

District Services AUR Detail - Annual Update 2013

South Orange County Community College District

Chancellor's Office & Trustee Services

Unit Mission Statement: To serve Saddleback College, Irvine Valley College, ATEP, district services, and the board of trustees through leadership, advocacy and support that empowers them to accomplish their missions, visions, and strategic goals and strengthens the broader community.

Unit Overview: The chancellor is the chief executive officer of the district and supervises the college presidents, vice chancellors, associate vice chancellor, and the staff and operation of district services. The chancellor is responsible for the implementation of the district strategic plan, master plans, and board policies and regulations, and provides primary leadership in setting and communicating expectations of educational excellence and integrity throughout the district and assures support for the effective operation of the colleges. The chancellor acts as the liaison between the colleges and the governing board, and provides for the fair distribution of resources, control of expenditures, strategic institutional development, district-wide strategic planning, accreditation, and the long term financial stability of the district and colleges.

Unit Objective	Action Steps & Outcomes / Objective Resource Requests	Progress	Evaluation & Follow-up
Chancellor's Office & Trustee Services - Manage the District-wide Strategic Plan - Manage and monitor the District-wide Strategic Plan and ensure implementation. Objective Years: 2010-2011 2011-2012 2012-2013 2013-2014 Objective Status: Active	Action Step: Form, lead and monitor District-wide Planning Council and its subcommittee, the District Services Planning Committee. Type of Data: Focus Groups Outcome: Increased collaboration in district planning leading to increased awareness of decision-making process and rationale. Resource Request Type (tied to Action Step): Operation Support (on-going) Estimated Cost of Action Step: \$200 for refreshments Basic Aid Request (tied to Action Step): No	07/31/2013 - District-wide Planning Council meetings were held on September 7 and November 2, 2012 and on February 1 and April 5, 2013. The District Services Planning Committee continues to meet monthly. Progress Status: In Progress Reporting Year: 2012-2013 02/24/2012 - Two meetings were held on November 4 and February 10. A retreat is scheduled for May 30, 2012. Progress Status: Completed Reporting Year: 2011-2012	01/16/2013 - The District-wide Planning Council decided to schedule two meetings during each semester (four meetings total) and an annual retreat during the 2012-2013 academic year.
	Action Step: Coordinate and oversee District-wide Planning Council Retreat. Type of Data: Evidence of Implementation	07/31/2013 - The retreat was held on June 26, 2013 at the Mission Viejo Country Club. Progress Status: Completed Reporting Year:	

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	<p>Outcome: Progress of strategic plans will be reviewed and the planning documents will be updated as appropriate.</p> <p>Resource Request Type (tied to Action Step): Operation Support (on-going)</p> <p>Estimated Cost of Action Step: \$10,000 Retreat consultant/facilitator, facility rental fee, refreshments</p> <p>Basic Aid Request (tied to Action Step): No</p>	<p>2012-2013</p> <p>05/30/2012 - A retreat is scheduled for May 30, 2012. Time and location to be determined.</p> <p>Progress Status: Completed</p> <p>Reporting Year: 2011-2012</p>	<p>01/16/2013 - A retreat is scheduled for May 29, 2013, location TBD.</p> <hr/> <p>01/09/2013 - The retreat was held on May 30, 2012 at the Mission Viejo Country Club with over 35 administrators, faculty and staff in attendance.</p> <hr/>
	<p>Action Step: Direct, monitor and implement administrative unit reviews for all District Services units.</p> <p>Type of Data: Evaluation</p> <p>Outcome: Improved efficiencies, effectiveness, and services to the colleges, District Services, and the governing board.</p>	<p>01/16/2013 - Departments will submit updated AURs by January 18, 2013.</p> <p>Progress Status: In Progress</p> <p>Reporting Year: 2012-2013</p>	
		<p>03/02/2012 - A meeting was held on February 24 to review District Services AUR draft plans prior to submittal on March 2, 2012.</p> <p>Progress Status: Completed</p> <p>Reporting Year: 2011-2012</p>	
<p>Chancellor's Office & Trustee Services - Increase communication - Increase communication with the campus communities and the public</p> <p>Objective Years: 2010-2011 2011-2012 2012-2013 2013-2014</p> <p>Objective Status: Active</p>	<p>Action Step: Schedule and implement two college-wide forums a year at each college for the governing board and the chancellor to meet with the campus communities and the public.</p> <p>Type of Data: Participation Count</p> <p>Outcome: The college-wide forums will be well attended. This is the first year of conducting the meetings so the participation count will</p>	<p>07/31/2013 - College-wide forums were held at each college on November 7, 2012 and April 17, 2013.</p> <p>Progress Status: Completed</p> <p>Reporting Year: 2012-2013</p> <p>01/11/2012 - In November 2011 and November 2012 college-wide forums were conducted at each college campus; forums will be held in March or April 2013 at each college.</p>	<p>01/09/2013 - District/college-wide forums were held at each college on November 2, 2011.</p>

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	be used as baseline data.	Progress Status: Completed Reporting Year: 2011-2012	
	Action Step: Schedule and conduct a Chancellor's Opening Session each August during Flex Week. Type of Data: Participation Count Outcome: Increased awareness of district plans and progress.	07/31/2013 - Planning for the August 13, 2013 Chancellor's Opening Session will begin in late spring and plans have been finalized. Progress Status: Completed Reporting Year: 2012-2013	
	Basic Aid Request (tied to Action Step): No	03/01/2012 - Planning for the Chancellor's Opening Session on August 14, 2012 will begin in late spring. Progress Status: Completed Reporting Year: 2012-2013	01/16/2013 - The Chancellor's Opening Session was held on August 14, 2012 at Irvine Valley College.
		02/24/2012 - A Chancellor's Opening Session was held on August 16, 2011 during faculty flex week. Progress Status: Completed Reporting Year: 2011-2012	
	Action Step: Maintain SharePoint sites with current information. Type of Data: Documentation Outcome: Increased sense of transparency of district committee work and processes.	01/16/2013 - The District Services SharePoint Site Owners Task Force continues to meet regularly. The Chancellor's Office sites are updated regularly. Progress Status: In Progress Reporting Year: 2012-2013	01/17/2013 - Since the initial groundwork has been established, the task force has decided to meet once a month beginning in February 2013.
		02/24/2012 - District Services SharePoint Governance Task Force was formed in December 2011 and meets bi-weekly. Chancellor's Office sites are updated regularly after every meeting. Progress Status: In Progress	01/16/2013 - The task force was renamed the District Services SharePoint Site Owners Task Force. It developed branding and site standards and a governance manual. The Chancellor's Office

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		Reporting Year: 2011-2012	continues to make improvements to its sites.
	Action Step: Direct and monitor implementation of district-wide satisfaction survey with District Services departments and functions. Type of Data: Survey Outcome: Survey was conducted last May, evaluated, and a plan with action steps developed.	01/16/2013 - The Chancellor and the District Director of Research, Planning and Data Management will determine if the district-wide satisfaction survey should be implemented for April 2013. Progress Status: In Progress Reporting Year: 2012-2013	
		02/24/2012 - Satisfaction survey will be distributed via e-mail at the end of March or early April 2012. Progress Status: Completed Reporting Year: 2011-2012	
	Action Step: Direct and monitor implementation of district-wide climate survey. Type of Data: Survey Outcome: Data collected will be used to promote a district climate of mutual respect, collaboration and cooperation.	02/24/2012 - District-wide climate survey will be distributed via e-mail in the Fall 2012. Progress Status: Completed Reporting Year: 2012-2013	01/17/2013 - District-wide climate survey was conducted on October 24, 2012 via e-mail.
	Action Step: Work in consultation with District Director of Public Affairs to prepare and send district-wide "Chancellor's Perspective" electronic newsletters. Type of Data: Report Outcome: Better informed district community.	01/16/2013 - Chancellor's Perspective e-mails continue to be sent on a regular basis during the 2012-2013 reporting period. Progress Status: In Progress Reporting Year: 2012-2013	
		02/24/2012 - Chancellor's Perspectives have been sent to the district-wide community on January 13 and January 26, 2012. The newsletter has been	01/16/2013 - Chancellor's Perspectives e-mails were sent to the district-wide community on a

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		<p>well received and will continue to be sent on a regular basis.</p> <p>Progress Status: Completed</p> <p>Reporting Year: 2011-2012</p>	<p>regular basis during the remainder of the 2011-2012 academic year.</p> <hr/>
<p>Chancellor's Office & Trustee Services - Increase board knowledge - Increase board knowledge of district and educational responsibility.</p> <p>Objective Years: 2011-2012 2012-2013 2013-2014</p> <p>Objective Status: Active</p>	<p>Action Step: Encourage board members to attend conferences and legislative summits.</p> <p>Type of Data: Documentation</p> <p>Outcome: Increased knowledge and awareness of local, state, and federal issues related to the district and colleges.</p> <p>Basic Aid Request (tied to Action Step): No</p> <hr/> <p>Action Step: Send board members updates on major issues affecting their responsibilities.</p> <p>Type of Data: Report</p>	<p>07/31/2013 - Two board members attended a conference on college foundations in October 2012. The two new board members attended the CCLC's Effective Trusteeship January 25-27, 2013; the board president and clerk attended the CCLC Annual Legislative Conference January 27-28, 2013.</p> <p>Progress Status: Completed</p> <p>Reporting Year: 2012-2013</p> <hr/> <p>02/24/2012 - The board president along with the chancellor and district director of public affairs attended the ACCT National Legislative Summit on February 13-16, 2012 in Washington, D.C.</p> <p>The vice president of the board attended the OCSBA Page dinner meeting in the Fall 2011.</p> <p>At the December 2011 organizational meeting, the clerk of the board was appointed to serve on the Orange County Legislative Task Force as our district representative.</p> <p>Progress Status: Completed</p> <p>Reporting Year: 2011-2012</p> <hr/> <p>01/16/2013 - Chancellor continues to provide updates on a regular basis.</p> <p>Progress Status: In Progress</p> <p>Reporting Year:</p>	

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	<p>Outcome: Board members are able to make more informed decisions.</p>	<p>2012-2013 02/24/2012 - Chancellor continues to provide updates on a regular basis. Progress Status: Completed Reporting Year: 2011-2012</p>	
	<p>Action Step: Faculty and administrators from both colleges and district services will give presentations at board meetings on relevant topics. Type of Data: Report Outcome: Board members will have increased knowledge and understanding of topics. Basic Aid Request (tied to Action Step): No</p>	<p>07/31/2013 - Presentations on each of the state's Student Success Task Force recommendations began with the August 2012 board meeting and were completed at the May 2013 board meeting. Progress Status: Completed Reporting Year: 2012-2013</p>	<p>01/17/2013 - Presentations on the first four recommendations have been given; the remaining four will be given at the next few board meetings.</p> <hr/>
		<p>01/17/2013 - Presentations were given on the following topics: - College accountability/reporting - 2020 Vision report - ATEP planning and development - Educational and Facilities Master Plan - 5 year construction plan - Accreditation reports - District-wide Strategic Plan - Educational quality, academic programs, programs review, and SLOs - Student success plans, and ARCC report - ATEP-college program proposals - Reaffirming of college service area boundaries, ATEP area by college, and ATEP programs - Basic Aid allocation Progress Status: Completed Reporting Year: 2011-2012</p>	
<p>Chancellor's Office & Trustee Services - Assist board with self-evaluation - Assist the governing board with self-evaluation</p>	<p>Action Step: Schedule and coordinate retreats for the governing board.</p>	<p>07/31/2013 - The board's self-evaluation retreat was conducted on May 18, 2013 at the Mission</p>	

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<p>process.</p> <p>Objective Years: 2010-2011 2011-2012 2012-2013 2013-2014</p> <p>Objective Status: Active</p>	<p>Type of Data: Documentation</p> <p>Outcome: Board members will redefine their goals and recommit to them.</p> <p>Basic Aid Request (tied to Action Step): No</p>	<p>Viejo Country Club.</p> <p>Progress Status: Completed</p> <p>Reporting Year: 2012-2013</p> <hr/> <p>02/24/2012 - The board's self-evaluation will be held on Saturday, April 28, 2012 from 9 a.m. to 2 p.m. at the Mission Viejo Country Club. Public is invited to attend.</p> <p>Progress Status: Completed</p> <p>Reporting Year: 2011-2012</p>	<p>01/16/2013 - The self-evaluation retreat was held on April 28.</p> <hr/>
<p>Chancellor's Office & Trustee Services - Evaluate and improve use of technology - Continuously evaluate and improve use of technology.</p> <p>Objective Years: 2011-2012 2012-2013 2013-2014</p> <p>Objective Status: Active</p>	<p>Action Step: Evaluate and select software for board meeting agendas and minutes.</p> <p>Type of Data: Evaluation</p> <p>Outcome: Increased staff efficiency and higher quality, more user-friendly end product for viewing by the public.</p> <p>Resource Request Type (tied to Action Step): Operation Support (on-going)</p> <p>Estimated Cost of Action Step: \$22,000/yr - annual cost and maintenance support.</p> <p>Basic Aid Request (tied to Action Step): No</p>	<p>07/31/2013 - Installation of new board meeting software was completed in spring 2013.</p> <p>Progress Status: Completed</p> <p>Reporting Year: 2012-2013</p> <hr/> <p>02/24/2012 - Selected a vendor to upgrade our current board meeting voting system. Cost of upgrade approximately \$40,000.</p> <p>Progress Status: Completed</p> <p>Reporting Year: 2011-2012</p> <hr/> <p>02/01/2012 - Software company representative demonstrated product on February 1, 2012. Staff from District IT and college television department were also in attendance.</p> <p>Progress Status: Completed</p> <p>Reporting Year: 2011-2012</p> <hr/> <p>12/13/2011 - Researched vendors and products.</p> <p>Progress Status: Completed</p> <p>Reporting Year:</p>	

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		2011-2012	
	<p>Action Step: District and college staff will submit all board meeting agenda items electronically.</p> <p>Type of Data: Participation Count</p> <p>Outcome: The entire agenda process will become more efficient, reducing time and resources needed.</p>	<p>07/31/2013 - We continue to build the board agenda using Adobe Acrobat and have in addition begun loading the agenda through Granicus for viewing through the district's website and the iLegislate app for iPad users.</p> <p>Progress Status: Completed</p> <p>Reporting Year: 2012-2013</p>	
		<p>02/24/2012 - In the process of developing a new paperless system for building the board agenda.</p> <p>Progress Status: Completed</p> <p>Reporting Year: 2011-2012</p>	<p>01/09/2013 - In April 2012 we began building the board agenda using Adobe Acrobat.</p>