E107]
• The Budget Committee requested feasibility studies from the Technology Committee and Facilities/Safety Council as warranted. [E35] [E68] [E111]
• The Budget Committee utilized a rubric to create a District-wide prioritization of Above-base resource requests. [E27] [E37]
• The District Governance Senate reviewed the District-wide prioritized lists and made a recommendation to the Superintendent/President. [E54]
• The Superintendent/President approved a final prioritized list and reported to the Board of Trustees. [E21]

The District has completed a financial planning cycle that included the development of budget assumptions, the District budget, and Above-base resource allocations. These processes ensure that financial planning is integrated with and supports all institutional planning. The cycle will reoccur on a yearly basis as described in the Integrated Planning Manual and the Resource Allocation Manual.

**ACTIONABLE IMPROVEMENT PLANS**

None.
Standard III.D.1.d The institution clearly defines and follows its guidelines and processes for financial planning and budget development, with all constituencies having appropriate opportunities to participate in the development of institutional plans and budgets.

**DESCRIPTIVE SUMMARY**

The College of the Sequoias Community College District has clearly defined the processes for financial planning and budget development. In following these processes, the District ensures there are appropriate opportunities for constituents’ participation in institutional planning and budget development.

The District’s planning and decision-making processes create venues for broad participation in budget development through Institutional Program Reviews, regularly scheduled Budget Committee meetings, and District Budget Forums.

1. Institutional Program Reviews:

   In preparing Institutional Program Reviews, units analyze data, discuss issues, develop Actions, and request resources. These include discussions of institutional effectiveness, student learning or service area outcomes, program-specific targets, and the unit’s contributions to District Objectives. Units identify and prioritize needs for personnel, facilities, supplies, equipment, and technology. (Standards I.B.1., I.B.5., II.A.2.a., II.B.4., II.C.2., III.A.6., III.B.2., III.C.2., III.D.1.a.)

   Once the program reviews are completed at the unit level, the dialogue broadens to include colleagues outside of the unit. These conversations occur in:

   - Each division and service area as funding requests are analyzed and prioritized;
   - The Technology Committee and Facilities/Safety Council when the feasibility of relevant Above-base budget are reviewed;
   - The Budget Committee meetings where Above-base funding requests are also analyzed and prioritized;
   - The District Governance Senate which reviews the prioritization from the Budget Committee and forwards it to the Superintendent/President.

   These multiple opportunities for input reflect District-wide participation in setting funding priorities for the coming year. (Standards I.B.1., I.B.4., IV.A.2., IV.B.2.)

2. Budget Committee:

   The Budget Committee’s role is to make recommendations regarding policies, planning, and other matters related to the District’s fiscal resources to the District Governance Senate. The Budget Committee’s purposes and membership are outlined below.
**Purposes**

- Make recommendations to District Governance Senate on policies, planning, and other matters related to fiscal resources;
- Review and revise budget assumptions that guide budget development;
- Monitor the District’s fiscal solvency;
- Review the draft budget in its development stages;
- Oversee, evaluate, and assess the budget development process, including making recommendations on Above-base budgeting and the District’s Faculty Obligation Number (FON);
- Provide budget analysis to the District Governance Senate;
- Develop and maintain a process for ensuring that resource allocations are linked to District planning;
- Review and discuss implementation of policies related to fiscal resources;
- Serve as a forum for dialogue on ongoing fiscal activities, such as monthly and quarterly reports;
- Review and share information on the state budget;
- Annually review and update the *College of the Sequoias 2013 Resource Allocation Manual* as needed.

**Membership**

- Administrative co-chair appointed by the Superintendent/President or designee;
- Faculty or staff co-chair elected from among members;
- Vice President, Administrative Services;
- Three administrators appointed by the Superintendent/President or his/her designee;
- Four full-time faculty appointed by the Academic Senate;
- One adjunct faculty appointed by the adjunct faculty;
- Two classified employees appointed by the classified employees;
- One confidential employee appointed by the Superintendent/President or designee;
- Two student representatives appointed by the Student Senate;
- Non-voting member: Director of Budget and Categorical Accounting or designee.

There is broad involvement in budget decisions and funding priorities through the participation of constituent group representatives on both the Budget Committee and the District Governance Senate. The Budget Committee is involved in the budget review process throughout the spring budget development period and provides regular updates to the District Governance Senate. (Standards I.B.1., I.B.4., IV.A.2., IV.B.2.)
3. District Budget Forums:

In spring 2014, the Vice President of Administrative Services held annual budget development forums and information meetings at each District site. (Standards I.B.1., I.B.4., IV.A.1.) At these gatherings the Vice President of Administrative Services presented budget assumptions, including anticipated revenues and expenses, and fiscal solvency projections for future years. The forum included discussion with and questions from the attendees. [E18]

**SELF EVALUATION**

The College of the Sequoias Community College District meets the Standard. The District has clearly defined processes for financial planning and budget development as codified in the *Integrated Planning Manual* and the *Resource Allocation Manual*. The District followed the guidelines set in the planning and resource allocation processes in development of the 2014-15 budget and the 2013-14 resource allocation process. The District ensured that all constituencies had appropriate opportunities to participate in the development of institutional plans and budgets. [E40]

The Show Cause Team Report acknowledged that:

“While COS has reconfigured its Budget Committee and developed Budget Forums in order to ensure broad participation by all constituencies, it has not yet begun a budget cycle following the newly defined model. Therefore, in order to fully meet the Standard, COS will need to ensure that its budget process for 2014-15 follow this new model” (p.26). [E119]

Since November 2013, the District has completed a budget cycle by following its guidelines and processes for financial planning and budget development. The District’s new model ensures broad participation through Institutional Program Review, regularly scheduled Budget Committee meetings, and District Budget Forums. The District completed the following budget development processes: [E39] [E40]

**January:**

- The Board of Trustees reviewed the governor’s budget and established Board of Trustees priorities aligned with the District Objectives and the Strategic Plan.
- The District Governance Senate reviewed the District Goals and Master Plan and District Objectives in the Strategic Plan.
- Fiscal administrators drafted budget assumptions to reflect District Objectives.

**February-May:**

- The Budget committee reviewed and revised budget assumptions and updated the District Governance Senate.
- Fiscal services built the tentative budget.
- The Vice President of Administrative Services held three budget forums on three campuses.
June:

- The Vice President of Administrative Services presented the tentative budget to the Board of Trustees for approval which included District Goals and Objectives.

September:

- The final budget was presented to the Board of Trustees which includes the relationship between resource allocations and the District Goals.
- The Board of Trustees approved the final budget.

In addition, the District completed the following resource allocation processes to ensure broad participation in the resource allocation process: [E40]

- Requests for funding were made through Institutional Program Review or District Objectives.
- Divisions and departments reviewed funding requests.
- Service areas prioritized funding requests.
- Feasibility studies were completed by the Technology Committee and Facilities/Safety Council.
- The Budget Committee utilized a rubric to prioritize Above-base resource requests.
- District Governance Senate reviewed the prioritized lists and made a recommendation to the Superintendent/President.
- The Superintendent/President prepared a final prioritized list and reported to the Board of Trustees.

The District adhered to all budget development and resource allocation processes as described in the Resource Allocation Manual and the Integrated Planning Manual. These processes are sustainable and will continue to include input from appropriate constituencies as outlined in the planning model.

**ACTIONABLE IMPROVEMENT PLANS**

None.
Standard III.D.4  Financial resource planning is integrated with institutional planning. The institution systematically assesses the effective use of financial resources and uses the results of the evaluation as the basis for the improvement of the institution.

DESCRIPTIVE SUMMARY

The College of the Sequoias Community College District integrates financial resource planning with institutional planning, assesses the effective use of financial resources, and uses the results of that evaluation as the basis for institutional improvement.

The District assessed and revised its integrated planning processes in spring 2013. This review/revision process included refining its planning lexicon to more clearly communicate the ongoing systematic evaluation cycle that it uses to measure the effectiveness of planning, Program Review, resource allocations, and program outcomes.

In the District’s cycle of integrated planning, resources are allocated based on connections with student learning outcomes, service area outcomes, and/or District Objectives.

The three processes that link resource allocations to institutional planning are as follows:

1. **Institutional Program Review**

   Institutional Program Review captures unit-level planning for instructional, student service, and administrative units. These Institutional Program Reviews describe how each unit will contribute to the achievement of the District Objectives and include an analysis of unit-specific data, the identification of strengths and weaknesses, a report on prior year Actions, a link to the assessment of student learning, the development of Actions for the coming year, and the identification of resources, if any, that are needed to support the initiatives. If a District Objective or Action requires funding, the responsible party for that Action includes the funding request through Institutional Program Review. [E85]

2. **Development of the Tentative Budget**

   The budget development process reinforces the link between institutional planning and resource allocations. In January, fiscal administrators draft budget assumptions to reflect District Objectives and external realities, such as the level of state apportionment. Using these assumptions and feedback from the Budget Committee, the District Governance Senate, and District Budget Forums, the Vice President of Administrative Services develops and presents the tentative budget to the Board of Trustees for approval. The presentation includes links between the resource allocations and the District Goals and Objectives. [E22] [E39] [E40]

3. **Base Budget Re-allocation**

   During the budget development process, a unit (department/division/office) may elect to re-allocate funds from one budget category to another within its discretionary base budget. The unit area manager request includes a justification based on how this
reallocate will support the unit’s ability to address an issue identified in its annual program review and/or contribute to achievement of a District Objective. The unit area manager will meet with fiscal services administration to implement the movement of funds. A summary report of re-allocated base budget funds will be presented to the Budget Committee annually. [E8]

The District’s revised planning processes include assessments of the effective use of financial resources. The District employs these systematic assessments as the basis to improve the institution. This evaluation and assessment is multi-faceted and includes the following processes:

1. **Annual Report on the Strategic Plan**

   This annual report summarizes progress on Actions and District Objectives; analyzes these outcomes in terms of their effectiveness in moving the District toward achievement of the District Goals; identifies the District Objectives that will be the basis for resource allocations in the coming year; and includes a summary of the financial resources required. Thus, this document serves as an evaluation of the District’s effective use of its resources. The District then develops, edits, or augments Actions for subsequent years based on these evaluations. (Standards I.B.1., I.B.5.) [E2] [E19]

2. **Institutional Program Review**

   As part of program review, the assessments of student learning outcomes and service area outcomes are annually assessed and documented. Moreover, units are required to track and record the impact of allocated Above-base resources on the unit outcomes and District Objectives. Since the measurement of these outcomes reflect how the District expends its human and fiscal resources, improvements in these outcomes demonstrate the District’s effective use of its resources toward institutional improvement. (Standards I.B.1, II.A.1.c, II.B.4, II.C.2) [E21] [E85]

**SELF EVALUATION**

The College of the Sequoias Community College District meets this Standard. The District’s resource allocation process and budget development process ensure that financial resource planning is integrated with institutional planning. The District systematically assesses the effective use of financial resources and uses the results of the evaluation as a basis for improvement as described in the *Integrated Planning Manual* and the *Resource Allocation Manual*.

The November 2013 Show Cause Team Report indicated that:

“In order to fully meet the standard, the College will need to complete its first assessment of the District’s newly revised integrated planning model which is scheduled to take place in spring 2015, and every three years thereafter” (p.32). [E119]
Although the first three-year assessment of the planning cycle will not take place until spring 2015, the District completed numerous annual assessments of planning and resource allocation processes. These assessments have led to institutional improvements. In addition, the District has updated the planning and resource allocation manuals based on those assessments. [E31] [E32] [E42] [E43] [E59] [E60] [E69] [E80]

The District has completed the budget development and resource allocation processes for 2014-15. In completing these processes, financial planning was linked to institutional planning. These linkages can be found in Institutional Program Review, the development of the tentative budget, and in base budget reallocation. [E17] [E22] [E85]

The District has systematically evaluated the effective use of financial resources for the 2013-14 budget and used that evaluation as a basis to improve the institution. The improvements were documented in annual program reviews (unit level improvements) and the Annual Report on the Strategic Plan (District-wide improvements). The Annual Report on the Strategic Plan analyzes progress towards achieving District Objectives, including a summary of financial resources that were required. [E19] [E86]

The District is committed to sustaining the integrated planning and resource allocation processes. These processes ensure that financial resource planning is integrated with institutional planning which include an evaluation of the effective use of financial resources. The District systematically assesses the effectiveness of financial resources and uses the results of the evaluation as a basis for improvement of the institution as evidenced by the Institutional Program Review process, the Annual Report on the Strategic Plan, and as codified in the Resource Allocation Manual and the Integrated Planning Manual.

**ACTIONABLE IMPROVEMENT PLANS**

None.
**Standard IV.B.2.b** The president guides institutional improvement of the teaching and learning environment by the following: establishing a collegial process that sets values, goals, and priorities; ensuring that evaluation and planning rely on high quality research and analysis on external and internal conditions; ensuring that educational planning is integrated with resource planning and distribution to achieve student learning outcomes; and establishing procedures to evaluate overall institutional planning and implementation efforts.

**DESCRIPTIVE SUMMARY**

The College of the Sequoias Community College District is in compliance with Standard IV.B.2.b. as evidenced by the Superintendent/President’s guidance of institutional improvement of the teaching and learning environment through the implementation of integrated planning processes. These planning processes include establishing District Goals, linking educational planning to resource allocation, and assessing institutional planning processes. These processes rely on research, data, and analysis. [E38] [E39] [E40]

The Superintendent/President guides institutional improvement of the teaching and learning environment by monitoring and overseeing the District’s adherence to its integrated planning processes and participatory governance structure. The Superintendent/President’s role in each component of this standard is described below.

**A collegial process that sets values, District Goals, and priorities**

The *College of the Sequoias 2013 Integrated Planning Manual* outlines the process and timeline for the development of District Goals and the measurement of District Objectives.

The following processes and tasks were completed since the Show Cause Evaluation Team Visit in November 2013 and will occur on an ongoing basis in the future:

**Annual Report on the Strategic Plan (Standards I.B, I.B.3, I.B.4, IV.B.2.b):**

- February 2014 - The Institutional Planning and Effectiveness Committee requested progress reports on unit action plans from responsible parties (i.e. administrators and committee co-chairs). [E70]
- March/April 2014 – Responsible parties submitted progress reports, including corroborating quantitative and qualitative data and analyses, to the Institutional Planning and Effectiveness Committee. Based on a review of these reports, the Institutional Planning and Effectiveness Committee co-chairs drafted the Annual Report on the Strategic Plan. [E71]
- May/June 2014 – The draft of the Annual Report on the Strategic Plan was distributed for District-wide review and comment. The District Governance Senate gathered this feedback and prepared a final draft of the report which was submitted to the Superintendent/President and presented to the District’s Board of Trustees.[E19] [E59]
- August 2014 – The Annual Report on the Strategic Plan was distributed to internal and external constituencies.

- January 2014 – the co-chairs of the District Governance Senate charged the Institutional Planning and Effectiveness Committee to develop the 2015-2025 Master Plan. [E53]
- February 2014 – The Institutional Planning and Effectiveness Committee proposed a process for preparing the Master Plan. Members of the Master Plan Task Force were recruited from the following groups: faculty, classified employees, administrators, and students. The Master Plan Task Force and Institutional Planning and Effectiveness Committee presented the approved Master Plan development process at a District-wide forum. [E72] [E96] [E118]
- March 2014 – The Office of Research, Planning and Institutional Effectiveness gathered data and led a discussion reviewing the data with the Institutional Planning and Effectiveness Committee and the Master Plan Task Force. [E73] [E95]
- April 2014 - Challenges identified by an analysis of the data and suggested preliminary District Goals were distributed to Academic Senate Executive Board, Institutional Planning and Effectiveness Committee, Deans Council, and Senior Management Council for discussion and feedback. The co-chairs of the Master Plan Task Force and the Institutional Planning and Effectiveness Committee conducted a District-wide forum where an update on the Master Plan development process was presented. [E74] [E118]
- May 2014 – The Academic Senate held a Summit on the Master Plan where students, faculty, staff, members of the Board of Trustees, and community members discussed and provided feedback on the preliminary District Goals and the District’s current and anticipated challenges. Based on this feedback, revisions were made to the draft of the Master Plan. [E5]
- August 2014 – The draft Master Plan District Goals and challenges were presented to the faculty and staff during the fall convocation. Attendees were invited to submit feedback on the draft. [E116]


- September 2014 – The Superintendent/President requested that the District Governance Senate co-chairs initiate a review of the District Mission and appoint a task force to develop a process for data review, and the solicitation of feedback. [E62] [E63]

Ensuring that evaluation and planning rely on high quality research and analysis on external and internal conditions

The Superintendent/President guided the development of the District’s integrated planning cycle that acknowledges the central role of research. Analysis of data is integral to the development of the institution’s long-term and short-term plans, as well as the annual assessment of progress toward achieving District Goals. (Standards I.B.2, I.B.4, II.A.1, II.B.4, II.C.2)

Examples illustrating the application of research and analysis to the District’s evaluation and planning are outlined below:
December 2013-October 2014: Institutional Program Review
In developing program reviews, academic units evaluated enrollment and student success data along with student learning outcomes. Student services and administrative services utilized service area outcomes data. Units requested additional quantitative and qualitative data as needed. For example:

- The Business Division requested the number of students who earned a certificate or degree in the academic years of 2011-2012 and 2012-2013.
- The Math department requested the success and retention rates over the last three years for both the District and the State for comparison purposes. Additionally, the division requested data regarding fill rates for the same period.
- The Philosophy department requested a pre/post comparison of student values for the fall 2013 and spring 2014 semesters.
- The Facilities department requested a District-wide survey to assess strengths and weaknesses and improve the effectiveness of services.
- The Public Information and Marketing Office requested student survey data from the District’s application system to identify which channels of communication and marketing are most effective.

January-October 2014: Master Plan 2015-2025
To develop the Master Plan, the District gathered data by conducting both external and internal scans. External scans included national and state trends in higher education, regional population trends and demographics and local economic trends. Internal scans included enrollment trends, student demographics, student outcomes, and student perceptions.

January-September 2014: Resource Allocation
To assess the Above-base Resource Allocation Process, the Budget Committee developed and administered a survey to assess the effectiveness of the allocation process.

February-June 2014: Annual Report on the Strategic Plan
The annual report includes 10 assessments and 21 measures for the eight District Objectives. Examples of the data and metrics employed included successful course completion rates, counts of counseling appointments by delivery time (day/evening), and the proportion of Above-base resources allocated that are directly tied to District Objectives.

April-October 2014: Student Equity Plan
The plan’s parameters were reviewed with the Student Services deans, the Vice President of Student Services, the Equity Committee and the Office of Research, Planning and Institutional Effectiveness. Feedback from faculty members and others was incorporated in a draft plan.

September-October 2014: District Mission
The review of the District Mission relied on qualitative and quantitative data and emergent trends in higher education.
**Ensuring that educational planning is integrated with resource planning and distribution to achieve student learning outcomes**

Based on the evaluation of both qualitative and quantitative data within Institutional Program Review and budget allocation processes, Above-base resources are requested and prioritized based on justifications related to student outcomes and/or District Objectives. In the program review process, units assess their performance, including the assessment of student learning outcomes and service area outcomes, to identify and prioritize needs for personnel, facilities, supplies, equipment, and technology. The Budget Committee then prioritizes these requests across all units in the District using a rubric whose criteria include the achievement of student learning outcomes and/or District Objectives. Lastly, these prioritizations are finalized by the Superintendent/President and presented to the Board of Trustees for approval.

Based on an evaluation of the program review process, the District determined that augmentations to base-budgets would not be included therein. As a result, the District has begun developing a new process for the augmentations of base budgets. These augmentation requests are based on data analysis and links to student learning/service area outcomes as described in either program reviews or the Annual Report on the Strategic Plan. To achieve this, revisions to Administrative Procedure 3261, “Request for Personnel, Budget for Augmentations, Facilities or Equipment,” are necessary and are being considered through the District’s participatory governance processes. [E12]

In addition, Administrative Procedures 3262, “Submitting and Ranking Tenure Track Faculty,” and 3263, “Submitting and Ranking Tenure Track Student Services Instructional and Non-instructional Faculty Vacancies,” describe the use of data analysis and evaluation related to the achievement of student learning outcomes with respect to the hiring of instructional and non-instructional faculty. [E12]

Through these processes, financial planning is linked to educational planning and the achievement of student learning outcomes. (Standards I.B.2, I.B.4, III.D.1, IV.B.2.b)

**Evaluate overall institutional planning and implementation efforts**

Although the first three-year assessment of the planning cycle will not take place until spring 2015, the District completed numerous annual assessments of planning and resource allocation processes. These assessments have led to institutional improvements. In addition, the District has updated the planning and resource allocation manuals based on those assessments. [E32] [E42] [E43] [E69] [E80]

Illustrations of such evaluations include:

1. Based on an evaluation of the past year’s operations, Senates/Committees/Councils submit proposed updates or changes to the Governance and Decision Making, Integrated Planning, and Resource Allocation manuals to the District Governance Senate. [E59] [E66]
2. The Institutional Program Review Committee developed an audit process for program review wherein the committee will, among other things, evaluate the use of data by the units in creating their plans and evaluating their programs. In addition, the results
of the audit will be used to improve the Institutional Program Review templates, training, and processes. [E79] [E81] [E88]

The District’s integrated planning cycle includes evaluations of the effectiveness of the implementation of District plans. These evaluations include:

1. Annual progress reports on unit Action plans are requested by the Institutional Planning and Effectiveness Committee from responsible parties (i.e. administrators and committee co-chairs). These progress reports include corroborating quantitative and qualitative data and analyses and summarize the unit’s overall efforts in the achievement of District Objectives. [E70]

2. The evaluation of prior year’s Actions and their impact on District Objectives and/or unit outcomes is included within the Institutional Program Review template. The utilization of any allocated Above-base resources is also evaluated. [E85]

(Standards I.B.6., IV.A.5.)

SELF EVALUATION

The College of the Sequoias Community College District meets this Standard. The Superintendent/President guides institutional improvement of the teaching and learning processes. The Superintendent/President hired a Director of Research, Planning and Institutional Effectiveness who has been at the District for over one year and has established processes for strong systematic evaluation that rely on qualitative and quantitative data and analysis.

The Show Cause Team Report (November 2013) found that:

“…the Superintendent/President guides institutional improvement, it was also noted that the Director of Research, Planning and Institutional Effectiveness has only been in his position for two months. ... In order to fully meet the Standard, the institution must demonstrate that systematic evaluation, relying on high quality research and analysis, leads to improvement during the next evaluation cycle” (p.37). [E119]

Since November 2013, the District has completed all integrated planning processes and has addressed all timelines described in its Integrated Planning, Resource Allocation, and Governance and Decision-making manuals. In doing so, the District analyzed and evaluated both qualitative and quantitative data to improve the implementation of its processes and institutional planning.

As detailed in the Descriptive Summary, the District completed the following planning processes that relied on research and analysis:

- February-June 2014: Annual Report on the Strategic Plan
- January-October 2014: Master Plan 2015-2025
- September-October 2014: District Mission
- December 2013-October 2014: Institutional Program Review
- January-September 2014: Resource Allocation
In addition, the District systematically evaluated its processes, relying on sound research and analysis as follows:

- **April-September 2014: Annual Year-End Evaluation**
  The Annual Year-End Evaluation collected data on how well senates/committees/councils followed procedures, completed routine business, and progressed on their initiatives. [E52] [E117]

- **April 2014: Senate/committee/council year-end surveys**
  The senate/committee/council surveys measured committee member’s satisfaction with the workload, roles and responsibilities, availability of resources, and effectiveness of meeting initiatives. [E47]

- **May 2014: Above-base allocation survey**
  The Budget Committee, in conjunction with the Office of Research, Planning and Institutional Effectiveness, prepared and distributed a survey to the participants (those requesting funding and members of the Budget Committee) of the Above-base Resource Allocation Process and analyzed the data for future modifications of the process. [E25]

Furthermore, the District evaluated and assessed several programmatic areas, related to the District Objectives. Examples of these studies are:

- Prerequisite for social science courses; [E104]
- Early Alert study. [E108]

Through the evaluation of processes and planning, the District has demonstrated that it relies on systematic evaluation that leads to improvement. The Superintendent/President guides institutional improvement of the teaching and learning environment through these processes.

**ACTIONABLE IMPROVEMENT PLANS**

None.
Recommendations
2013 Recommendation 1 – Planning

(Replaces and clarifies 2012 Recommendation 1)

In order to fully meet the Standards, the team recommends that the College follow its new Model for Integrated Planning to demonstrate the integration of institutional planning, resources allocation, implementation and re-evaluation. These processes should include appropriate participation from constituent groups and should be evaluated based upon analyses of both quantitative and qualitative data. (Standards I.B.3, III.D.1.a, III.D.1.d, II.D.4, IV.B.2.b)

INTRODUCTION

In response to the Show Cause sanction, College of the Sequoias established an Accreditation Response Task Force in February 2013. The 40 Accreditation Response Task Force members represented each constituency of the internal college community. The Task Force was a cadre of colleagues, who met weekly to assess current processes, brainstorm revisions/recommendations, implement necessary changes in policy and procedures, and serve as first readers of key documents.

Through this collegial process, the Accreditation Response Task Force developed three manuals which describe the District’s processes for governance, integrated planning, and resource allocation. In order to elicit feedback, the initial drafted manuals were widely distributed across the District through the use of forums, summits, and District-wide email messages. These manuals were formally adopted in spring 2013 utilizing the existing governance processes. In August 2013, the District began implementing the policies and procedures described within the following three documents:

- Governance and Decision-making Manual
- Integrated Planning Manual
- Resource Allocation Manual

BACKGROUND

When the Show Cause Evaluation Team Visited the District in fall 2013, the District had made significant progress in executing the processes and Actions specified by these three manuals. Team members noted the following achievements:

Governance and Decision-Making Manual:

- The three District Senates began following new reporting structures. For example, the Equity Committee began reporting directly to the Academic Senate instead of the District Governance Senate and several committees were redefined as Councils or Workgroups. In addition, some groups were either eliminated or restructured to meet on an ad-hoc basis. [E38] [E89]
- The membership and charges of Senates/Committees/Councils were clarified and explicitly defined. [E38]
• Senate/Committee/Council co-chairs provided training on each committee’s unique role in the integrated planning processes.  [E1]
• Senate/Committee/Council co-chairs worked with their membership to identify expectations and responsibilities for each of the committees/councils/senates as set forth in the Governance and Decision-Making Manual. These were then used to develop and plan each group’s initiatives for the 2013-14 academic year. [E8] [E34] [E50] [E61]
• Senates/Committees/Councils had begun their process of self-evaluation by setting annual initiatives.  [E48]

**Integrated Planning Manual:**

• The District developed a 10-year College of the Sequoias Institutional Planning Calendar which includes specific planning timelines for Mission review, Master Plan development, and Strategic Plan development.  [E45]
• The Institutional Program Review Committee updated the Institutional Program Review Processes. Program reviews are now completed using TracDat, a web-based data tracking system.  [E10] [E65] [E82] [E113]
• The District increased research capacity through the hiring of additional personnel and the creation of a workgroup to facilitate collaboration between the Office of Research, Planning and Institutional Effectiveness and the Technology Services department in order to support data-driven institutional planning and resource allocation.  [E105]

**Resource Allocation Manual**

• Within Program Review, units evaluated existing ongoing budgets as well requested Above-base resources.
• The initial stage of Above-base resource allocation began with the ranking of resource requests in the following areas: Student Services, Academic Services, Administrative Services, and the office of the President/Superintendent.  [E13] [E93] [E97] [E107]

The 2013 Show Cause Evaluation Team Report concluded that the College of the Sequoias needed more time to complete its “new integrated planning model to ensure integration as it begins its resource allocation process following its newly developed plans and the resulting implementation and re-evaluation processes, based on an analysis of both quantitative and qualitative data” (p. 44).  [E119]

In addition, the team also found “although most planning processes are new and a complete cycle has not been completed, COS only needs to continue to implement the planning process according to their calendar...” (p. 40).  [E119]

The 2013 visiting team determined that “…the College still must demonstrate systematic evaluation that leads to improvement during the next evaluation cycle” (p. 43).  [E119] Given this finding, the letter from the Commission, dated February 7, 2014, indicated that “the 2013 Show Cause Evaluation Team has written a new recommendation to replace and clarify 2012 Recommendation 1, and it is labeled 2013 Recommendation 1.”  [E120]
**Actions Taken to Resolve 2013 Recommendation 1 – Planning**

In order to complete the District’s planning processes and demonstrate sustainability, the District followed the processes outlined in its *Governance and Decision-making, Integrated Planning*, and *Resource Allocation* manuals. The following processes and tasks were completed since the Show Cause Evaluation Team Visit in November 2013 and will occur on an ongoing basis:

**Annual Report on the Strategic Plan (Standards I.B, I.B.3, I.B.4, IV.B.2.b):**

- February 2014 - The Institutional Planning and Effectiveness Committee requested progress reports on unit action plans from responsible parties (i.e. administrators and committee co-chairs). [E70]
- March/April 2014 – Responsible parties submitted progress reports, including corroborating quantitative and qualitative data and analyses, to the Institutional Planning and Effectiveness Committee. Based on a review of these reports, the Institutional Planning and Effectiveness Committee co-chairs drafted the Annual Report on the Strategic Plan. [E71]
- May/June 2014 – The draft of the Annual Report on the Strategic Plan was distributed for District-wide review and comment. The District Governance Senate gathered this feedback and prepared a final draft of the report which was submitted to the Superintendent/President and presented to the District’s Board of Trustees. [E19] [E59]
- August 2014 – The Annual Report on the Strategic Plan was distributed to internal and external constituencies.

**Master Plan Development Process (Standards I.B, I.B.2, I.B.3, I.B.4, IV.B.2.b):**

- January 2014 – the co-chairs of the District Governance Senate charged the Institutional Planning and Effectiveness Committee to develop COS Master Plan. [E53]
- February 2014 – The Institutional Planning and Effectiveness Committee proposed a process for preparing the Master Plan. Members of the Master Plan Task Force were recruited from the following groups: faculty, classified employees, administrators, and students. The Master Plan Task Force and Institutional Planning and Effectiveness Committee presented the approved Master Plan development process at a District-wide forum. [E72] [E96] [E118]
- March 2014 – The Office of Research, Planning and Institutional Effectiveness gathered data and led a discussion reviewing the data with the Institutional Planning and Effectiveness Committee and the Master Plan Task Force. [E73] [E95]
- April 2014 - Challenges identified by an analysis of the data and suggested preliminary District Goals were distributed to Academic Senate Executive Board, Institutional Planning and Effectiveness Committee, Deans Council, and Senior Management Council for discussion and feedback. The co-chairs of the Master Plan Task Force and the Institutional Planning and Effectiveness Committee conducted a District-wide forum where an update on the Master Plan development process was presented. [E94] [E118]
May 2014 - Academic Senate held a Summit on the Master Plan where students, faculty, staff, members Board of Trustees, and community members discussed and provided feedback on the preliminary District Goals and the District’s current and anticipated challenges. Based on this feedback, revisions were made to the draft of the Master Plan. [E5]

August 2014 – The draft Master Plan District Goals and challenges were presented to the faculty and staff during the fall convocation. Attendees were invited to submit feedback on the draft. [E116]


- September 2014 – The Superintendent/President requested the District Governance Senate co-chairs initiate a review of the District Mission, appoint a task force to develop a process for data review and solicitation of feedback. [E62] [E63]


- October 2013 – As a part of the program review process, units included a regular and systematic evaluation of their outcomes and assessment processes. [E85]
- December 2013 – The Institutional Program Review Committee evaluated its process for that year and used that assessment to develop the process for next year’s Institutional Program Reviews, including the calendar, template, training, and data requirements. [E47] [E83] [E87]
- February/March 2014 – Institutional Program Review Committee members provided hands-on training for unit representatives and disseminated the Institutional Program Review Manual describing the new program review process. [E84]
- April/May 2014 – The Institutional Program Review Committee updated sections of the Governance and Decision-making Manual and the Integrated Planning Manual to reflect the new program review processes. [E39] [E59]
- August/September 2014 – The Institutional Program Review Committee developed an audit process for program review wherein the committee will, among other things, evaluate the use of data by the units in creating their plans and evaluating their programs. In addition, the results of the audit will be used to improve the program review templates, training, and processes. [E79] [E88]
- September 2014 – Units completed and submitted program review drafts to responsible administrators who provided feedback and guidance for improvement. [E86]

**Senate/Council/Committee evaluations (I.B, I.B.3, I.B.6, III.D.4, IV.B.2.b)**

- January/February 2014 –Senates/Committees/Councils completed mid-year reports.
- April 2014 - Senates/Committees/Councils completed Evaluation Surveys.
- April 2014 - Senates/Committees Councils completed Year-End Reports.
- April/May 2014 – End of Year Reports and Evaluations were distributed to co-chairs of the Senates/Committees/Councils.
May 2014 – Senates/Committees/Councils submitted proposed updates or changes to the Governance and Decision-making, Integrated Planning, and Resource Allocation manuals to the District Governance Senate. [E59]

August 2014 – District Year-End Committee Evaluation Reports were prepared by Academic Senate and District Governance Senate. [E52] [E117]


Above-base Resource Allocation

November 2013 – Instructional Council, Students Services Council, Administrative Services, and the President’s office prioritized Above-base resource requests within the respective service areas. These prioritized lists were forwarded to the Budget Committee for District-wide prioritization. [E13] [E93] [E97] [E107]

January 2014 – The Budget Committee requested a technical and feasibility assessment of Above-base requests from the Technology Committee and the Facilities/Safety Council. [E26] [E35] [E68] [E111]

February 2014 – The Budget Committee used the rubric to prioritize Above-base resource requests and forwarded them to District Governance Senate. [E27] [E28] [E36]

March 2014 – The District Governance Senate reviewed the prioritized lists and made recommendations to the Superintendent/President. The Superintendent/President reviewed the prioritized lists, determined which requests received funding, and presented a final report to the Board of Trustees. [E21] [E55] [E56]

March/April 2014 – The Budget Committee, in conjunction with the Office of Research, Planning and Institutional Effectiveness, prepared and distributed a survey to the participants (those requesting funding and members of the Budget Committee) of the Above-base Resource Allocation Process and analyzed the data for future modifications of the process. [E25]

Budget Development

January 2014 - The Board of Trustees reviewed the Governor’s January Budget and established Board priorities aligned with the District’s Objectives in the Strategic Plan for 2014-2015. [E24]

January 2014 – Fiscal administrators drafted budget assumptions that reflected the District’s Mission, District Goals and Objectives, and forwarded the budget assumptions to the budget committee. [E26] [E40]

February through May 2014 – The Budget Committee reviewed and revised the budget assumptions as warranted and updated the District Governance Senate on the status of the budget assumptions. [E27] [E28] [E29] [E30] [E31] [E32] [E33]

March 2014 – Fiscal Services built a tentative budget and provided area managers with tentative allocations. [E46] [E81]

March 2014 – The Vice President of Administrative Services held a budget forum at each campus to present the District’s tentative budget and assumptions. [E18]
• June 2014 – The Vice President of Administrative Services presented the tentative budget (including links between resource allocations and the District’s Mission, District Goals, and Objectives) to the Board of Trustees for approval. [E22] [E46]
• July/August 2014 – The Superintendent/President, Vice President of Administrative Services and Fiscal Services staff adjusted the District’s budget based on changes in the state budget. [E22]
• September 2014 – The Superintendent/President presented the final budget along with the College of the Sequoias Annual Report on the Strategic Plan (including a description of the relationship between resource allocations and the District’s Mission, District Goals, and Objectives) to the Board of Trustees. The Board of Trustees approved the final budget. [E23]

Ongoing Training/Education (Standards I.B.3, I.B.4, I.B.6, II.A.2.a, III.D.1.d, III.D.4, IV.B.2.b)

• August/September – Senate, Committee, and Council co-chairs provide training to all governance groups at their initial meetings of the year regarding responsibilities, expectations, and charges. [E4]
• September/October – The co-chairs of the Budget Committee provide training on the use of the rubric for ranking Above-base funding requests.
• February – Institutional Program Review Committee members conduct training for faculty, staff, and administrators who will complete an Institutional Program Review during the current year. [E77] [E78] [E84] [E113]
• Monthly – Faculty, staff, and administrators present current developments and important information regarding governance, planning, resource allocation, and the implementation of processes to the District’s constituents. [E18] [E44]
• Annually – Members of academic, administrative, and service area units participate in outcomes and assessment training during semester convocations and “Dialog Days.” [E102]
• Annually – The Research Advisory Workgroup provides training for faculty, staff, and administrators in the use and analysis of data available through the college’s Extended Information System. [E103]

In addition to the items described above, the District established various task forces to evaluate and modify existing and newly created systems and processes. As described in the Governance and Decision-making Manual, task forces are formed to create a venue for accomplishing specific projects or to address specific issue that require timely and concentrated energy. Task forces are dissolved when the issues they have been created for have been addressed and/or subsumed within other institutional structures. Examples of such task forces include: The Implementation Task Force, the TracDat Task Force, and the Master Plan Task Force. [E69] [E96] [E112]
The actions taken to resolve 2013 Recommendation 1 also address the following Actionable Improvement Plans from the 2013 Show Cause Report: [121]

Actionable Improvement Plan 1: The Superintendent/President, with members of the Implementation Task Force and the District Governance Senate, will ensure compliance with the timelines and processes in the *College of the Sequoias 2013 Integrated Planning Manual* for all institutional planning processes. (Standards I.A.3., I.B.2., III.D., III.D.1., II.D.1.a., III.D.4., IV.A.2., IV.A.2.a., IV.A.3., IV.A.5., IV.B.2.b.)

Actionable Improvement Plan 2: The Superintendent/President, with the District Governance Senate, will ensure compliance with the timelines and processes in the *College of the Sequoias 2013 Integrated Planning Manual* relating to the revision of the District Mission. (Standard I.A.4)

Actionable Improvement Plan 3: *The Superintendent/President, with the Institutional Program Review Committee and the Academic Senate, will ensure the creation and implementation of the new Program Review template. Implementation of the revised institutional program review process will begin in spring 2014.* (Standards I.A.4, IV.A.2.b)

Actionable Improvement Plan 5: The Superintendent/President, with the Budget Committee and the Implementation Task Force, will ensure compliance with the processes of budget development and Above-base resource allocation in the *College of the Sequoias 2013 Resource Allocation Manual.* (Standards I.B.4., III.D.1.b., III.D.1.d., III.D.4.)

Actionable Improvement Plan 6: The Outcome and Assessment Committee, the Institutional Planning and Effectiveness Committee, the Institutional Program Review Committee, the Budget Committee, and the Office of Academic Services will ensure outcomes assessments are tied to institutional improvement and resource allocation according to the *College of the Sequoias 2013 Integrated Planning Manual, College of the Sequoias 2013 Resource Allocation Manual,* and *College of the Sequoias 2013 Governance and Decision-Making Manual.* (Standards II.A.1.a., II.A.1.c.)

Actionable Improvement Plan 11: The Superintendent/President, with members of the Implementation Task Force and the District Governance Senate, will ensure compliance with roles and responsibilities placed upon each of the governance groups in the *College of the Sequoias 2013 Governance and Decision-making Manual.* (Standards III.D.1.d., IV.A.2., IV.A.2.a., IV.A.3., IV.A.5., IV.B.2.b.)

Actionable Improvement Plan 12: The vice president of administrative services will conduct an open forum at each District site in spring 2014 and each spring thereafter to provide updates about the District’s financial status and processes, as well as to create a venue for dialogue about financial issues. (Standards III.D.1.d., III.D.2.c.)

Actionable Improvement Plan 13: The vice president of administrative services and the Budget Committee will ensure that the District implements the recently developed processes to assess the effective use of Above-base funds. (Standard III.D.2.a.)
Actionable Improvement Plan 14: The District Governance Senate will ensure that the Senate/Committee/Council Evaluation in spring 2014 includes an assessment of representatives’ routine distribution of information to constituent groups. (Standard III.D.2.c.)

Actionable Improvement Plan 17: All committee co-chairs will provide training on each committee’s unique role in the integrated planning processes.
**Recommendation 3 – Research Capacity**

In order to fully comply with the Standards, the team recommends that the College increase the research capacity of the institution in order to compile and provide data to guide institutional planning and resource allocation, program review and assessment, and decision-making for institutional effectiveness (Standards I.B.2, I.B.3, I.B.6, II.A.1.a, II.A.1.c, II.A.2.e, II.A.2.f, II.B.4, III.A, IV.B.2.b)

**INTRODUCTION**

After the Show Cause sanction was imposed, College of the Sequoias established an Accreditation Response Task Force which was charged with developing processes for integrated planning, governance and decision-making, resource allocation, and assuring that the District addressed all deficiencies in meeting the Accreditation Standards. Through a process of development, dialogue, and District-wide feedback, this group developed three manuals to guide the District as it moves forward. In August 2013, the District implemented the following three manuals wherein data is used to guide institutional planning, Institutional Program Review, outcomes assessment, resource allocation, and decision-making for institutional effectiveness:

- **Governance and Decision-making Manual**
- **Integrated Planning Manual**
- **Resource Allocation Manual**

The District increased research capacity by hiring a Director of Research, Planning and Institutional Effectiveness; creating additional mechanisms for data support; and strengthening the relationship between Technology Services and the Office of Research, Planning and Institutional Effectiveness. In addition, the District codified previously established processes involving long-term and short-term planning, resource allocation, Institutional Program Review and decision-making in formal documents. To ensure sustainability, these new documents described responsible parties and implementation timelines. Lastly, the District employed a web-based data tracking system, TracDat, to allow units to input data on assessments and store data for Institutional Program Reviews. Governance and operational groups also track progress on initiatives and District Objectives. Reports generated by the system will be used as data in the evaluation of processes and units. [E10] [E65] [E82] [E113]

**BACKGROUND**

During their review of the District in fall 2013, the Show Cause Evaluation Team noted the following achievements: [E119]

- In fall 2013, the College hired a Director of Research, Planning and Institutional Effectiveness that plays an essential leadership role at the District by reporting directly to the Superintendent/President and serving on critical district committees, councils, and work groups.
• Data is used to guide institutional planning, Program Review, outcome assessment, resource allocation, and decision-making for institutional effectiveness.
• Formal processes were developed to request data to increase efficiency in the Office of Research, Planning and Institutional Effectiveness, Technology Services, and for end-users of the data.
• The Solutions and Innovations Workgroup was developed and is comprised of key members of the Office of Research, Planning and Institutional Effectiveness and office of Technology Services. This workgroup increased communication and collaboration, reduced replication of requests, and ensured data integrity.

The Show Cause Evaluation Team Report concluded “...the College must demonstrate during its next evaluation cycle that data continues to guide effective planning, assessment, and decision-making” (p. 47). [E119]

**ACTIONS TAKEN TO RESOLVE 2012 RECOMMENDATION 3**

In order to increase research capacity, to compile and provide data to guide institutional planning and resource allocation, program reviews and assessment, and decision making for institutional effectiveness, the District completed the following Actions since the Show Cause Evaluation Team visit in November 2013:

**Master Plan Development Process (Standards I.B, I.B.2, I.B.3, I.B.4, IV.B.2.b):**

• February 2014 – The Office of Research, Planning and Institutional Effectiveness developed and proposed a set of data metrics to be used for preparing the Master Plan. The Institutional Planning and Effectiveness Committee reviewed and approved these metrics. [E54]

• March 2014 – The Office of Research, Planning and Institutional Effectiveness gathered data (such as regional population trends and demographics, local economic trends, enrollment trends, student demographics, and student outcomes) and led a discussion reviewing the data with the Institutional Planning and Effectiveness Committee and the Master Plan Task Force. [E73] [E95]

• March 2014 – Divisions met to review, discuss, and analyze relevant unit data (including measures of efficiency, demographics, and student success) to create long-term targets. At this time, the divisions also identified discrepancies in existing data and suggested additional data which may be useful in this process. [E67] [E96]

• April 2014 - The Institutional Planning and Effectiveness Committee, in conjunction with the Master Plan Task Force, identified challenges based on an analysis of data and then developed preliminary District Goals. In a joint meeting, the Academic Senate Executive Board, Institutional Planning and Effectiveness Committee, Deans Council, Master Plan Task Force, and Senior Management Council discussed these challenges, with the accompanying data and provided feedback on the preliminary District Goals. The co-chairs of the Master Plan Task Force and the Institutional Planning and Effectiveness Committee conducted a District-wide forum where an update on the Master Plan development process was presented, including an update of the data metrics. [E94] [E118]
May 2014 - Academic Senate held a Summit on the Master Plan where students, faculty, staff, members Board of Trustees, and community members discussed and provided feedback on the preliminary District Goals and the District’s current and anticipated challenges. Based on this feedback, revisions were made to the draft of the Master Plan. [E5]

July 2014 – The Vice President of Administrative Services and the Dean of Facilities drafted the Facilities Chapter of the Master Plan based on data (including population growth, enrollment trends, assignable square footage, and projected unit growth). [E96]

August 2014 – The draft Master Plan data, District Goals, and challenges were presented to the faculty and staff during the fall convocation. The Master Plan Task Force gathered feedback from attendees. [E116]

Annual Report on the Strategic Plan (Standards I.B, I.B.3, I.B.4, IV.B.2.b):

February 2014 - The Institutional Planning and Effectiveness Committee requested progress reports with supporting data on unit Action plans from responsible parties (e.g. administrators and committee co-chairs). [E70]

March/April 2014 – Responsible parties submitted progress reports, including corroborating quantitative and qualitative data and analyses, to the Institutional Planning and Effectiveness Committee. In addition, the Office of Research, Planning and Institutional Effectiveness provided qualitative and quantitative data and analysis of the metrics assigned to each District Objective. [E19]

March/April 2014 – The Institutional Planning and Effectiveness Committee reviewed, analyzed, and assessed the progress reports for effectiveness in moving the District toward the achievement of District Goals. Based on these assessments, the committee made recommendations regarding the Actions for 2014/15 and drafted the Annual Report on the Strategic Plan. [E73] [E74] [E75] Examples of these recommended Actions include:

- the creation of a task force to develop a plan and methodology for measuring the current use, and unmet needs, of academic support services;
- the implementation of a survey of students regarding the availability of counseling and library services;
- the cost-benefit analysis of the implementation of the Social Science prerequisite. [E19]


March 2014 - The Office of Research, Planning and Institutional Effectiveness gathered, organized, and loaded standardized quantitative data sets into the respective units’ program review files. [E86]

March/April 2014 – Units requested any additional quantitative and qualitative data needed for their program reviews from the Office of Research, Planning and Institutional Effectiveness. [E100] [E114]

August/September 2014 – The Institutional Program Review Committee developed an audit process for program review wherein the committee will include an evaluation
of the use of data by the units in creating their plans and evaluating their programs. [E88]

**Senate/Council/Committee Evaluations (I.B., I.B.3., I.B.6., III.D.4., IV.B.2.b.)**

- April 2014 – Senates’/Committees’/Councils’ End-Year Reports were completed. These reports include qualitative data and confirmation that scheduled meetings occurred, member’s attendance, and committee accomplishments. [E47]
- April 2014 – Senates’/Committees’/Councils’ Evaluation Surveys were administered and analyzed by the Office of Research, Planning and Institutional Effectiveness. These surveys included questions addressing operational efficiency and effectiveness. [E90]
- April/May 2014 – End of Year Reports and survey results and analyses were distributed to co-chairs of the Senates/Committees/Councils. Results were used to develop each group’s initiatives for the following year. [E49] [E79] [E80] [E92]
- August 2014 – District Year-End Committee Evaluation Reports were prepared by Academic Senate and District Governance Senate, posted online, and presented to the Board of Trustees. These reports utilize both quantitative and qualitative data and include recommendations for improvements in processes in the coming academic year. [E7] [E52]


- November 2013 – Above-base resource requests were prioritized by the Instructional Council, Student Services Council, Administrative Services, and President’s Office using both quantitative and qualitative data from Institutional Program Reviews and supplemental data supplied by the Office of Research, Planning and Institutional Effectiveness. [E36]
- January 2014 – The Budget Committee requested qualitative data in the form of technical and feasibility assessments of Above-base requests from the Technology Committee and the Facilities/Safety Council. [E26] [E35] [E68] [E111]
- February 2014 – The Budget Committee utilized a rubric to evaluate the quantitative and qualitative data received and prioritized Above-base resource requests. These prioritizations were then forwarded to District Governance Senate. [E27] [E28]
- March 2014 – District Governance Senate reviewed the prioritized lists and made recommendations to the Superintendent/President who, in turn, finalized the prioritization and presented the final report to the Board of Trustees.
- March/April 2014 – The Budget Committee, in conjunction with the Office of Research, Planning and Institutional Effectiveness, prepared and distributed a survey to the participants (those requesting funding and members of the Budget Committee) of the Above-base Resource Allocation Process and analyzed the data for future modifications of the process. [E25]

In addition to the items described above, the District has established several mechanisms to further increase the research capacity of the institution and to use data to guide effective planning, assessment, and decision-making. These efforts include:
Systematic Collection of Outcome Assessment Data (Standards I.B.1, II.A.2.e, II.A.2.f, II.B.4, IV.B.2.b)

- Academic units analyzed qualitative and quantitative assessment data collected during the first year of the three-year assessment cycle and prepared this analysis for inclusion in their Institutional Program Reviews. [E86]
- Non-academic units evaluated qualitative and quantitative service area outcome data collected from the first year assessments and prepared this analysis for inclusion in their Institutional Program Reviews. [E86]

Solutions and Innovations Workgroup (Standards I.B.2, I.B.3, I.B.6, II.A.1.a, II.A.1.c, II.A.2.e, II.A.2.f, II.B.4, III.A, IV.B.2.b) [E105]

- The Solutions and Innovations Workgroup was designed to increase the research capacity of the institution by coordinating District efforts in utilizing available data that can be used for research, assessment, and planning.
- The workgroup continued to assess the efficiency and effectiveness of the District’s COS Extended Information System (CEIS) in order to further decrease replication of requests and assure data integrity as it pertains to internal and external reporting.
- The workgroup identified and employed strategies that maintain data integrity which included standardization of operational definitions, coding procedures, and data accounting methods.
- The workgroup meets on an ongoing basis to identify issues with data use and reporting, analyze their implications, and generate solutions. These activities directly increase the District’s research capacity as well as improve efficiency and data validity.
- The workgroup’s regular meetings serve to coordinate the District’s efforts to employ data for research, assessment, and to support decision making.
- The workgroup developed and implemented the COS Data Reports Improvement Model which is a plan to improve quality and effective use of data.

Research Advisory Workgroup (Standards I.B.2, I.B.3, I.B.6, II.A.1.a, II.A.1.c, II.A.2.e, II.A.2.f, II.B.4, III.A, IV.B.2.b ) [E99] [E101] [E103]

- The Research Advisory Workgroup is comprised of faculty, staff, and administrators and serves to support and advise the Office of Research, Planning and Institutional Effectiveness in their efforts to increase the research capacity of the institution.
- The workgroup guided the Office of Research, Planning and Institutional Effectiveness in its efforts to provide the District with leadership and support for research, planning, and assessment services that advance data-driven decision-making and institutional effectiveness. For example, the group developed a framework for the development of the Districts three-year research agenda and directed the creation, establishment, and Federal registration of the District’s Institutional Review Board.
- Members of the workgroup identified tools and effective strategies for improving the use of data and analysis throughout the District. For example, the group has identified several topics related to the COS Extended Information System (CEIS) and developed an outline for workshops for training faculty, staff, and administrators.
regarding the extraction and analysis of data from the system. Training sessions are planned for the fall 2014 semester and will be facilitated by the workgroup’s co-chairs.

- The workgroup has developed the COS Data Needs Questionnaire, which was designed to collect information/feedback from internal constituencies about current uses and future needs of data. Data collected from the survey is being used to inform the development of future workshops/training, to provide a baseline for evaluating changes in the awareness of available sources of data and their analysis, and serve as gauge of the current levels of engagement with evaluation activities across the District.

**Student Equity Plan (Standards I.B, I.B.2, I.B.3, I.B.4, IV.B.2.b)** [E106]

- The plan’s parameters were reviewed with the Student Services Deans, the Vice President of Student Services, the Equity Committee, and the Office of Research, Planning and Institutional Effectiveness.
- Feedback from faculty members and others was incorporated in a draft plan. The Equity Committee reviewed the final draft and provided comments.
- Five success indicators were used to assess disproportionate impact: access, course completion, ESL and Basic Skills completion, degree and certificate completion, and transfer.
- To assess equity, the analyses used the following six disaggregated subgroups: gender, ethnicity, age, disability status, foster youth, and economically disadvantaged.

**Institutional Set Standards (Standards I.B; I.B.1-6; II.A; II.A.1.c; II.A.2.a,b,f,g,h,l; II.A.5; II.A.6; ER 10)** [E6] [E20] [E53]

- The following method for setting the COS minimum standards for student achievement and learning was developed:
  1. Review the most current and historical performance (multi-year/longitudinal data disaggregated by ethnicity and other demographic characteristics as appropriate);
  2. Generate multi-year averages for performance (5-8 years);
- Recommendations regarding the institution-set minimum standards for the metrics were determined based on District-wide discussion, input and feedback from the District’s governance groups, operational groups, and the Accreditation Community Advisory Committee.
- The Institutional Set Standards were reviewed and approved in accordance with the District’s governance process.

The District has satisfied 2012 Recommendation 3 by increasing the research capacity of the Institution. This increase in capacity has led to an expansion of the collection and utilization of data to guide institutional planning and resource allocation, program review and assessment, and decision-making for institutional effectiveness.
2013 Show Cause Report Actionable Improvement Plans

The actions taken to resolve 2012 Recommendation 3 also address the following Actionable Improvement Plans from the 2013 Show Cause Report: [E121]

Actionable Improvement Plan 1: The Superintendent/President, with members of the Implementation Task Force and the District Governance Senate, will ensure compliance with the timelines and processes in the College of the Sequoias 2013 Integrated Planning Manual for all institutional planning processes. (Standards I.A.3., I.B.2., III.D., III.D.1., II.D.1.a., III.D.4., IV.A.2., IV.A.2.a., IV.A.3., IV.A.5., IV.B.2.b.)

Actionable Improvement Plan 2: The Superintendent/President, with the District Governance Senate, will ensure compliance with the timelines and processes in the College of the Sequoias 2013 Integrated Planning Manual relating to the revision of the District Mission. (Standard I.A.4)

Actionable Improvement Plan 3: The Superintendent/President, with the Institutional Program Review Committee and the Academic Senate, will ensure the creation and implementation of the new Program Review template. Implementation of the revised institutional program review process will begin in spring 2014. (Standards I.A.4, IV.A.2.b)

Actionable Improvement Plan 5: The Superintendent/President, with the Budget Committee and the Implementation Task Force, will ensure compliance with the processes of budget development and Above-base resource allocation in the College of the Sequoias 2013 Resource Allocation Manual. (Standards I.B.4., III.D.1.b., III.D.1.d., III.D.4.)

Actionable Improvement Plan 6: The Outcome and Assessment Committee, the Institutional Planning and Effectiveness Committee, the Institutional Program Review Committee, the Budget Committee, and the Office of Academic Services will ensure outcomes assessments are tied to institutional improvement and resource allocation according to the College of the Sequoias 2013 Integrated Planning Manual, College of the Sequoias 2013 Resource Allocation Manual, and College of the Sequoias 2013 Governance and Decision-Making Manual. (Standards II.A.1.a., II.A.1.c.)

Actionable Improvement Plan 8: The Superintendent/President, with the Outcome and Assessment committee, will ensure compliance with the Three-Year Cycle for assessing all courses, programs, and institutional outcomes. (Standard II.A.2.e.)

Actionable Improvement Plan 9: Using the program review and resource allocation processes, the Superintendent/President will ensure that resource allocation decisions about student support services are based on data, and that special attention is given to ensuring that students have equitable access to services at all District locations and means of delivery. (Standard II.B.3.a.)

Actionable Improvement Plan 10: The Superintendent/President in collaboration with provosts, computer services staff, and math department faculty will ensure implementation of a system to provide Math Lab services to the Hanford Educational Center and Tulare College Center sites by November 2013. (Standards II.C.1., II.C.1.c.)
Actionable Improvement Plan 14: The District Governance Senate will ensure that the Senate/Committee/Council Evaluation in spring 2014 includes an assessment of representatives’ routine distribution of information to constituent groups. (Standard III.D.2.c.)

Actionable Improvement Plan 18: In order to institutionalize widespread institutional dialogue about assessment results, the Superintendent/President in collaboration with the Academic Senate will plan one Dialogue Day each semester into the academic calendar. (Standards II.A.2.a., II.A.2.e., II.A.2.f.)
2012 Recommendation 7 – Evaluation of Processes

In order to meet the Standards, the team recommends that the College develop and implement a systematic evaluation of its decision-making and budget development processes and use the results of those evaluations as a basis for improvement. (Standards III.D.1.a; III.D.1.d; III.D.2.d; III.D.3; IV.A.2, IV.A.5; IV.B.1.g; IV.B.2)

INTRODUCTION

As stated previously, in response to the Show Cause sanction, College of the Sequoias established an Accreditation Response Task Force. This Accreditation Response Task Force was charged with developing processes for integrated planning, governance and decision-making, resource allocation, and assuring that the District addressed all deficiencies in meeting the Accreditation Standards. Through a process of development, dialogue, and District-wide feedback, this group developed three manuals to guide the District as it moves forward. In August 2013, the District implemented the following three manuals:

- Governance and Decision-making Manual
- Integrated Planning Manual
- Resource Allocation Manual

The Governance and Decision-making Manual clearly defines the District’s governance groups (i.e. senates, committees, and councils), their charges, and reporting structures. In fall 2013, subsequent to the implementation of this manual, the District Governance Senate and Academic Senate approved an evaluation instrument for annual assessment of decision-making processes for all Senates, Committees, and Councils. This instrument was attached as an addendum to the Governance and Decision-making Manual online. [E9] [E41] [E64]

The Integrated Planning Manual and the Resource Allocation Manual include timelines and descriptions of the annual assessments of the decision-making processes. In addition, both of these manuals outline a procedure for undertaking a comprehensive three-year evaluation of these governance, planning, and decision making processes. The Resource Allocation Manual also directs the Budget Committee to perform an evaluation of the effectiveness of resource allocation and an evaluation of the resource allocation processes.

BACKGROUND

During their review of the District in fall 2013, the Show Cause Evaluation Team noted the following achievements:

- A new process and cycle of evaluation for decision-making and budget development were created.
- These processes include annual evaluations of governance senates, committees and councils, and a formal assessment of the entire decision-making processes every three years.
- The Budget Committee evaluates the resources allocation and budgeting processes annually.
• The District Governance Senate creates a consolidated year-end report on the annual evaluations of decision-making groups which will be posted online.

The 2013 Show Cause Evaluation Team Report concluded that “…COS should follow its new Model for Integrated Planning and budget development including evaluation and the use of these evaluations as a basis for improvement” (pg. 51). [E119]

**ACTIONS TAKEN TO RESOLVE 2012 RECOMMENDATION 7**

In order to develop and implement a systematic evaluation of its decision-making and budget development processes and use the results of those evaluations as a basis for improvement, the District completed the following actions since the Show Cause Evaluation Team visit in November 2013:

**Systematic Evaluation of Governance Processes (Standards IV.A.2, VI.A.5)**

- August/September 2013 – All governance groups (senates, committees, and councils), as a part of their initial meetings in fall 2013, conducted training on their functions, responsibilities, and expectations for participation. These standardized agenda items were distributed to all co-chairs to ensure uniform compliance. The governance groups also developed initiatives to be worked on throughout the year. The initiatives included compliance with the Standards on transparency: agendas, minutes, and documents were posted on the governance groups’ websites. [E8] [E34] [E50] [E61]
- January 2014 – Each governance group completed a mid-year report in which they provided updates on their initiatives. [E48]
- April 2014 – Members of senates, committees, and councils responded to a District Governance Survey. The survey was administered by the Office of Research, Planning and Institutional Effectiveness. This office compiled the results and provided analyses to the co-chairs of all groups. [E49] [E79] [E80] [E92] [E110]
- April 2014 – Each governance group completed a Year-End Report summarizing their accomplishments for the year. [E47]
- April/May 2014 – These Year-End Reports were shared with the committees and their respective senates. In reviewing their accomplishments for the year, each group was able to ascertain their effectiveness in completing initiatives; their ability to comply with their responsibilities as stipulated in the *Governance and Decision-making Manual*, the *Integrated Planning Manual* and/or the *Resource Allocation Manual*; and, identify any issues that must be addressed in the future. [E57] [E58] [E59]
- May-August 2014 – The senates, committees, and councils reviewed the findings of their evaluations. Each committee that reports to a senate provided that senate with an overview of the discussions and findings.
- August/September 2014 – The District Governance Senate and Academic Senate compiled the findings from all groups and created Year-end Evaluation Report which was presented to the District and the Board of Trustees. In some cases, the results of these evaluations led to initiatives for governance groups in 2014-2015. [E7] [E49] [E52] [E79] [E80] [E92]

- November 2013 – The Vice President of Administrative Services developed and implemented a budget tracking and control mechanism which documents all increases and decreases to the unrestricted general fund budget that occur during the fiscal year. [E15]
- February 2014 – The Vice President of Administrative Services formalized a systematic process for requests of any additional discretionary base budget funds as outlined in Administrative Procedure 3261. The requests were brought to the area vice president as requested via Institutional Program Review or the Strategic Plan. [E16]
- March/April 2014 – The Budget Committee, in conjunction with the Office of Research, Planning and Institutional Effectiveness, prepared and distributed a survey to the participants (those requesting funding and members of the Budget Committee) of the Above-base Resource Allocation Process and analyzed the data for future modifications of the process. [E25]
- May 2014 – The Budget Committee submitted its evaluation of the Above-base survey results to the District Governance Senate. This report included recommended changes to the Resource Allocation Manual to reflect the Committee’s findings. [E59]


- February 2014 - The Institutional Planning and Effectiveness Committee began requesting annual progress reports on unit Action plans from responsible parties (i.e. administrators and committee co-chairs). [E70]
- March/April 2014 – Responsible parties submitted progress reports, including corroborating quantitative and qualitative data and analyses, to the Institutional Planning and Effectiveness Committee. Based on a review of these reports, the Institutional Planning and Effectiveness Committee co-chairs drafted the College of the Sequoias Annual Report on the Strategic Plan. [E71]
- May 2014 – Based on an evaluation the past year’s operations, Senates, Committees, and Councils submitted proposed updates or changes to the Governance and Decision-making, Integrated Planning, and Resource Allocation manuals to the District Governance Senate. [E59]
- May/June 2014 – The draft of the College of the Sequoias Annual Report on the Strategic Plan was distributed for District-wide review and comment. The District Governance Senate gathered this feedback and prepared a final draft of the report which was submitted to the Superintendent/President and presented to the District’s Board of Trustees. [E19] [E59]
- August 2014 – The Annual Report on the Strategic Plan was distributed to internal and external constituencies.
- August/September 2014 – The Institutional Program Review Committee developed an audit process for program review wherein the committee will, among other things, evaluate the use of data by the units in creating their plans and evaluating their
programs. In addition, the results of the audit will be used to improve the Institutional Program Review templates, training, and processes. [E79] [E88]

The evaluations described above have led to changes and improvements in the operations of the governance groups and the processes they oversee (Standard IV.A.5). Some examples include:

**Senates:**

1. The District Governance Senate revised the *Governance and Decision-Making, Integrated Planning, and Resource Allocation* manuals. [E60]
2. The District Governance and Academic Senates revised the process for the establishment and alteration of Board Policies and Administrative Procedures. [E5] [E22] [E59]
3. The Academic Senate Instituted training in Robert’s Rules of Order and the 10 + 1 items under Academic Senate purview. [E11]
4. The Academic Senate drafted a new constitution and by-laws. [E11] [E115]

**Committees:**

1. The Budget Committee revised the Above-base resource allocation rubric and the Above-base Resource Allocation Process. [E29] [E30] [E37]
2. The Budget Committee instituted regular “best-practices” training on community college accounting conventions and standards. [E33]
3. The Institutional Planning and Effectiveness Committee revised the format for the reporting of Actions for the Annual Report on the Strategic Plan. [E74] [E75]
4. The Institutional Planning and Effectiveness Committee reformatted the meeting structure to encourage in-depth data analysis, editing, and creation of planning documents and to minimize informational reporting. [E73] [E74] [E75] [E76]
5. The Institutional Program Review Committee established regular joint meetings with the Budget Committee to help align processes. [E80]
6. The Institutional Program Review Committee developed an assessment rubric to evaluate the quality of responses within the Program Review templates. [E79] [E88]
7. The Curriculum Committee altered its meeting structure and operational procedures. [E49]

**Councils**

1. The Instructional Council revised the policies and procedures for selecting and ranking new faculty hires. [E12] [E91]
2. The Instructional Council reformatted its meeting structure to include an open forum for the discussion of emerging issues. [E90]
3. Deans’ Council changed its meeting structure to encourage greater depth of discussion and to allow deans to submit agenda items. [E51] [E109]

The District has satisfied 2012 Recommendation 7 by instituting and completing evaluations of its governance and decision-making processes and its resource allocation processes. The District has ensured sustainability by creating uniform processes which are applied to all governance groups at set intervals.
The actions taken to resolve 2012 Recommendation 7 also address the following Actionable Improvement Plans from the 2013 Show Cause Report:

**Actionable Improvement Plan 1:** The Superintendent/President, with members of the Implementation Task Force and the District Governance Senate, will ensure compliance with the timelines and processes in the *College of the Sequoias 2013 Integrated Planning Manual* for all institutional planning processes. (Standards I.A.3., I.B.2., III.D., III.D.1., II.D.1.a., III.D.4., IV.A.2., IV.A.2.a., IV.A.3., IV.A.5., IV.B.2.b.)

**Actionable Improvement Plan 5:** The Superintendent/President, with the Budget Committee and the Implementation Task Force, will ensure compliance with the processes of budget development and Above-base resource allocation in the *College of the Sequoias 2013 Resource Allocation Manual*. (Standards I.B.4., III.D.1.b., III.D.1.d., III.D.4.)

**Actionable Improvement Plan 11:** The Superintendent/President, with members of the Implementation Task Force and the District Governance Senate, will ensure compliance with roles and responsibilities placed upon each of the governance groups in the *College of the Sequoias 2013 Governance and Decision-making Manual*. (Standards III.D.1.d., IV.A.2., IV.A.2.a., IV.A.3., IV.A.5., IV.B.2.b.)

**Actionable Improvement Plan 14:** The District Governance Senate will ensure that the Senate/Committee/Council Evaluation in spring 2014 includes an assessment of representatives’ routine distribution of information to constituent groups. (Standard III.D.2.c.)

**Actionable Improvement Plan 17:** All committee co-chairs will provide training on each committee’s unique role in the integrated planning processes.
Evidence List

E1  2013-2014 Agenda Guide for Committees/Councils/Senates
E2  Annual Report on the Strategic Plan 2013
E3  2014-15 Draft Budget Assumptions
E5  Academic Senate Summit, Agenda and Notes, May 3, 2014
E6  Academic Senate, Agenda and Minutes, January 22, 2014
E7  Academic Senate, Agenda and Minutes, August 27, 2014
E8  Academic Senate, Agenda and Minutes, August 28, 2013
E9  Academic Senate, Agenda and Minutes, September 11, 2013
E10 Academic Senate, Agenda and Minutes, December 11, 2013
E11 Academic Senate, Retreat Agenda, September 5, 2014
E12 Administrative Procedure 3261, 3262, and 3263
E13 Administrative Services email regarding Above-base budgets, November 26, 2013
E14 Administrative services email regarding the 2014-15 Tentative Budget Allocation
E15 Administrative Services General Fund Budget Augmentation List
E16 Administrative Services, Memorandum requesting Base Budget Augmentation Requests, February 24, 2014
E17 Administrative Services, Memorandum to Area Managers asking for Budget Changes
E18 Administrative Services, Spring Budget Forums, Handouts, Sign-in Sheets and PowerPoint, March 26, 2014
E19 Annual Report on the Strategic Plan 2014
E20 Board of Trustees, Agenda and Minutes, February 10, 2014
E21 Board of Trustees, Agenda and Minutes, March 10, 2014
E22 Board of Trustees, Agenda and Minutes, June 9, 2014
E23 Board of Trustees, Agenda and Minutes, September 8, 2014
E24 Board of Trustees, Retreat Agenda, January 24, 2014
E25 Budget Committee survey and results on Above-base Budget Process
E26 Budget Committee, Agenda and Minutes, January 23, 2014
E27 Budget Committee, Agenda and Minutes, February 13, 2014
E28 Budget Committee, Agenda and Minutes, February 27, 2014
E29 Budget Committee, Agenda and Minutes, March 13, 2014
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E33 Budget Committee, Agenda and Minutes, May 8, 2014
E34 Budget Committee, Agenda and Minutes, August 22, 2013
E35 Budget Committee, Agenda and Minutes, December 5, 2013
E36 Budget Committee, Prioritized Lists for Above-base Resources, February 14, 2014
E37 Budget Committee, Revised Rubric for Above-base Funding
E38 College of the Sequoias 2013 Governance and Decision Making Manual
E40 College of the Sequoias 2013 Resource Allocation Manual
E41 College of the Sequoias 2014 Governance and Decision-making Manual
E44  College of the Sequoias Accreditation Website, College communications
E45  College of the Sequoias Institutional Planning Calendar
E46  College of the Sequoias, Tentative Budget, June 2014
E47  Committee/Council/Senate, Year End Reports, 2013-2014
E48  Committees/Councils/Senates, Mid-Year Reports, spring 2014
E49  Curriculum Committee, Agenda and Minutes, September 3, 2014
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E51  Deans' Council, Agenda and Minutes, June 4, 2014
E52  District Governance Senate Year-End Report 2013-14
E53  District Governance Senate, Agenda and Minutes, January 28, 2014
E54  District Governance Senate, Agenda and Minutes, February 25, 2014
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E65  District Governance Senate, Agenda and Minutes, December 10, 2013
E66  District Governance Senate, email to committee co-chairs regarding changes to the manuals
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