

Program Review User Guide

This document contains information regarding Program Reviews for 2018-19.

To access the Program Review website, go to <http://programreview.sbcc.edu> and log in with your Pipeline username and password.

If you experience problems logging in to the website, please contact Jordan Morris at jcmorris2@sbcc.edu for assistance.

Overview of Program Review

The program review process is a key element of integrated planning at SBCC and derives from the college's Mission and Core Principles, which undergird all aspects of the strategic planning process. Program review provides departments, programs, and units the opportunity to reflect on performance and needs, analyze data relevant to performance, and propose changes, thus linking to the ongoing cycle of assessment and improvement.

The program review process is on a three-year cycle, with annual updates for resource requests and analysis of progress towards goals. The Program Evaluation Committee (PEC) deals holistically with program planning through annual analysis of the program reviews submitted by departments and administrative units. The committee has two primary goals: first, to analyze program reviews to help support departments' and units' efforts to be strong and stable; and second, to cull and synthesize information from all program reviews in a report to the College Planning Council that is used to assess progress in advancing the Strategic Goals and Strategic Directions delineated in the college's Educational Master Plan.

Additionally, the annual resource requests from program review go through various consultation processes to be evaluated and ranked, with CPC making final recommendations for funding. Requests for full-time faculty are evaluated and ranked by the Academic Senate. Two Academic Senate subcommittees play key roles in ranking other resource requests from program review. Planning and Resources (P&R) ranks new and replacement equipment requests, while the Instructional Technology Committee (ITC) ranks hardware and software requests that originate within instructional programs and instructional support areas. These rankings are combined with the rankings from the President's Cabinet (PC) and the District Technology Committee (DTC) to form a final ranking. The Classified Staff Hiring Workgroup evaluates and ranks requests for staff. Facilities needs are evaluated and ranked by Facilities and Operations. All recommendations are forwarded to the College Planning Council for determination of the amount of funding. The Board of Trustees gives final approval for funding resource requests as part of the annual budget development process.

Established in 2017, the Budget Resource Allocation Committee (BRAC), also plays a role in the College's planning processes. BRAC is a sub-committee of CPC and reviews all department budgets. Membership includes two appointments from each governance group. All recommendations BRAC makes come to CPC for review. BRAC provides an opportunity to consider requests for additional funds and to look at budgets which have not been historically used, as well as other budget matters identified each year. BRAC is a public, open

governance body whose goal it is to calibrate actual needs to budgeting in a transparent way. The ultimate decision of budget approval or approval with amendments/revisions resides with the Superintendent/President.

For more information about BRAC, including the meeting schedule, see the detailed information on the Business Services website:

<http://www.sbcc.edu/businessservices/brac.php>

The full committee description and charge are outlined in the 19-page [*SBCC BRAC Guidelines*](#).

For specific resource requests relating to hardware, software, equipment, and other one-time requests, the following document delineates the program review timeline and provides information on processes for submitting various types of resource requests within the program review process.

Table of Contents

Program Review User Guide	1
Program Review Timeline for 2018-19	4
Program Review Resource Request Guidelines	6
Overview	6
Supply & Equipment Definitions	7
Technology Hardware & Software Requests	8
FAQs	10
Examples within Resource Request Categories	12
Assistance Available	14

Program Review Timeline for 2018-19

Date	Description
Wednesday - August 1, 2018	Program Review website opens. The Controller makes this request to IR in advance of the opening date and sends an email to all chairs/program managers as well as deans informing them when the site is open and including instructions on Program Review.
Friday – November 5, 2018	Formal requests for technology submitted to IT. (See page 6 of this guide for detailed procedures.)
Monday – November 6, 2018 by 8:00 AM	Deadline for Program Review submission (including work order submissions). There are 12+ weeks for data entry.
Week of November 26 - December 6, 2018	A) IR exports resource request to an Excel file. B) Controller, ITC and P&R Chairs clean up errors, omissions, and miscategorizations of resource requests in Excel file. C) CPC Ad Hoc Group conducts preliminary review of resource requests.
Friday – December 7, 2018	IR releases spreadsheets to P&R, ITC, DTC and PC.
Monday – January 14, 2019	Controller sends reminder to ITC Chair, P&R Chair, department chairs/directors, and program managers of outstanding approved resource requests for new and replacement hardware and software.
Friday – February 1, 2019	DTC ranks and records recommendations.
Friday – February 22, 2019	ITC ranks and submits recommendations to Academic Senate.
Monday – February 25, 2019	VP of IT and dean responsible for technology send notification to submit technology queries for the 2017-18 academic year. (Note: This allows faculty/staff time to try out new technology before submitting formal requests by September 15 the following academic year.)
Tuesday – March 12, 2019	P&R ranks and submits recommendations to Academic Senate.
Wednesday – March 13, 2019	Academic Senate ranks and records recommendations.
Monday – March 18, 2019	PC ranks and records recommendations.
Tuesday – March 19, 2019	Ranked facilities requests are presented to CPC by the Director of Facilities.
Tuesday – April 2, 2019	CPC First Reading of recommendations from Academic Senate, DTC, and PC.
Tuesday – April 16, 2019	CPC Second Reading of recommendations from Academic Senate, DTC, and PC.
Tuesday – April 16, 2019	CPC First Reading of revised Program Review User Guide submitted by the Controller.

Tuesday – May 7, 2019	CPC Second Reading of revised Program Review User Guide submitted by the Controller.
Tuesday -- May 7, 2019	Program Evaluation Committee (PEC) submits PEC Annual Report, including recommendations for Program Review changes, to CPC. Submitted to CPC by Faculty Co-Chair of PEC.
Friday -- May 10, 2018 or before	Program Review Template update meeting. Attended by: Controller, P&R and ITC chairs, IR department, and dean liaison to PEC. Meeting is called by the Faculty Co-Chair of PEC.
Monday – July 8, 2019	Controller releases budget codes to ITC Chair, P&R Chair, department chairs/directors, and program managers.
Mid-May, 2019	Deadline to submit purchase requisitions for approved program review resource requests.
End of June, 2019	Last day to use allocated funds.

Program Review Resource Request Guidelines

Only requests that are essential to the operation of the department or program should be included. Items may include elements necessary in order to implement a change or expansion of programs that will serve documented student needs.

Unlike in previous years when areas were asked to rank items 1, 2, or 3, the ranking column has been deleted. Please only include items that are truly needed in the following academic year. Items that would not be appropriate to include in this resource request cycle are things it would be nice to have but not essential, items that will be needed several years later but not next year, and items not linked to a unified planning process supported by the department or program.

Overview

1. Each unit goal/project should ideally link to one or more of SBCC's Strategic Directions and Goals, which are part of the Educational Master Plan.
2. The minimum resource request amount is **\$1,000**. This minimum limit applies to single items or like aggregated items. If multiple items of one type are requested, i.e., 10 web cams at \$100 each=\$1,000, that would be listed in the Program Review as one item. Lower cost items should be purchased with the department's supplies budget.
3. All Facilities requests, whether new or maintenance, are to be entered as a work order. (See link posted on the Facilities template in Program Review or go directly to <http://facilities.sbcc.edu>). All Facilities requests will be ranked by Facilities and presented to CPC. If the Facilities request is to be considered for this Program Review cycle, it must be **entered by the Program Review deadline**.
4. For Educational Programs, the Planning & Resources and Instructional Technologies Committees request that department chairs consult with their dean and/or their representatives on P&R and ITC before the Program Review deadline in order to ensure that their resource requests are entered on the correct template. **Resource requests that are not entered on the correct template may not be considered for funding.**
5. For classroom furniture:
 - a. For broken or missing furniture, open a facilities work order or consult with your area dean/manager. These requests should **not** appear in Program Review. The dean/manager will seek final approval from the EVP of Educational Programs for action within the current fiscal year.
 - b. A request for replacement or upgrade of an entire set of classroom furniture should not appear in Program Review. A classroom furniture replacement procedure has been established and Purchasing oversees this process. See the SBCC Purchasing website for more information on these processes. <http://www.sbcc.edu/purchasing/>
6. For classroom technology items, consulting with the Faculty Resource Center is critical to determine the appropriate classroom technology support and infrastructure needs. If faculty want to pilot emerging technology prior to requesting it in Program Review, pilot program can be set up through the Faculty Resource Center for further testing and training.
7. For computer labs at Wake and Schott Centers that are associated primarily with one program (Ex.

Professional Development Center), those requests go through the dean of those programs. For those labs shared by multiple areas, requests should go through the EVP for Educational Programs. The EVP will include these requests in the Program Review for the Office of Educational Programs.

8. When you enter a resource request, you will be prompted to check whether the item is **new** or **replacement**.
9. Any purchases made from existing accounts, such as the department's supplies budget, should **not** be submitted on the Program Review resource requests templates. For increases to non labor budgets, such as supplies, consult with your area dean/manager.
10. All new resources needed for the coming fiscal year must appear on the Program Review resource request templates, or they will not be considered for funding.
11. It is extremely important that the "Approximate Cost" estimate box on the Program Review template be accurate. Be certain to include taxes and shipping in the estimate total. **Items without a cost estimate will not be ranked.**
12. Cross-departmental/divisional requests should be made **only once**. However, the requesting program should include all the parties that benefit as part of the rationale for the request.
13. When considering which resource requests to include, ask for resources you REALLY need and provide sufficient rationale to support each request.
14. Please note that any items entered in the "Other Needs" tab are not ranked or funded, with the exception of Non-Teaching Compensation requests. The purpose of submitting items on the "Other Needs" tab is to give the college a sense of unmet needs across a range of areas for planning.
15. Once program review requests have been submitted and the relevant committees are reviewing the requests in fall semester, the appropriate ITC and P&R representatives should be consulted and informed about the requested items in order for them to present the items fully to each committee.

Supply & Equipment Definitions

Definition of a supply: Supplies are items that are expendable and quickly consumed or easily broken, damaged, or lost. (source: CCC BAM)

An item is considered a supply if it meets one or more of the following criteria:

1. The item is perishable.
2. The item needs to be replaced every year or is replaced on a rotational basis every several years.
3. The item can be low cost or high cost for a single item.
4. When purchasing large quantities of the same item, the cost may be low for the single item, but high for the total cost of purchasing large quantities at once.

Definition of equipment: Equipment is tangible property with a useful life of more than one year. (source: CCC BAM)

Equipment differs from supplies in that equipment can be capitalized (depreciated) and does not need to be replaced on a frequent basis.

Process for obtaining additional supplies funds: Requests to pay for supplies over budget need to be made by the department chair or program manager and then approved by the area vice president. Funds to pay for supplies will be transferred to a cost center from another cost center, within the vice president's areas.

Technology Hardware & Software Requests

For Technology Requests Under \$5,000

Please review the current computer standards before making requests, and use the dollar amounts listed in the document for the computer items you request:

https://docs.google.com/a/pipeline.sbcc.edu/document/d/1Plmf_GrzMqJCW6bc9SleB96Mk0CswOlfiHEqK0NJggk/edit

For Technology Requests Over \$5,000

Prior to submitting information in the Program Review template for technology (e.g. software, computers, mobile devices, servers, etc.) please follow the instructions in the IT Project Request Form:

<https://docs.google.com/a/pipeline.sbcc.edu/document/d/1VytvUHzp5V8fVP5hvv1J4haCq3uwzC/pH-JOKkAG2tM/edit?usp=sharing>

Fill out the **IT Project Request Form** linked therein by September 15. The IT Project Request Form is required for projects needing more than 5 hours of labor OR costing more than \$5,000 to complete. **Such requests for technology that are not accompanied by the completed form will not be ranked.**

For existing computers and other technology related equipment (including classrooms and labs), first confirm if they are on the “refresh” cycle, by logging in to <http://helpdesk.sbcc.edu>, and **select “Asset Search”** from the drop down menu. If the existing computer on the list is marked “YES” in the “REFRESH” column, it will be replaced based on the current replacement cycle (presently 5 years).

If your computer need is not eligible to be purchased from equipment fund (i.e., “refresh”), then it needs to be put in the Program Review as a new resource request because this becomes an ongoing expense on a non-routine basis.

In order to help faculty plan for new classroom technologies, they will need to communicate with David Wong in order to determine the need for piloting or training for the coming year. It is essential for David Wong/FRC and the instructor to evaluate and test the proposed technology before an official resource request is submitted. Departments that want to test or pilot educational technology should contact David the prior spring semester so that they have time during the summer to experiment with the technology before making a final decision about what request to submit. The September 15 deadline listed on the timeline is primarily to set up training once requesters have decided what they want to purchase.

If you have questions about your technology request, please contact the appropriate IT Director:

Area	<u>Educational Programs</u>	<u>Administrative Units</u>	<u>Either</u>
Type of Technology	Instructional software, mobile devices, computer labs, lab expansions or reconfigurations	Non-instructional software, hardware, wireless, or servers	New computers, mobile devices not in a lab setting, or multimedia technology
Contact Person	David Wong, Director of Faculty Resource Center Wong@sbcc.edu Jason Walker, Director of Academic Technology Services WalkerJ@sbcc.edu	Dan Watkins, Director of IT Infrastructure and Systems Daniel.watkins@sbcc.edu	David Wong, Director of Faculty Resource Center Wong@sbcc.edu Jim Clark, Director of User Services Jim.Clark@sbcc.edu

Full-time Classified Staffing and Short-Term Employee Requests

Use the drop down menu on the online template to designate whether the request is for full-time classified staff or short-term employee positions. The online template link is below:

<http://goo.gl/forms/mcxVq92CSc>

Use the following criteria for full-time classified staff when filling out the template:

1. Justification
 - o Previous staffing levels
 - o Have job requirements changed?
 - o New assignments/ new activities
2. Any conversion of hourly money to a permanent position is positive
3. Use program review for position requests *unless there are extenuating circumstances*
4. Alignment with college goals and Education Master Plan

Only under limited conditions should short-term employee position requests be made.

Definition: "Short-term employee," means any person who is employed to perform a service for the district, upon the completion of which, the service required or similar services will not be extended or needed on a continuing basis. Before employing a short-term employee, the governing board, at a regularly scheduled board meeting, shall specify the service required to be performed by the employee pursuant to the definition of "classification" in subdivision (a) of Section 88001, and shall certify the ending date of the service. The ending date may be shortened or extended by the governing board, but shall not extend beyond 75 percent of a school year. *Education Code, section 88003.*

*Full-time classified management position requests are not submitted through the classified staffing process. Requests are submitted to area VP/EVP for consideration.

Increases in monthly assignments may also be made using this form: for example, a full time position changing from a 10-month to a 12-month assignment or a 60% position changing to a 100% position.

Full-time Faculty Requests

All requests for full-time faculty should be entered in the "Faculty Needs" tab. In addition, the complete justification for this need must be submitted in response to the call for submissions which the EVP of Educational Programs will send out at the beginning of fall semester.

FAQs

1. **If my program review resource request was approved, can I use the money to purchase a different item of similar value?**

No. Only the exact items requested and approved may be purchased. For example, if the program's request to purchase a computer was approved, a copy machine may not be purchased with those funds.

2. **Do requests for replacement faculty positions need to be entered on the "Faculty Needs" template in Program Review?**

Yes. Even though they are not new, we need to tie faculty hiring explicitly to Program Review (as per our accreditation evaluation report and recommendation received). Your requests for both replacement and new faculty positions will follow the Academic Senate procedure.

3. **What do I need to do to augment, IF ABSOLUTELY CRITICAL, supplies or other budgets?**

BRAC reviews departmental budgets annually in April. Consult with your area dean/manager prior to March if there is a critical need for an augmentation to the supplies budget. These requests should not appear in Program Review.

4. **Can I request items which cost less than \$1,000?**

No. These low-cost items should be purchased out of your existing supplies budget, which was updated during the 2012/2013 and 2013/2014 budget process. However, please consult with your area dean/manager.

5. **How do I replace a computer if I purchased a computer using grant funds, or my department has a computer that is not eligible to be replaced with refresh funds?**

A replacement hardware request needs to be submitted through Program Review.

6. **If a department is requesting a new (not replacement) faculty position (under "Faculty Needs"), should the department also automatically request a computer for the new person (under "Hardware") and a desk and other office furniture (under "Equipment")?**

No. Any approved position request automatically includes the required equipment.

7. **Do I need to submit software renewal fees if they are currently being paid for by another funding source (such as grant funds, lottery funds, or department funds)?**

No.

8. **If my resource request is approved, and the current estimate is 10% higher than my originally approved estimate, what happens?**

Your request will need to be resubmitted in the following year's program review. You cannot spend more than 10% over the originally approved amount.

9. **If my resource request is approved, do I have to use the funds that same fiscal year?**

Yes. The Controller sends out the list of approved items and their corresponding budget codes in July of each year, and those funds must be used in the fiscal year that they were allocated. The fiscal year extends from July 1 to June 30. However, in extenuating circumstances, a request for carryover may be made to the Controller.

- 10. What if I need to request services, consulting, marketing, support, training or other resource requests that do not fit within the existing program review tabs?**

You may enter these requests on the "Other Needs" tab. These items are not ranked or funded. See FAQ #12.

- 11. What about requests for changes to Non-Teaching Compensation, such as department chair stipends? Where should I enter that?**

Enter these requests under the "Other Needs" tab. Such requests should be based on a change in job duties that warrants review of the stipend amount.

- 12. Are items submitted on the "Other Needs" tab ranked and funded?**

No, they are not ranked or funded, with the exception of Non-Teaching Compensation requests. The purpose of submitting items on the "Other Needs" tab is to give the college a sense of unmet needs across a range of areas for planning.

- 13. Where do I find the budget numbers and the amounts approved for program review requests that were funded?**

The Controller sends out the list of approved items and amounts by mid-July each year. These budget codes are emailed to the ITC Chair, P&R Chair, all department chairs/directors, and all managers.

Examples within Resource Request Categories

The following lists provide examples of items that might typically fall within each category. On the right-hand side are examples of things that would not fit.

Equipment

Equipment is defined as items that are used within a space but are detached from the structure and do not require installation (moving only).

<u>Examples of Items that Fit in the Equipment</u>	<u>Unsuitable Items</u>
<u>Category</u>	
- 6 food processors - Tire changer with wheel lift - Dissection table - Audiometers - Document cameras for classrooms - Camera or lens - Video camera - Construction tool upgrade, both hand and power tools (but check "replacement" rather than "new" when entering it on the template) - A set of compound microscopes (even if connected to a computer, as long as the computer is dedicated to the microscopes alone)	- Changes to the structure of a room, such as adding or removing a wall (belongs on the Facilities template in Program Review) - Carpeting or other flooring (if routine maintenance, submit to Facilities via an online work order) - A new or replacement computer or server (a new request belongs on the hardware templates; a replacement is part of the refresh cycle and does not need to be entered in Program Review) - Components for a bunkered classroom

Q: Do classroom cabinets, etc. fit in this category?

Yes. Again, you will be asked to note if the request is for a new or non-annual replacement item. One exception: if the cabinets will be installed permanently, they belong on your Facilities template. If the cabinets are free-standing, then they would be categorized as equipment.

Facilities

Facilities requests are defined as items that affect the structure and accessories of the building. These may include construction requests (such as built-in cabinets) or requests for extra space (such as a new room or lab). All Facilities requests should be submitted as a work order. Facilities will rank the requests.

Hardware

Hardware refers to items that connect to a network, go on a refresh cycle, or require substantial IT support.

<u>Examples of Items that Fit in the Technology Hardware Category</u>	<u>Unsuitable Items</u>
- New computers for a lab (not replacements, which are on the refresh cycle) - A computer, a projector, and housing for bunkered unit in classroom - New servers - Peripherals needed for computers (for example, a web camera or flip camera) - Tablets/Portable Devices (individually or in aggregate when over \$1,000 for total request) - Printers (individually or in aggregate when over \$1,000 for total request)	- Software (list on software template, of course) - Licensing fees (if new, list on software template; if renewal, you do not need to list them—generally they will be funded from lottery monies) - Furniture (unless it is for a new computer—see question below this list) - Cameras and lenses - Video cameras - Microscopes that come with computers, packaged as one system by the vendor (these would go on the equipment template)

Q: The hardware may include only a computer, but a room may need a console or piece of furniture to house the computer. Is the console listed under technology hardware or listed separately under equipment?

Even though the furniture is not hardware, list it together with the hardware as the furniture is needed to use the hardware. In addition, do not list this same new furniture for the new hardware on your equipment template.

Software

<u>Examples of Items that Fit in the Technology Software Category</u>	<u>Unsuitable Items</u>
- New software that cannot be purchased out of your supplies budget - Adobe Acrobat for an entire lab (as opposed to one user)	- License renewal fees - Single-use, inexpensive software that will not require license renewal fees (if it can be purchased out of your supplies budget)

Assistance Available

If you have any questions or concerns, please contact:

Instructional Program Review

- Katie Laris -- Chair of Planning and Resources, LarisK@sbcc.edu
- Laurie Vasquez -- Chair of Instructional Technology Committee, vasquez@sbcc.edu

Non-instructional Program Review

- James Zavas - Controller, Fiscal Services, jdzavas@sbcc.edu

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