

# Strategic Planning Results

Sorted By: Planning Unit

Planning Year: 2011-2012

Unit Code:	Planning Unit:	Unit Manager
00215	Accounting Services	Polanco, Guillermo

## Unit Purpose

There is no Unit Purpose to Display

## Unit Goals

There are no Unit Goals to Display

Obj ID	Objective	Objective Purpose	Objective Status
1405	Paperless Environment Project: Extender	Operational Outcome	Implementing

## Objective Description

Once fully implemented, the Extender portion of the paperless environment project will provide all constituents with more efficient and secured access to documentation associated with financial services operations. This will decrease our need for storage space and promote efficiency in retrieving financial records.

## Institutional Goals

A. Allocate financial resources aligned with College priorities

C. Engage faculty and staff to create a comprehensive plan that will provide the necessary technolog

## Objective Types

No Objective Types to Display

## Planning Priorities

No Planning Priorities to Display

## Tasks

Due Date	Status	Priority	Task	Budget Amount
11/01/2011	In Progress	High	Ensure that Banner has ordered and provided each team member a scanner.	\$0
11/18/2011	In Progress	High	Ensure that proper training of equipment and software is carried out.	\$0
11/25/2011	In Progress	High	Prepare tests from training manuals.	\$0
11/28/2011	In Progress	High	Test all staff assigned a scanner and trained on the Extender process.	\$0

## Assessment Measures

Date	Assessment Measure
07/14/2011	Extender Implementation Checklist
07/14/2011	Results of manual developed, training test instrument

## Intended Results

Date	Intended Results
07/14/2011	By 11/30/2011, all aspects of Extender will implemented in financial services.
07/14/2011	By 11/30/2011, all required staff will be functional in the use of Extender, as demonstrated by module test developed from training manuals, all participants score by 75% or better on all relevant modules.
07/14/2011	By May 2012, Diminsh the amount of time that it takes to gather and respond to audit and public records requests.

**Status Reports**

Report Date	Status Report
2/1/2012	All remaining staff, with the exception of Accounts Payable, have been trained and are now using the scanners to upload the documents pertinent to their areas. Due to the planned retirement of both A/P clerks that areas transition has been postponed to July 1, 2012 as new employees are trained for both positions.
10/17/2011	All equipment has been deployed to Staff, including, the Accounting Manager, and the Director of Accounting Services. The purchasing staff has been trained and have commenced scanning their documents for this fiscal year. The Accounts Payable Staff, Senior Accountant, Accounting Manager, and Director of Accounting Services will be trained in the next week or two in order scan their related documents, e.g. invoices, journal vouchers, etc.

**Actual Results**

There are no Actual Results to Display

**Use of Results**

There are no Use of Results to Display

**Gap Analysis**

There are no Gap Analyses Results to Display

**SWOT Analysis**

There are no SWOT Analyses Results to Display

**Units Impacted**

There are no Units Impacted to Display

**Associated Standards**

There are no Associated Standards to Display

**Associated Outcomes**

Obj ID	Objective	Objective Purpose	Objective Status
1406	Purchasing Card Program (PCard)	Operational Outcome	Implementing

**Objective Description**

When implemented by Financial Services the Purchasing Card Program will enable employees and departments to engage in routine business on behalf of the College with minimal out of pocket expenses while maximizing the value provided to the College.

Institutional Goals	Objective Types	Planning Priorities
A. Allocate financial resources aligned with College priorities	No Objective Types to Display	No Planning Priorities to Display
C. Engage faculty and staff to create a comprehensive plan that will provide the necessary technolog		

**Tasks**

Due Date	Status	Priority	Task	Budget Amount
09/30/2011	In Progress	High	Ensure contract has been reviewed by legal and signed by the VP, Financial Services.	\$0
09/15/2011	In Progress	High	Ensure PCard module is integrated with Banner.	\$0
09/22/2011	In Progress	High	Determine departments and users to whom a pcard will be issued.	\$0
09/29/2011	In Progress	High	Test that all expenditures are being tracked and limited by type/category in the pcard module.	\$0

#### Assessment Measures

Date	Assessment Measure
07/14/2011	Reimbursement of employees per Direct Deposit files.
07/14/2011	Rebate program payments to the College

#### Intended Results

Date	Intended Results
07/14/2011	By 6/30/2012, out of pocket expenses will decrease by 75% over the previous year for those employees participating in the program (as measured by employee reimbursements-should be decreasing)
07/14/2011	By 6/30/2012, the College will increase net rebate revenues by 50% (as measured by Bank Reports or booked revenue)

#### Status Reports

Report Date	Status Report
2/1/2012	Due to the retirement notices for the entire Accounts Payable department including the Travel Specialist who would oversee the PCard module as it works in tandem with the Travel Module we will be postponing the implementation of this program to Fiscal Year 2013.
10/19/2011	Started preparing for the PCard program by reviewing case studies regarding PCards and their efficacy. Epayables may be another option for the automation of the process and would also result in rebates to the College. The PCard program though would complement the current Travel and Expense module being implemented. The project time table will be layed out by December 15, 2011.

#### Actual Results

There are no Actual Results to Display

#### Use of Results

There are no Use of Results to Display

#### Gap Analysis

There are no Gap Analyses Results to Display

#### SWOT Analysis

There are no SWOT Analyses Results to Display

#### Units Impacted

There are no Units Impacted to Display

#### Associated Standards

There are no Associated Standards to Display

#### Associated Outcomes

Obj ID	Objective	Objective Purpose	Objective Status
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**Objective Description**

Once the marketing effort is implemented, the Office of Financial Services will facilitate increasing participation by students in the College's outsourced services. This will improve students capacities to pay their expenses and receive financial refunds in a timely manner

**Institutional Goals**

A. Allocate financial resources aligned with College priorities

A. Develop a shared understanding, application and accountability of learning-centered culture

C. Engage faculty and staff to create a comprehensive plan that will provide the necessary technolog

**Objective Types**

No Objective Types to Display

**Planning Priorities**

No Planning Priorities to Display

**Tasks**

Due Date	Status	Priority	Task
08/15/2011	In Progress	High	Ensure that TIP and HigherOne advertising materials have been distributed to the students, via email, edisonstatements, website, hard copy, etc. and are being included in Orientation materials.
09/30/2011	In Progress	High	Request that Nelnet (TIP) and HigherOne create the necessary surveys that will be carried out every semester.

**Assessment Measures**

Date	Assessment Measure
02/01/2012	HigherOne program activation counts and dates of activation
07/14/2011	Counts of TIP program contracts (percentage change over previous year)
07/14/2011	Results of financial services survey (in collaboration with Nelnet)

**Intended Results**

Date	Intended Results
02/01/2012	By the end of FY 2011-2012, we will establish baseline student satisfaction information with outsourced services (developed through Nelnet survey)
07/14/2011	By the end of FY 2011-12, students (without financial aid) participation in TIP will increase by 5% over the FY 2010-11
07/14/2011	By 6/30/2012, the College will increase the percentage of students activating their HigherOne cards within 30 days by 5%.

**Status Reports**

Report Date	Status Report
1/31/2012	Nelnet and HigherOne have created the necessary surveys that will assist in assessing the final outcome.
1/31/2012	The pertinent reports have been identified and obtained from Nelnet and Higher to quantify the goals to reach the outcome..
1/31/2012	Advertising material have been ordered and distributed to students via email, edisonstatements, website, and hard copy.

**Actual Results**

There are no Actual Results to Display

**Use of Results**

There are no Use of Results to Display

**Gap Analysis**

There are no Gap Analyses Results to Display

**SWOT Analysis**

There are no SWOT Analyses Results to Display

**Units Impacted**

There are no Units Impacted to Display

**Associated Standards**

There are no Associated Standards to Display

**Associated Outcomes**


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Obj ID	Objective	Objective Purpose	Objective Status
1430	Paperless Office Environment: Travel Expenses	Operational Outcome	Approved

**Objective Description**

To facilitate continuous improvement in the areas of accounts payable and receivable, the paperless environment objective from 2010-2011 remains an active concern for the 2011-2012 year (See Obj. ID 946). By the end of this planning cycle, the travel and expense projects will be completed. This will result in efficiencies gained via paperless processing.

Institutional Goals	Objective Types	Planning Priorities
No Institutional Goals to Display	No Objective Types to Display	No Planning Priorities to Display

**Tasks**

There are no Tasks to Display

**Assessment Measures**

Date	Assessment Measure
07/26/2011	Time and effort necessary to carry out tasks in the newly implemented paperless process.
07/26/2011	End user satisfaction with the new paperless process
07/26/2011	Economy and efficiency gained with the new process.

**Intended Results**

Date	Intended Results
07/26/2011	By the end of the 2011-2012 fiscal-year, all processes required for travel authorizations and travel expenses will be managed without paper forms
07/26/2011	By the end of the 2011-2012 fiscal-year, paperless processes should decrease the time and effort required to complete routine tasks
07/26/2011	By the end of the 2011-2012 fiscal-year, satisfaction (students and employees) with for students and employees in other departments should increase.

**Status Reports**

Report Date	Status Report
2/1/2012	The majority of the Lee Campus personnel responsible for the travel of others have been trained. The Charlotte and Collier Campus personnel will be trained on the week of February 20th. The HendryGlades person will attend the Charlotte training. The Travel Specialist is compiling a list of all employees that complete their own travel in order to set up a training session for them.
10/17/2011	The initial training was interrupted as several issues arose with the module. The supporting documents scanned were not appearing in Banner. The item was allowed to route even if it did not have enough budget. The kinks have been worked out and training will resume in order to begin rolling out the program within the next four to six weeks.

**Actual Results**

There are no Actual Results to Display

**Use of Results**

There are no Use of Results to Display

**Gap Analysis**

There are no Gap Analyses Results to Display

**SWOT Analysis**

There are no SWOT Analyses Results to Display

**Units Impacted**

There are no Units Impacted to Display

**Associated Standards**

There are no Associated Standards to Display

**Associated Outcomes**

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<b>Unit Code:</b>	<b>Planning Unit:</b>	<b>Unit Manager</b>
00217	Auxiliary Services	Pultro, Judy

### Unit Purpose

There is no Unit Purpose to Display

### Unit Goals

There are no Unit Goals to Display

Obj ID	Objective	Objective Purpose	Objective Status
1398	Connect Card-Meal Plan Initiative	Operational Outcome	Implementing

### Objective Description

Once implemented completely, auxiliary services in collaboration with Enterprise Application Services will facilitate the effective and automated meal tracking and financial accounting of the Collegiate High School Lunch Program.

Institutional Goals	Objective Types	Planning Priorities
No Institutional Goals to Display	No Objective Types to Display	No Planning Priorities to Display

Tasks				
Due Date	Status	Priority	Task	Budget Amount
08/05/2011	Complete	High	Attend Lee ECHS Open Houses to provide Spartan Cards to all high school students.	\$0
08/30/2011	Complete	High	Develop weekly and monthly financial reports showing student purchased lunches.	\$0
11/30/2011	Incomplete	High	Create a survey to send out to students and parents to gather feedback on the use of the one cards for meal purchasing.	\$0
12/09/2011	Incomplete	High	Survey students and parents.	\$0

### Assessment Measures

Date	Assessment Measure
07/12/2011	CBord reports of active card users
07/12/2011	Student/Parent Satisfaction Survey Results

### Intended Results

Date	Intended Results
07/12/2011	By the August 2011, all (100%) Collegiate High School students will be provided with and have used a One card.
07/12/2011	By December 2011, 85% of surveyed parents and students will indicate satisfied to very satisfied on items associated with the One card and meal purchasing

### Status Reports

Report Date	Status Report
1/16/2012	<p>100% of all current ECHS students have been provided a one card. The majority of carding was completed at ECHS orientations or during the first week of classes. Students enrolling at other points of the academic year are escorted by ECHS staff to the College carding offices to obtain their one card.</p> <p>Daily reports are emailed to ECHS staff which include daily transaction data, patron balance, and summary of meals served data. Monthly, a report is sent to the ECHS staff that provides total monthly transactions which are used for claim reimbursement.</p> <p>A delay in online deposits for the parents and the addition of a plan to include "email alerts" of low patron balances has caused us to delay in surveying parents on the "one card" system until Fall 2012. At this point in time, other than the fact the students has a card to swipe for meals the process has not changed significantly for parents. Development of these tools will be a 2012-2013 objective, and the survey will be incorporated.</p>
10/14/2011	All Collegiate High School students have been issued a Spartan Card (Lee ECHS) or a Panther Card (Charlotte ECHS) and are using those cards for lunch purchases.

#### Actual Results

Date	Actual Results
01/16/2012	100% of ECHS students have been given a "Connect Card" - All students electing to participate in the school lunch program have used the Connect Card to do so.
01/16/2012	Determination was made that simply having the "Connect Card" was not enough to survey students and parents. Identification of additional tools that would assist the high school parents in managing their student's lunch account were needed. As a result, we will be implementing online deposits to the Connect Card and email alerts when a students account reaches a designated low balance. It was determined the survey would be more effective once these tools are in place. Expected roll out is August 2012.

#### Use of Results

Date	Use of Results
01/16/2012	Based on the initial implementation of the "Connect Card" and the feedback recieved by the high schools, we will continue with the meal plan initiative and possibly expand to including breakfast. In addition, a system needs to be developed to allow parents to receive information when their students reach a low credit balance. In addition, allowing parents to make deposits online vs. sending in payment via check would allow for deposits to appear quicker on a student's account. Based on these findings, these items will be objectives for the 2012-2013 unit plan and will be in place by August 2012.

#### Gap Analysis

There are no Gap Analyses Results to Display

#### SWOT Analysis

There are no SWOT Analyses Results to Display

#### Units Impacted

Date	Unit Code	Planning Unit	Unit Manager
01/16/2012	201247	Banner Applications	Dudley, Jason

#### Associated Standards

There are no Associated Standards to Display

#### Associated Outcomes

Obj ID	Objective	Objective Purpose	Objective Status
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**Objective Description**

Once the Affordable Text Book initiative is implemented completely, Auxiliary Services will ensure that students have greater access to learning resources, textbooks, and supplies. This will assist the institution in its compliance with The Higher Education Opportunity Act and the State Textbook Affordability regulation.

**Institutional Goals****Objective Types****Planning Priorities**

No Institutional Goals to Display

No Objective Types to Display

No Planning Priorities to Display

**Tasks**

Due Date	Status	Priority	Task	Budget Amount
10/30/2011	Complete	High	Gather baseline date for comparison of rental and digital titles.	\$0
11/30/2011	Incomplete	High	Put together marketing materials for students for Spring semester	\$0

**Assessment Measures**

Date	Assessment Measure
07/28/2011	Count of titles available via digital formats
07/28/2011	Count of titles available via rental program
07/28/2011	Percentages of text purchased as new

**Intended Results**

Date	Intended Results
07/12/2011	By the end of the 2011-2012 academic year, the number of titles available through digital formats will increase 40%.
07/12/2011	By the end of the 2011-2012 academic year, the number of titles available through the rental program will increase 10%.
07/12/2011	By the end of the 2011-2012 academic year, auxiliary services (in collaboration with the Textbook Adoption Committee) will decrease the percentage of textbooks purchased as new by 5% (this will result in 75% of textbooks purchased as new)

**Status Reports**

Report Date	Status Report
1/16/2012	Fall 2011 showed 53% increase in texts available in digital format and a 22% increase in texts available for rent.
1/16/2012	Fall sales numbers show an increase in the % of new texts purchased. Upon investigation into why, we were able to pull data on when textbook adoptions are being completed. Timely adoptions drive the bookstore's ability to buy back used texts from students, providing more money to students and allowing the bookstore to have those used texts available on the shelves. In addition, the earlier the adoptions the better buying opportunity the bookstore has in the wholesale market. Based on the attached documentation, it is clear that adoptions are coming in after the major buy back periods and not meeting deadlines provided to the departments. Auxiliary Services will work with the Course Materials Committee in reviewing COPS and making recommendations to the VPAA on increasing compliance.
1/16/2012	Marketing of rental and e-text options were enhanced both in store and through campus posters for Spring 2012. Numbers are pending and should be available in February.
10/18/2011	Baseline date received from Follett.
10/14/2011	Request sent to Follett to provide baseline numbers for digital and rental titles by semester.

**Actual Results**

Date	Actual Results
01/16/2012	For Fall 2011: 53% increase in digital texts available and 22% increase in rental texts. Fall 2011 sales show an increase in % of new texts purchases.

#### Use of Results

Date	Use of Results
01/16/2012	This data will be shared with the Course Materials Committee and action plans will be developed to work with educating faculty on the importance of timely adoptions as well as the implication of choices they make in textbook selection. Marketing was enhanced regarding textbook rental and e-text for the Spring 2012 semester...numbers will be forthcoming.

#### Gap Analysis

There are no Gap Analyses Results to Display

#### SWOT Analysis

There are no SWOT Analyses Results to Display

#### Units Impacted

There are no Units Impacted to Display

#### Associated Standards

There are no Associated Standards to Display

#### Associated Outcomes

Obj ID	Objective	Objective Purpose	Objective Status
1400	Connect Card Initiative - Bookstore Buying Days	Operational Outcome	Pending Approval

#### Objective Description

Once implemented completely, auxiliary services in collaboration with Enterprise Application Services will facilitate the effective integration of Bookstore Buying Days into the One Card program.

#### Institutional Goals

No Institutional Goals to Display

#### Objective Types

No Objective Types to Display

#### Planning Priorities

No Planning Priorities to Display

#### Tasks

Due Date	Status	Priority	Task	Budget Amount
10/02/2011	Complete	High	CBORD integration with Follett's POS system to be completed on all three campuses	\$0
12/05/2011	In Progress	High	Issue new Connect Cards to all students awarded financial aid for Spring 2011 who have enough aid to cover bookstore charges.	\$0

#### Assessment Measures

Date	Assessment Measure
07/28/2011	Percentage of financial aid students with activated One card
07/28/2011	Statistics concerning One card purchases in book store

#### Intended Results

Date	Intended Results
07/12/2011	By May 2012, 100% of students with sufficient financial aid credits to cover purchases in the bookstore will be provided with One card (reliant on marketing efforts and portable carding station efficiency)
07/12/2011	By the end of the 2011-2012 academic year, 85% of financial aid students (with sufficient financial aid overages to make purchase in the bookstore) will purchase materials via financial credits loaded on their One card

### Status Reports

Report Date	Status Report
1/16/2012	Bookstore Buying Days with Financial Aid ran Decemebr 19 - January 14th, 2012. In order for students to access their financial aid to purchase books in the bookstore they needed to have their Connect Card. Our goal was set to have 100% of students with aid available for books to have received their Connect Card. In order to achieve this we had an aggressive campaign via website, poster, eStatements and targeted emails. In addition we included portable ID stations to "grab" students as they were about campus. During the winter break, while boostore buying days were occuring we had a portable ID station available in the Lee Campus bookstore. We show approximately 75% of students with available aid received their Connect Card. We attribute the loss of 25% due to students being online (they were able to access aid online without obtaining the physical card) or the students chosed to purchase textbooks elsewhere and did not see the immediate need to get the Connect Card.
10/14/2011	Re-Carding of students district-wide began on October 3rd. Daily raffles are being conducted through November 4 to encourage students to come in and get their new card.

### Actual Results

Date	Actual Results
01/16/2012	Approximately 75% of students with available aid for bookstore purchasing received their Connect Card. We attribute not reaching 100% due to students being online/distant learners that did not need to have the physical card or the students chose to purchase texts elsewhere without using their financial aid.  Over \$8,000,000 in financial aid was available for access through the Connect Card for Spring 2012, with just shy of \$1.4 Million in actual charges.

### Use of Results

Date	Use of Results
01/16/2012	Although obtaining the Connect Card is now a "regular step" in the new student orientation process, we will continue to target market to financial aid recipients each semester to ensure they are aware of the process for using the Connect Card to access their financial aid in the bookstore.
01/16/2012	A new objective for 2012-2013 will be to enhance the process with which a student "accepts" the ability to use their aid early. In some cases, a student may utilize aid to make purchases and then "lose" all or a portion of that aid resulting in a receivable to the College. We will set up a process where the student will formally accept a "book loan" through the student portal. Upon accepting the terms and condition, the "loan" up to a set amount of \$700 will be sent to their card. The intention is to reduce the book charge receivables due the College each semester.

### Gap Analysis

There are no Gap Analyses Results to Display

### SWOT Analysis

There are no SWOT Analyses Results to Display

### Units Impacted

Date	Unit Code	Planning Unit	Unit Manager
01/16/2012	201247	Banner Applications	Dudley, Jason

### Associated Standards

There are no Associated Standards to Display



<b>Unit Code:</b>	<b>Planning Unit:</b>	<b>Unit Manager</b>
201247	Banner Applications	Dudley, Jason

### Unit Purpose

There is no Unit Purpose to Display

### Unit Goals

There are no Unit Goals to Display

Obj ID	Objective	Objective Purpose	Objective Status
1437	Security Management Application	Operational Outcome - New Initiative	Approved

### Objective Description

By creating a comprehensive Security Management Application, Enterprise Application Services will be able to monitor, grant, audit, view and disable end user security across multiple enterprise applications from a single access point. This allows for more controlled and secure environment across the enterprise applications. In addition the application will allow for a more efficient and automated removal and granting of access across multiple applications.

Institutional Goals	Objective Types	Planning Priorities
No Institutional Goals to Display	No Objective Types to Display	No Planning Priorities to Display

### Tasks

There are no Tasks to Display

### Assessment Measures

Date	Assessment Measure
08/10/2011	Number of applications available thru the console
08/10/2011	Reduce time between termination date and end user access removal on all enterprise solutions
08/10/2011	User access audits

### Intended Results

Date	Intended Results
08/10/2011	By June 2012 Enterprise Application Services will have all of the enterprise applications using the security console.
08/10/2011	By June 2012 50% of the applications will have automated removal of access when the employee terminates
08/10/2011	By June 2012 EAS will have performed end user access audits for all applications with responsible stakeholders.

### Status Reports

Report Date	Status Report
1/17/2012	<p>The user access form has been created in webforms and the workflow has been created behind it. It is currently being tested.</p> <p>Enhancements have been made to the Banner automated account terminations to look at all terminations regardless of date of entry due to lag in time between termination and entry into Banner.</p> <p>We have downloaded new software, Symphony, to assist in the creation of the security management console. The framework has been installed and completed.</p>
10/14/2011	<p>Enterprise Application Services has completed testing on the automated termination process in Banner. The shell for the management console has been created.</p> <p>A new user access form is being developed in Banner Workflow to track and automate the granting of access process with approvals.</p>

#### Actual Results

There are no Actual Results to Display

#### Use of Results

There are no Use of Results to Display

#### Gap Analysis

There are no Gap Analyses Results to Display

#### SWOT Analysis

There are no SWOT Analyses Results to Display

#### Units Impacted

There are no Units Impacted to Display

#### Associated Standards

There are no Associated Standards to Display

#### Associated Outcomes

Obj ID	Objective	Objective Purpose	Objective Status
1438	Xtender Implementation (Paperless)	Operational Outcome	Approved

#### Objective Description

Continued Implementation of the Banner Document Management Suite (paperless initiative) across multiple areas of the College providing secure, quick access to files and records in a more proficient and effective manner.

Institutional Goals	Objective Types	Planning Priorities
No Institutional Goals to Display	No Objective Types to Display	No Planning Priorities to Display

#### Tasks

There are no Tasks to Display

#### Assessment Measures

Date	Assessment Measure
08/10/2011	Report showing the number of scanned documents related to implementation area

#### Intended Results

Date	Intended Results
08/10/2011	By Jun 2012, Xtender will be implemented in Financial Services as demonstrated by 70% of all document-types being in scanned, electronic format
08/10/2011	By December 2012, Xtender will be implemented in Procurement Services as demonstrated by 70% of all document-types being in scanned, electronic format
08/10/2011	By June 2012, Xtender will be implemented in Payroll Services as demonstrated by 70% of all document-types being in scanned, electronic format
08/10/2011	By June 2012, Xtender will be implemented in Human Resources as demonstrated by 70% of all document-types being in scanned, electronic format
08/10/2011	By June 2012, Xtender will be implemented in Auxiliary Services as demonstrated by 70% of all document-types being in scanned, electronic format

## Status Reports

Report Date	Status Report
1/17/2012	All of Accounting Services has been trained and are currently using Xtender.
1/13/2012	Set up additional document types for Facility Rental Contracts to allow Xtender to be used by Auxiliary Services for Facility Rentals
12/16/2011	Procurement Services has sent the data fields that they would like to capture in Xtender. EAS has the list and will begin to build the cabinets. Associated document "Banner Xtender Database for Procurement."
12/9/2011	Met with Human Resources to determine cabinet layout for Xtender. Document is attached "HR Proposed File Structure"
12/1/2011	Additional Scanners have been ordered and recieved for Accounts Receivable area. Working with Dwaine Keddo and Helen Valdes to test and set up.
10/14/2011	Xtender has been rolled out to the Finance Department which includes Purchasing, Budget and Accounts Payable. Purchasing has scanned all documents from 7/1  Scanners are being ordered for Payroll and HR. A network drop is being planned in the HR location as well as desk scanners.  Scanners have been rolled out for Auxiliary Services. A new document type "Facility Rental Agreement" has been added. Training will take place in the next month.

## Actual Results

Date	Actual Results
01/17/2012	To date ,2176 documents have been scanned and indexed for Financial Services into BDMS and 45 Travel documents have been scanned and indexed into BDMS

## Use of Results

There are no Use of Results to Display

## Gap Analysis

There are no Gap Analyses Results to Display

## SWOT Analysis

There are no SWOT Analyses Results to Display

## Units Impacted

There are no Units Impacted to Display

## Associated Standards

There are no Associated Standards to Display

## Associated Outcomes





<b>Unit Code:</b>	<b>Planning Unit:</b>	<b>Unit Manager</b>
00200	Charlotte Campus Administrative Services	Thompson, Kirsten

### Unit Purpose

There is no Unit Purpose to Display

### Unit Goals

There are no Unit Goals to Display

Obj ID	Objective	Objective Purpose	Objective Status
1410	Comprehensive Preventative Maintenance Program	Operational Outcome	Implementing

### Objective Description

Implement a comprehensive preventative maintenance program to preserve aging campus facilities.

Institutional Goals	Objective Types	Planning Priorities
No Institutional Goals to Display	No Objective Types to Display	No Planning Priorities to Display

### Tasks

There are no Tasks to Display

### Assessment Measures

Date	Assessment Measure
07/14/2011	Preventative Maintenance Schedule
07/14/2011	Quarterly Inspection Checklist
07/14/2011	Work Order Tracking Log
07/14/2011	Facility Satisfaction Survey

### Intended Results

Date	Intended Results
03/31/2012	Complete thorough inspection of facilities using the facility inspection checklist.
06/30/2012	Complete thorough inspection of facilities using the facility inspection checklist.
06/30/2012	Within 90 days of quarterly inspection, 95% of all generated work orders will be complete.
06/30/2012	At the end of each semester, 90% of respondents will rate their satisfaction with campus facilities as 4.0 on a scale of 1 to 5 on the satisfaction survey.
09/01/2011	By September 1, 2011, create a five year cycle preventative maintenance plan to address painting, floor care and carpet replacement, window cleaning, and repairs.
09/01/2011	By September 1, 2011, create a comprehensive facility inspection checklist.
09/30/2011	Complete thorough inspection of facilities using the facility inspection checklist.
12/31/2011	Complete thorough inspection of facilities using the facility inspection checklist.

### Status Reports

Report Date	Status Report
1/30/2012	A follow up e-mail was sent to all faculty to gather information on additional classroom technology needed. Only three faculty responded. Based on their requests, it was determined that a faculty focus group would not be necessary.
1/30/2012	Labels were made for each classroom and placed on the classroom telephones, informing faculty to contact Public Safety after hours for room temperature adjustments.
1/23/2012	The quarterly inspection checklist has been revised to a simpler format and will be used for inspections due March 31, 2012.
1/17/2012	Zero (0) work orders were generated from the 4th quarter inspections.
1/13/2012	The five year preventative maintenance schedule was updated to reflect results of two quarterly inspections.
12/16/2011	Quarterly inspections for the period October - December 2011 complete.
12/14/2011	A Fall 2011 Faculty Feedback survey was sent via Survey Monkey on December 2, 2011 and closed on December 14, 2011.
11/22/2011	Forty one (41) work orders were generated at the completion of the 3rd quarter inspections (Work # 201144 - 201188).
11/14/2011	The following tasks have been completed: creation of five year preventative maintenance plan, completion of a facility inspection checklist, and a comprehensive facility inspection for the 3rd quarter of 2011.

### Actual Results

Date	Actual Results
01/17/2012	Forty one (41) work orders were generated at the completion of the 3rd quarter inspections (Work # 201144 - 201188). We did not meet our goal of completing 95% of work orders within 90 days of completion of inspections. There are several reasons we did not meet this goal. 1) Limited clerical support to process inspection logs and generate work orders in a timely manner. 2) Work load of existing maintenance staff to do this work in house is high. Plant coordinator spends majority of his time on administrative tasks and has limited time for completing repairs. 3) Several of the repairs were not budgeted and funded. Availability of funds is pending, depending on remaining budget balances closer to the end of the fiscal year.
12/14/2011	The Fall 2011 Faculty feedback survey was sent to 95 full time and adjunct faculty. Thirty eight (38) responses were received for a return rate of 40%. Of the responses, 87% rated their satisfaction with facilities 4.0 or higher on a scale of 1 to 5. There were several responses regarding room temperatures and cleanliness which require additional follow up.

### Use of Results

Date	Use of Results
01/17/2012	The quarterly inspection checklist that was created is cumbersome. One sheet was created for each space. To upload each of these documents for two quarters of inspections would require 175 uploads for each of the two quarters. These files are available and can be forwarded upon request. The checklist will be revised to a simpler format by February 29th for the next quarter inspections.
01/17/2012	Preventative maintenance plan and work order log will be used to support additional budget funds in the upcoming fiscal year, both funds for actual repairs and supplies, and a New Initiative for additional maintenance staffing.
12/14/2011	Based on Fall 2011 Faculty Feedback Survey, signs will be posted in each classroom informing instructors to notify Public Safety if there are room temperature issues. Public Safety will notify an on call maintenance staff person who can adjust the temperature remotely.
12/14/2011	Based on Fall 2011 Faculty Feedback Survey, Facilities will schedule a random weekly inspection with the janitorial vendor. A checklist has been created to ensure contract specifications are performed daily.
12/14/2011	Based on Fall 2011 Faculty Feedback Survey, a faculty focus group will be scheduled to determine what types of classroom technology is needed that we do not currently offer.

### Gap Analysis

There are no Gap Analyses Results to Display

**SWOT Analysis**

There are no SWOT Analyses Results to Display

**Units Impacted**

There are no Units Impacted to Display

**Associated Standards**

There are no Associated Standards to Display

**Associated Outcomes**

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<b>Unit Code:</b> 000171	<b>Planning Unit:</b> Charlotte Campus President	<b>Unit Manager</b> Land, Patricia
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### Unit Purpose

Provide the programs and services of the college to the citizens of Charlotte County.

### Unit Goals

There are no Unit Goals to Display

Obj ID	Objective	Objective Purpose	Objective Status
1402	Expand Campus Opportunities for Service Learning and Civic Engagement	Operational Outcome - New Initiative	Approved

### Objective Description

Faculty, staff and students will demonstrate increased participation in service learning and civic engagement activities.

Institutional Goals	Objective Types	Planning Priorities
C. Identify and address the programmatic needs of the socio-economic diversity in the region	No Objective Types to Display	No Planning Priorities to Display

Tasks				
Due Date	Status	Priority	Task	Budget Amount
08/30/2011	Incomplete	High	Meet with all staff and students to continue encouraging participation.	\$0
01/20/2012	Incomplete	High	Mid-year survey.	\$0

### Assessment Measures

Date	Assessment Measure
07/12/2011	Use previous year's survey to measure participation change.

### Intended Results

Date	Intended Results
07/12/2011	A 10% increase in student, faculty and staff participation will be recorded over the previous year's survey of civic involvement.

### Status Reports

Report Date	Status Report
9/19/2011	Met with faculty and staff during inservice. Encouraged them to continue last year's service effort.

### Actual Results

There are no Actual Results to Display

### Use of Results

There are no Use of Results to Display

### Gap Analysis

There are no Gap Analyses Results to Display

### SWOT Analysis

There are no SWOT Analyses Results to Display

**Units Impacted**

There are no Units Impacted to Display

**Associated Standards**

There are no Associated Standards to Display

**Associated Outcomes**

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<b>Unit Code:</b>	<b>Planning Unit:</b>	<b>Unit Manager</b>
00216	Collier Campus Administrative Services	O'Leary, Andre

### Unit Purpose

There is no Unit Purpose to Display

### Unit Goals

There are no Unit Goals to Display

Obj ID	Objective	Objective Purpose	Objective Status
1514	Collier Campus Facility Rental Increase	Operational Outcome	Implementing

### Objective Description

Once the outreach and community partnership is implemented, we will increase facility rentals by 10% over the previous year

Institutional Goals	Objective Types	Planning Priorities
A. Allocate financial resources aligned with College priorities	No Objective Types to Display	No Planning Priorities to Display

Tasks				
Due Date	Status	Priority	Task	Budget Amount
01/13/2012	Complete	High	Create tracking spreadsheet for all facility revenue that can be utilized to cross checked to banner generated revenue reports.	\$0
03/23/2012	In Progress	High	Create a list of all vendor banner numbers to assist with tracking facility revenue (checks deposited).	\$0
01/12/2012	Complete	Medium	Hold meeting/training with cashiers to review and train on COP 04-309 Decentralized cash and check collection.	\$0

### Assessment Measures

Date	Assessment Measure
02/02/2012	Detailed tracking spreadsheet for booked facility rental events/Banner Facility Rental Report.
09/14/2011	Quarterly Auxiliary Operation budget reports.
09/14/2011	Reports generated from Resource 25 (event scheduling software).

### Intended Results

Date	Intended Results
02/29/2012	By the end of the FY 2012, the facility rental report will demonstrate a 10% increase in bookings over FY2011
02/29/2012	By the end of 2012FY, we will have useful baseline data concerning facility usage generated from R25
09/14/2011	By the end of the 2012FY, auxiliary budget reports from Banner will demonstrate a 10% increase in net revenue over 2011FY

### Status Reports

Report Date	Status Report
2/9/2012	Facility Revenue Rental report data received quarterly from district (see attached quarter one)
2/9/2012	Meeting on 02/10/2012 with district to review second quarter facility revenue reports.

### Actual Results

Date	Actual Results
02/09/2012	First quarter facility revenue reports showed revenue of \$3,510.00

#### Use of Results

Date	Use of Results
02/09/2012	The first quarter report indicates a slight increase in facility rental revenue. Waiting on second quarter facility revenue reports.

#### Gap Analysis

There are no Gap Analyses Results to Display

#### SWOT Analysis

There are no SWOT Analyses Results to Display

#### Units Impacted

There are no Units Impacted to Display

#### Associated Standards

There are no Associated Standards to Display

#### Associated Outcomes

Obj ID	Objective	Objective Purpose	Objective Status
1531	Student Connect Card Activation for Collier Campus	Student Learning Outcome	Pending Approval

#### Objective Description

Support the district to implement the new student Connect Card. By the end of the 2011-2012 academic year more than 50% of Collier students receiving financial aid will be making purchases with the new Connect Card.

Institutional Goals	Objective Types	Planning Priorities
A. Allocate financial resources aligned with College priorities	No Objective Types to Display	No Planning Priorities to Display
A. Develop a comprehensive academic support system		
B. Assess, enhance and implement an effective enrollment and registration process		

#### Tasks

Due Date	Status	Priority	Task
06/30/2012	In Progress	High	Have full service connect card machine and office in student service area to capture ID's for current students and new students.
N/A	Complete	High	Set up connect card office for new cards to be issued.
10/17/2011	Complete	High	Set up connect card office in student services building with extended hours.

#### Assessment Measures

Date	Assessment Measure
09/20/2011	Percentage of financial aid students with activated Connect Cards.
09/20/2011	Statistics and reports from Connect Card usage in the book store.

#### Intended Results

Date	Intended Results
09/20/2011	By the end of the 2011-2012 academic year more than 50% of Collier students receiving financial aid will be making purchases with the new Connect Card.
09/20/2011	By the end of the 2011-2012 academic year more than 75% of the Collier Students will be using the new Connect Card.

### Status Reports

There are no Status Reports to Display

### Actual Results

Date	Actual Results
01/17/2012	The last status report obtained from the district office shows that from September 2011 to December 2011 district wide there have been 10,519 connect cards issued.

### Use of Results

There are no Use of Results to Display

### Gap Analysis

There are no Gap Analyses Results to Display

### SWOT Analysis

There are no SWOT Analyses Results to Display

### Units Impacted

There are no Units Impacted to Display

### Associated Standards

There are no Associated Standards to Display

### Associated Outcomes

Obj ID	Objective	Objective Purpose	Objective Status
1579	Organizational Development Training and Workshops	Operational Outcome	Pending Approval

### Objective Description

Provide organizational learning opportunities that aim to meet the development needs of Collier faculty and staff. The training and development solutions offered will include: one-on-one coaching and professional development workshops, team building, conflict management, CornerStone Experience, Outlook, Excel, and strategic unit planning services.

Institutional Goals	Objective Types	Planning Priorities
A. Develop a shared understanding, application and accountability of learning-centered culture	No Objective Types to Display	* Develop and maintain a learning-centered culture
A. Develop a strategy to capitalize on our partnerships (Internal & External)		Promote, develop and retain a culture that support
B. Develop an administrative leadership program		

### Tasks



Due Date	Status	Priority	Task	Budget Amount
01/05/2012	Complete	High	A professional development training was scheduled on the following topic "Understanding harassment in the workplace" (2.5 hour training) 2 sessions that took place- 01/05/2012 from 5:00 to 7:30 pm and on 01/06/2012 from 9:30 am 12:00 noon.	\$0
02/24/2012	In Progress	High	Working with the campus academic dean and Lori Bronder to schedule smart board technology training to adjuncts and faculty on the Collier campus on 02/24/2012.	\$0

#### Assessment Measures

Date	Assessment Measure
10/04/2011	Staff and faculty attendance numbers from development training workshops.
10/04/2011	Data and feedback collected from staff and faculty attendance surveys.
10/04/2011	A description and a summary of the evaluations of each of the organizational development activities conducted during the year.

#### Intended Results

Date	Intended Results
10/04/2011	Offering organizational learning opportunities for staff and faculty help meet the strategic priority to promote, develop, and retain a culture that supports professional growth of faculty and staff.
10/04/2011	Accommodate changes in disciplines, technology, pedagogy and expectations of students, faculty, and the community.
10/04/2011	Allow faculty and staff to collaborate and increase their capacity to professionally grow.

#### Status Reports

Report Date	Status Report
2/9/2012	This January 2012 training certificates were distributed to faculty and staff from harassment training to add to their professional and/or teaching portfolios.

#### Actual Results

Date	Actual Results
01/17/2012	On professional training sessions held on 01/05/2012 & 01/06/2012 there were 58 attendees (please see attached documents that support with workshop sign in sheets).

#### Use of Results

There are no Use of Results to Display

#### Gap Analysis

There are no Gap Analyses Results to Display

#### SWOT Analysis

There are no SWOT Analyses Results to Display

#### Units Impacted

There are no Units Impacted to Display

#### Associated Standards

There are no Associated Standards to Display

#### Associated Outcomes



<b>Unit Code:</b>	<b>Planning Unit:</b>	<b>Unit Manager</b>
001146	Facilities Planning	Nice, Steve

### Unit Purpose

There is no Unit Purpose to Display

### Unit Goals

There are no Unit Goals to Display

Obj ID	Objective	Objective Purpose	Objective Status
1401	Continuation of Lee Campus Classroom Building Construction	Assessment Outcome	Approved

### Objective Description

To construct proposed building "U" to provide spaces for growing educational programs. Decade of Promise: 2010, goal 3(2); Destination 2020, Organizational and Leadership Development Goal 2.

Project partial completed in 2010 - 2011 planning cycle under outcome number 1061.

Institutional Goals	Objective Types	Planning Priorities
B. Identify and remove barriers	No Objective Types to Display	Develop and maintain a learning-centered culture Identify and develop short and long-term financial

Tasks			
Due Date	Status	Priority	Task
08/19/2011	Complete	High	The project will be inspected for completion.
02/29/2012	In Progress	High	Final paperwork to be completed for project close-out.

### Assessment Measures

Date	Assessment Measure
07/12/2011	Facilities will consider the project operational when the final inspection is complete. Second the project must be operational before the 2011 – 2012 academic year.
07/12/2011	The project will be complete upon receipt of all close out documents.

### Intended Results

Date	Intended Results
07/12/2011	Facilities will ensure the project is monitored, inspected and completed for operation during the 2011 - 2012 academic year.

### Status Reports

Report Date	Status Report
2/3/2012	Building U was inspected and issued a Certificate of Occupancy August 2011. The certificate signifies the building's safety systems are in compliance with applicable State and Federal regulations. Final close-out documentation which includes such items as: as-built drawings, warranty information, equipment information and equipment reports is in progress. LEED certification documentation is in progress.
7/12/2011	The project was partially completed in the 2010 - 2011 planning year. The following assessments were accomplished: construction documents, project cost, and permitting. Various inspection were also completed during the project. The remaining goals will complete the project.

#### Actual Results

There are no Actual Results to Display

#### Use of Results

There are no Use of Results to Display

#### Gap Analysis

There are no Gap Analyses Results to Display

#### SWOT Analysis

There are no SWOT Analyses Results to Display

#### Units Impacted

There are no Units Impacted to Display

#### Associated Standards

There are no Associated Standards to Display

#### Associated Outcomes

Obj ID	Objective	Objective Purpose	Objective Status
1403	Maintenance of Facilities through Electronic Preventative System	Assessment Outcome - New Initiative	Approved

#### Objective Description

Operations will install electronic systems to monitor and provide timely reports on upcoming preventative maintenance items as defined by Plant Operations.

#### Institutional Goals

B. Identify and remove barriers

#### Objective Types

No Objective Types to Display

#### Planning Priorities

Develop and maintain a learning-centered culture

Identify and develop short and long-term financial

#### Tasks

Due Date	Status	Priority	Task
N/A	Complete	Medium	Review and approve enterprise asset management (EAM) software for use.
N/A	Complete	Medium	Review and approve agreement for enterprise asset management software.
N/A	In Progress	Medium	Develop a software implementation plan and implement enterprise asset management software.
N/A	Complete	Medium	Facilities to develop a facility assessment checklist.
N/A	In Progress	Medium	Facilities to inspect and complete an assessment checklist for every room.
N/A	In Progress	Medium	Input the collected information from the assessment checklist into the enterprise asset management software.

#### Assessment Measures

Date	Assessment Measure
07/12/2011	The implementation of the enterprise asset management software will be considered complete when the system is ready for data input of information from the facility assessment checklist.
07/12/2011	The enterprise asset management system will be operational when the database has been completed and preventative maintenance reports can be generated listing weekly, monthly, and annual preventative maintenance reports.

#### Intended Results

Date	Intended Results
07/12/2011	The first project goal will be to implement an electronic preventative maintenance system.
07/12/2011	Goal two will be to assess facility conditions through the use of preventative maintenance reports and develop an updated schedule for preventative maintenance.

#### Status Reports

Report Date	Status Report
2/3/2012	The review and approval process for EAM software is complete. Infor was selected as the enterprise solution. The solution was selected based on factors such as: compatability with existing Banner systems, expandability, and ease of use. The software was installed on College servers and staff training will begin February 2012. The Facility room assessment checklist is complete and each campus room is being surveyed.

#### Actual Results

There are no Actual Results to Display

#### Use of Results

There are no Use of Results to Display

#### Gap Analysis

There are no Gap Analyses Results to Display

#### SWOT Analysis

There are no SWOT Analyses Results to Display

#### Units Impacted

There are no Units Impacted to Display

#### Associated Standards

There are no Associated Standards to Display

#### Associated Outcomes

Obj ID	Objective	Objective Purpose	Objective Status
1404	Master Planning Based on Projected Growth	Operational Outcome - New Initiative	Approved

### Objective Description

Address projected growth by analysis of the existing spaces, projected enrollment, projected environmental impacts, and projected academic programming.

Institutional Goals	Objective Types	Planning Priorities
B. Identify and remove barriers	No Objective Types to Display	Identify and develop short and long-term financial

Tasks				
Due Date	Status	Priority	Task	Budget Amount
N/A	Complete	Medium	Develop a facility assessment checklist.	\$0
N/A	In Progress	Medium	Assess facilities based on facility assessment checklist.	\$0
N/A	In Progress	Medium	Work with the Administration to review academic scheduling and determine current and future needs of the college.	\$0
N/A	In Progress	Medium	Develop documentation per State Requirements for Facilities, Department of Education and Florida Statutes which will comprise the Educational Plant Survey for review by the Board of Trustees and Department of Education.	\$0

### Assessment Measures

Date	Assessment Measure
07/13/2011	The facility inventory will be considered complete when all collected data has been input into the facilities inventory database, certified for accuracy and submitted to Department of Education.
07/13/2011	The Educational Plant Survey will be complete when the Department of Education certifies the document has met the requirements as required by Florida Statutes, Department of Education, and State Requirements for Educational Facilities.

### Intended Results

Date	Intended Results
07/12/2011	Goal one will be to assess the existing facilities and update the Facilities Inventory report.
07/12/2011	Goal two will include the development of a revised Educational Plant Survey which will comply with state requirements and be approved by the Board of Trustees and Department of Education.

### Status Reports

Report Date	Status Report
2/3/2012	Accurate data is critical in developing a planning strategy to address projected growth. The initial step of developing a facility assessment checklist was completed. The next step of surveying the spaces is in progress. This data will form the basis for the development of the review and Educational Plant Survey (EPS).

### Actual Results

There are no Actual Results to Display

### Use of Results

There are no Use of Results to Display

### Gap Analysis

There are no Gap Analyses Results to Display

### SWOT Analysis

There are no SWOT Analyses Results to Display

**Units Impacted**

There are no Units Impacted to Display

**Associated Standards**

There are no Associated Standards to Display

**Associated Outcomes**

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<b>Unit Code:</b>	<b>Planning Unit:</b>	<b>Unit Manager</b>
000137	Financial Aid	Paine, Barry

### Unit Purpose

2009-2009

### Unit Goals

There are no Unit Goals to Display

Obj ID	Objective	Objective Purpose	Objective Status
1395	Create Benchmarks to Increase Student Success and Satisfaction in the Financial Aid Process	Operational Outcome	Implementing

### Objective Description

Using management reports and student evaluations, identify areas needing improvement to increase student success and satisfaction with the financial aid process.

Institutional Goals	Objective Types	Planning Priorities
B. Assess, enhance and implement an effective enrollment and registration process	No Objective Types to Display	No Planning Priorities to Display

Tasks				
Due Date	Status	Priority	Task	Budget Amount
N/A	In Progress	High	Production of management reports.	\$0
03/02/2012	In Progress	High	Survey students	\$0

### Assessment Measures

Date	Assessment Measure
02/01/2012	Financial Aid satisfaction survey
07/11/2011	Management reports

### Intended Results

Date	Intended Results
07/11/2011	Summary reports of key performance indicators will be produced on a weekly basis beginning October 15, 2011
07/11/2011	Student surveys will be developed and students surveyed once per term by the end of each term beginning with fall 2011.

### Status Reports

Report Date	Status Report
2/1/2012	Initial reports are being run. Student surveys have not been given to students yet.
10/14/2011	Report specifications are being developed.

### Actual Results

Date	Actual Results
02/01/2012	Higher number of enrolled financial aid applicants for spring 2012 than spring 2011 despite lower number of overall enrolled students.



**Use of Results**

Date	Use of Results
02/01/2012	Continued emphasis on more timely procesing of applications.

**Gap Analysis**

There are no Gap Analyses Results to Display

**SWOT Analysis**

There are no SWOT Analyses Results to Display

**Units Impacted**

There are no Units Impacted to Display

**Associated Standards**

Standard Number	Standard Description
02-0101	Process to develop and revise college operating procedures

**Associated Outcomes**

Obj ID	Objective	Objective Purpose	Objective Status
1396	Improve Staff Understanding of Financial Aid Programs	Operational Outcome	Implementing

**Objective Description**

Providing staff with comprehensive documentation of office procedures and training to deliver more complete and accurate information to students about financial aid programs and how they can receive financial assistance.

Institutional Goals	Objective Types	Planning Priorities
B. Assess, enhance and implement an effective enrollment and registration process	No Objective Types to Display	No Planning Priorities to Display

Tasks				
Due Date	Status	Priority	Task	Budget Amount
N/A	In Progress	High	Documentation of financial aid processes to be completed by March 1, 2012.	\$0
N/A	In Progress	High	Training schedule established by September 1, 2011.	\$0
N/A	In Progress	High	Students surveys started November 1, 2011 to assess their perception of completeness and accuracy of financial aid information.	\$0

**Assessment Measures**

Date	Assessment Measure
02/02/2012	Completion of operational documenation
02/02/2012	Scheduled training
07/11/2011	Student surveys

**Intended Results**

Date	Intended Results
02/02/2012	Training schedule established by September 1, 2011.
02/02/2012	Students surveys started November 1, 2011 to assess their perception of completeness and accuracy of financial aid information.
07/11/2011	Documentation of financial aid processes to be completed by March 1, 2012.

#### Status Reports

Report Date	Status Report
2/2/2012	Training has also been started.
2/2/2012	Student Surveys have not been completed
10/14/2011	Documentation of the processes has begun.

#### Actual Results

Date	Actual Results
02/02/2012	Training of staff has been started on a number of subjects including general student services topics and specific financial aid topics such as students meeting eligibility criteria and use of the Banner system for managing financial aid.
02/02/2012	Documentation of student eligibility criteria, use of theBanner system, and processing details has been provided to the staff

#### Use of Results

Date	Use of Results
02/02/2012	Priorities for additional training have been established . Specifically on satisfactory academic progress issues and the verification process.
02/02/2012	Documenation is being used to train staf as it is developed.

#### Gap Analysis

There are no Gap Analyses Results to Display

#### SWOT Analysis

There are no SWOT Analyses Results to Display

#### Units Impacted

There are no Units Impacted to Display

#### Associated Standards

Standard Number	Standard Description
02-0101	Process to develop and revise college operating procedures

#### Associated Outcomes

Obj ID	Objective	Objective Purpose	Objective Status
1397	Increase student awareness of Financial Aid availability through publications	Student Learning Outcome	Implementing

#### Objective Description

As a result of more detailed information published about general financial aid information and Edison State College policies and procedures students will be more knowledgeable about how to successfully apply and receive financial aid.

**Institutional Goals**

B. Assess, enhance and implement an effective enrollment and registration process

**Objective Types**

No Objective Types to Display

**Planning Priorities**

No Planning Priorities to Display

**Tasks**

Due Date	Status	Priority	Task
N/A	In Progress	High	Develop reports of key statistics
N/A	In Progress	High	Develop student survey

**Assessment Measures**

Date	Assessment Measure
02/02/2012	Student surveys.
07/11/2011	Management reports on number of applications

**Intended Results**

Date	Intended Results
07/11/2011	By the end of the 2011-2012 academic year analysis of the management reports and student surveys will show an improvement in the successful application and receipt of financial aid.
07/11/2011	Student surveys will be developed and students surveyed once per term by the end of each term beginning with fall 2011 to assess student knowledge of financial aid. The initial target will be 75 % of survey questions answered correctly.
07/11/2011	More information will be available online on the College's website in a variety of formats beginning October 15, 2011.

**Status Reports**

Report Date	Status Report
2/2/2012	Management reports have been developed for some key statistics
10/14/2011	Additional information has been added to the website. Financial Aid workshops have been organized for current students.

**Actual Results**

Date	Actual Results
02/02/2012	Students are attending workshops.
02/02/2012	Key statistics are now available

**Use of Results**

Date	Use of Results
02/02/2012	Additional workshops have been scheduled and a financial aid component is being developed for orientations.
02/02/2012	Comparison of current year numbers with prior years is being used to identify trends.

**Gap Analysis**

There are no Gap Analyses Results to Display

**SWOT Analysis**

There are no SWOT Analyses Results to Display

**Units Impacted**

There are no Units Impacted to Display

**Associated Standards**

There are no Associated Standards to Display

**Associated Outcomes**

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<b>Unit Code:</b>	<b>Planning Unit:</b>	<b>Unit Manager</b>
08302011	Foundation - Alumni	Wells, Barbara

### Unit Purpose

There is no Unit Purpose to Display

### Unit Goals

There are no Unit Goals to Display

Obj ID	Objective	Objective Purpose	Objective Status
1429	Event Participation by Students	Operational Outcome	Implementing

### Objective Description

The unit will provide current students with opportunities to participate in events that they find relevant and attractive. The success of this will be expressed in current student participation rates in alumni activities

### Institutional Goals

A. Develop a strategy to capitalize on our partnerships (Internal & External)

B. Expand Edison State Colleges engagement in the region

### Objective Types

No Objective Types to Display

### Planning Priorities

\* Enhance the regional image of Edison State College

Provide vibrant, relevant programs

Develop, maintain and enhance collaborative partne

### Tasks

Due Date	Status	Priority	Task	Budget Amount
N/A	In Progress	Medium	a) Partner with the SGA to initiate "getting to know you" events (Welcome Back Week, Club Rush, etc.) b) Partner with the SGA to initiate "get involved" events (SGA Leadership Conference, Student Appreciation Day, etc.) c) Host student/alumni events/outings d) Establish a locale(s) on each campus where information about joining and participating in the Alumni Association will be displayed e) Procure promotional items to help brand the ESC Alumni Association and build awareness and excitement on & off campus f) Promote awareness and participation in the Association via on-campus outlets (TV slides, posters/flyers in student center, library, bookstore)	\$0

### Assessment Measures

Date	Assessment Measure
07/22/2011	Event sign-up sheets: "marquis bookend events"
07/22/2011	Percentages of attendances from invitation lists
07/22/2011	Awareness survey results

### Intended Results

Date	Intended Results
07/22/2011	By the end of the 2011-2012 academic year, 1% of the current (college credit) student population will attend and provide us with their names and Edison e-mail addresses (this will be a baseline measure)
07/22/2011	By the end of the 2011-2012 academic year, 10% of the people that we invited to events (based on lists developed above) will attend these events
07/22/2011	By the end of the 2011-2012, a survey of current students will provide us with base line awareness data concerning the alumni association

### Status Reports

Report Date	Status Report
1/17/2012	Participated in Lee Campus Club Rush on January 11, 2012; Collier Campus Presidents Luau on January 12, 2012; Charlotte Campus Club Rush on January 17, 2012
1/17/2012	Alumni staff spoke at "Lunch and Learn" Student Leadership Series on 10/20/11. Promoted alumni association and surveyed group about concept of Student Alumni Association/Club.
10/14/2011	<p>a) Participated in Lee Campus Club Rush on 8/31/11; Collier Campus Welcome Back on 9/6/11; Charlotte Campus Club Rush on 9/7/11</p> <p>b) Hosted alumni panel discussion at District Student Leadership Conference on 9/23/11</p> <p>c) Hosted alumni foursome in Ft. Myers Chamber of Commerce Golf Tournament on 10/14/11; hosted outing with alumni &amp; students at Everblades Hockey Game on 10/15/11</p> <p>d) Lee Campus - alumni membership materials in Nursing Building/Walker Hall, Student Services Building/Taeni Hall, Rush Library, Alumni Office; Charlotte Campus - alumni materials in Student Life office and Student Services areas; Collier Campus - alumni materials in Student Services and Foundation offices</p> <p>e) Procured alumni keytags, pens, mugs, post-it notes, mousepads, hockey puck stress relievers</p> <p>f) Promoting awareness via membership brochures on each campus, alumni books in bookstores, alumni booksigning event in Rush library, alumni materials at Charlotte and Lee POPS events 10/15/11 and 10/22/11</p>

### Actual Results

Date	Actual Results
01/17/2012	<p>Student Attendance and email addresses:</p> <p>Lee Campus Club Rush - January 2012 -- 61 students</p> <p>Collier Campus Presidents Luau -- January 2012 -- 50 students</p> <p>Charlotte Campus Club Rush -- January 2012 -- 26 students</p>
01/17/2012	Students surveyed at "Lunch & Learn" Leadership series on 10/20/11 expressed significant interest in a Student Alumni Association/Club. Alumni staff member has met twice with Student Life staff to explore possibility and begin preparations for this student club.
01/17/2012	Student Alumni Association Interest Survey conducted on 10/20/11 -- of the 22 student respondents, 21 indicated interest in participating in a Student Alumni Association
10/18/2011	<p>Student attendance and email addresses:</p> <p>Club Rush/Welcome Events --</p> <p>* Lee Campus - 198</p> <p>* Charlotte Campus - 74</p> <p>* Collier Campus - 35</p>

### Use of Results

Date	Use of Results
01/17/2012	Alumni and Student Life staff are working with students to design a new Student Alumni Club. These members will provide volunteer support for campus and community events. For now, alumni have been invited to participate with students at the annual Edison Festival of Lights Parade in February 2012.
01/17/2012	Awareness has been expanding on all campuses through posters, brochures, speaking engagements, slides, nursing pinnings and graduations. Students have become friends on the Alumni Facebook page. We have accessed student emails via participation in Club Rushes and are now able to invite their participation in other events.
01/17/2012	Students gave very high marks for the alumni panel presentation at the Student Leadership Conference. This feedback dictates that we provide more of this kind of programming, bridging Alumni Relations with Student Life and Career Services.  Attendance at job fairs by students and the community, and feedback from the alumni survey, indicates the need to continue to offer this type of programming. Again, the collaboration between Alumni Relations, Student Life and Career Services has been successful and mutually beneficial.

### Gap Analysis

There are no Gap Analyses Results to Display

### SWOT Analysis

There are no SWOT Analyses Results to Display

### Units Impacted

There are no Units Impacted to Display

### Associated Standards

There are no Associated Standards to Display

### Associated Outcomes

Obj ID	Objective	Objective Purpose	Objective Status
1436	Enhanced Alumni Participation in College Events	Operational Outcome	Implementing

### Objective Description

Once this year's outreach effort is implemented, alumni will have an appreciation for Edison State College's continued relevance in their lives. The success of this effort will be demonstrated through enhanced alumni participation in social media, events, Alumni Association membership and Foundation support

### Institutional Goals

A. Develop a strategy to capitalize on our partnerships (Internal & External)  
B. Expand Edison State Colleges engagement in the region

### Objective Types

No Objective Types to Display

### Planning Priorities

\* Enhance the regional image of Edison State College  
Provide vibrant, relevant programs  
Develop, maintain and enhance collaborative partne

### Tasks

Due Date	Status	Priority	Task	Budget Amount
N/A	In Progress	Medium	a) Establish a locale(s) on each campus where information about joining and participating in the Alumni Association will be displayed b) Procure promotional items to help brand the ESC Alumni Association and build awareness and excitement on & off campus c) Negotiate with each college bookstore to promote and sell alumni merchandise and books by alumni authors d) Update the ESC website and alumni page to include additional links/information about the Alumni Association, its benefits and programs e) Promote awareness and participation in the Association via on-campus outlets (TV slides, posters/flyers in student center, library, bookstore) f) Prepare and send press releases/newsletters concerning notable alumni, Alumni Association programs and/or opportunities for involvement g) Submit Alumni Association articles for inclusion in foundation and college publications h) Attend Chamber of Commerce, Rotary and other community meetings & events, to promote the Alumni Association, locate "lost" alumni and recruit mentors i) Initiate a Distinguished Alumni Award – introduce at Celebration of Excellence j) Identify and cultivate key alumni prospects – invite to college events and outings	\$0
N/A	In Progress	Medium	b) Procure promotional items to help brand the ESC Alumni Association and build awareness and excitement on & off campus	\$0
N/A	In Progress	Medium	c) Negotiate with each college bookstore to promote and sell alumni merchandise and books by alumni authors	\$0
N/A	In Progress	Medium	d) Update the ESC website and alumni page to include additional links/information about the Alumni Association, its benefits and programs	\$0
N/A	In Progress	Medium	e) Promote awareness and participation in the Association via on-campus outlets (TV slides, posters/flyers in student center, library, bookstore)	\$0
N/A	In Progress	Medium	f) Prepare and send press releases/newsletters concerning notable alumni, Alumni Association programs and/or opportunities for involvement	\$0
N/A	In Progress	Medium	g) Submit Alumni Association articles for inclusion in foundation and college publications	\$0
N/A	In Progress	Medium	h) Attend Chamber of Commerce, Rotary and other community meetings & events, to promote the Alumni Association, locate "lost" alumni and recruit mentors	\$0
N/A	In Progress	Medium	i) Initiate a Distinguished Alumni Award – introduce at Celebration of Excellence	\$0
N/A	In Progress	Medium	j) Identify and cultivate key alumni prospects – invite to college events and outings	\$0

#### Assessment Measures

Date	Assessment Measure
08/03/2011	Social Media: Facebook Friends
08/03/2011	Attendance at Alumni-Specific, Signature events
08/03/2011	Alumni attendance at Career Events
08/03/2011	Alumni Perception of Relevance Survey Results (items associated with communications and media: newsletters, slides, webpage)
08/03/2011	Alumni Association membership

#### Intended Results



Date	Intended Results
08/03/2011	By the end of the 2011-2012 academic year, paid membership in the Alumni Association will have increased by 10%
08/03/2011	By the of the 2011-2012 academic year, 2% of graduates from the past six years will be Facebook friends
08/03/2011	By the end of the 2011-2012 academic year, we will have established a baseline data point for future participation rates
08/03/2011	By the end of the 2011-2012 academic year, we will know which aspects of communications and programming are effective and relevant to alumni

## Status Reports

Report Date	Status Report
1/17/2012	Received Google Analytics data re: visits to Alumni Association webpage. For the second week of January alone, the Alumni Association had 148 pageviews, the largest % of views on the Foundation's website. We believe this traffic is driven by Facebook and the Alumni Directory project. As the attached document indicates, we had 133 unique visitors, over 2 minutes on the site on average, with visitors from 7 countries.
1/16/2012	Contracted with Harris Connect Publishing on 9/26/11 to research alumni data and publish first-ever Alumni Directory. ESC database sent 11/17/11; photos and text sent 12/11; Harris research began 12/30/11; research to be complete by 4/12; directory to be published in July or August 2012.
1/16/2012	Campus presence -- designed and printed 10 alumni association posters to promote membership on each campus
1/16/2012	Hosted lunch and Alumni Association/FB nursing tab introduction for nurses taking NCLEX predictor exam on 12/14/11.
1/16/2012	Formalized alumni association relationship to Foundation (see attached by-laws) in order to enter into contracts with affinity partners.
10/18/2011	<p>a) As of 9/30/11-- Alumni membership materials available on Lee Campus - Walker Hall, Taeni Hall, Rush Library and Alumni Office; Charlotte Campus - Student Life, Student Services areas; Collier Campus - Student Services and Foundation offices; Hendry-Glades Center - Student Services/Welcome area</p> <p>b) As of 9/30/11 -- Procured alumni keytags, mugs, post-it notes, mousepads, pens, nursing badges, event-specific items</p> <p>c) As of 8/15/11-- Lee Campus bookstore now selling alumni merchandise (three colors/three styles of t-shirts, license plate frames), and 2 alumni author books; manager working with other bookstores to do the same</p> <p>d) As of 10/15/11-- Website updated to add upcoming events, benefits with links to community partners, link to first alumni newsletter</p> <p>e) Ongoing -- Promoting alumni association throughout each campus via membership brochures, participation in student life and career services programs, including Project HOPE presentation (8/2/11)</p> <p>f) Promoting alumni events via</p>
10/18/2011	<p>g) Articles and photos submitted for college/foundation Fall 2011 newsletter (10/14/11)</p> <p>h) Alumni Coordinator attends monthly Chamber luncheons, Women in Business, Business After Hours and Ambassador events; Director attends American Business Women's Assn. (6/21/11, 8/16/11 &amp; 10/4/11), Cape Coral Community Foundation (9/6/11), Horizon Council Business Awards, Veterans events (10/2/11)</p> <p>i) Event to be determined during 50th anniversary year. Honoring Association of Florida College's selection for Distinguished Alumni Award -- Edison alumna Maria Cardenas (10/27/11)</p> <p>j) Invited alumni to speak at Alumni Author Book Signing event (6/29/11); Student Leadership Conference alumni panel (9/23/11); foursome at Chamber of Commerce Golf Tournament (10/14/11); VIP event at Everblades Game (10/15/11); discount tickets to POPS Concert (10/22/11)</p>

## Actual Results

Date	Actual Results
01/13/2012	Social Media: Facebook Page -- 182 friends Added Nursing School Alumni Tab to FB page -- December 2011; 133 graduates took the NCLEX Predictor Exam
01/13/2012	Alumni Association Membership -- 193 total  * Individuals -- 166 * Joint -- 16 * Lifetime -- 9 * Lifetime Joint -- 2  The Alumni Association surveyed current students (10/20/11) to assess interest in a Student Alumni Club.
01/13/2012	Perception of Relevance Survey completed -- 585 respondents; Document uploaded below
01/16/2012	Alumni Today 50th Anniversary Alumni Directory -- as of 1/10/12 -- 1,067 alumni updates; 257 directory purchases
01/17/2012	Career Services -- Per Dr. Kennedy, the Job Fair on 10/5/11 attracted 758 participants, 258 of whom were students. The remaining 500 were community members.
01/17/2012	Google Analytics results from Foundation/Alumni website attached.
10/18/2011	Social Media: Facebook Friends -- 115 friends
10/18/2011	Attendance at Alumni Events  * Larry Shortell Alumni Book Signing -- 22 * Student Leadership Conference -- 4 alumni panelists, 8 students * Chamber of Commerce Golf Tournament -- 4 alumni golfers, on-site sponsorship signage seen by 156 golfers & volunteers; weekly email Chamber newsletters with sponsorship promotion * Everblades sponsorship game -- 200 students, 24 alumni & friends, distributed 310 alumni promotional items; 5,182 overall attendance -- intermission alumni association promo & game tickets; 7,700 daily motorists for marquis signage on I-75 x 3 weeks
10/18/2011	Perception of Relevance Survey -- 537 respondents to date
10/18/2011	Alumni Association membership -- 170 total  * Individuals -- 144 * Joint -- 16 * Lifetime -- 8 * Lifetime Joint -- 2

## Use of Results

Date	Use of Results
01/12/2012	Alumni Association Membership --Our various initiatives to locate and engage alumni are working exactly according to plan. The initial data cleansing (Fall 2010), followed by the data cleansing via the Alumni Directory (Winter 2011-12), have produced thousands of contacts previously untouched (see uploads). Connections via Facebook and now the dedicated Nursing Alumni Tab have enabled us to promote membership, provide updates on alumni events and activities, college and 50th anniversary events, career opportunities and highlights of notable alumni achievements.
01/16/2012	Perception of Relevance Survey -- The results of the survey were illuminating. We are still assessing how best to utilize the results. The order of interest of alumni services and benefits will dictate some shifting of priorities for the association. For example, we may need to place more emphasis on the top 3 services noted: Campus Library Research Sources, Discounts on Continuing Education classes and Career Services. The list of communications modes was very affirming of how we are currently conducting business.
01/17/2012	Career Services -- Although the Alumni Association promoted the Job Fair on 10/5/11 to local alumni, and 500 community members attended, we were not able to track how many attended as a result of our promotion. For the upcoming Career Services events in February and April, we will attempt to track alumni participation. Career Services support is one of the top 3 alumni services requested.
01/17/2012	Strong percentage usage of alumni on Foundation website could advocate for alumni to have its own separate website.

#### Gap Analysis

There are no Gap Analyses Results to Display

#### SWOT Analysis

There are no SWOT Analyses Results to Display

#### Units Impacted

There are no Units Impacted to Display

#### Associated Standards

There are no Associated Standards to Display

#### Associated Outcomes

<b>Unit Code:</b>	<b>Planning Unit:</b>	<b>Unit Manager</b>
08312011	Foundation - Development	Miller, Kevin

### Unit Purpose

There is no Unit Purpose to Display

### Unit Goals

There are no Unit Goals to Display

Obj ID	Objective	Objective Purpose	Objective Status
1451	Major Gifts Development	Operational Outcome	Approved

### Objective Description

Once established, the major gifts department will develop strategies, prospect information, and relationships required to increase contributions to the College (Devon, Inc., 2011, pg. 9)

Institutional Goals	Objective Types	Planning Priorities
A. Allocate financial resources aligned with College priorities	No Objective Types to Display	No Planning Priorities to Display
A. Develop a strategy to capitalize on our partnerships (Internal & External)		

### Tasks

Due Date	Status	Priority	Task	Budget Amount
10/31/2011	In Progress	High	Run full database, including prospects , through a wealth screening, to ensure proper ranking of major gift prospects.	\$0

### Assessment Measures

Date	Assessment Measure
08/23/2011	Prospect Reports from Raisers' Edge
08/23/2011	Staff Evaluations
08/23/2011	Report of gifts at the \$100,000 level
08/23/2011	Report of gifts at the \$10,000 level

### Intended Results

Date	Intended Results
08/23/2011	By the end of the 2011-2012 planning cycle, the foundation will increase the number of qualified prospects by 20% over the 2010-2011 baseline
08/23/2011	By the end of the 2011-2012 planning cycle, 50% of the qualifying information concerning major gift prospective donors will be complete and current (updated within the past 12 months)
08/23/2011	By the end of the 2011-2012 planning cycle, all staff associated with major gifts will meet or exceed expectations on evaluation items associated with major gifts (with 75% of staff exceeding expectations on these items)
08/23/2011	By the end of the 2011-2012 planning cycle, the Foundation will increase the number of gifts at this level by 5% over the 2010-2011 baseline
08/23/2011	By the end of the 2011-2012 planning cycle, the Foundation will increase the number of gifts at this level by 5% over the 2010-2011 baseline

### Status Reports

Report Date	Status Report
10/18/2011	<p>The baseline results for 10/11 on which we will assess this years success is as follows: 25 gifts of \$10,000 - \$99,000</p> <p>To date we have received 5 gifts \$10,000 - \$99,000.</p> <p>This puts us on track to exceed our goal of increasing the 25 by 5%.</p>
10/18/2011	<p>The baseline results for 10/11 on which we will assess this years success is as follows: 7 gifts of \$100,000</p> <p>To date we have received 3 gifts \$100,000 .</p> <p>This puts us on track to exceed our goal of increasing the 7 by 5%.</p>
10/18/2011	<p>The Foundation is currently engaged in its first official wealth screening and prospect ranking initiative. This will assist us the successful completion of goals #1 &amp; #2. The screening will be complete by October 31 and the ranking will begin in November running through the first of the year (2012).</p>

#### Actual Results

Date	Actual Results
01/17/2012	To date we have realized \$2,281,400 from 9 gifts of \$100k or more and \$410,064 from 16 gifts of \$10k - \$99k.

#### Use of Results

Date	Use of Results
01/17/2012	These gifts come from a variety of major gifts and constituent types representing a wide range of our geographical service area. We will be analyzing these results and those that come in the future to determine trends which will guide our future efforts.

#### Gap Analysis

There are no Gap Analyses Results to Display

#### SWOT Analysis

There are no SWOT Analyses Results to Display

#### Units Impacted

There are no Units Impacted to Display

#### Associated Standards

There are no Associated Standards to Display

#### Associated Outcomes

Obj ID	Objective	Objective Purpose	Objective Status
1452	Annual Fund Development	Operational Outcome	Approved

#### Objective Description

Once established, the comprehensive suite annual fund efforts will enhance the Foundations capacity to develop new donors, foster greater community interest in the College, and enhance the amount of contributions made to the college

**Institutional Goals**

A. Allocate financial resources aligned with College priorities

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A. Develop a comprehensive marketing plan for the College

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A. Develop a strategy to capitalize on our partnerships (Internal & External)

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**Objective Types**

No Objective Types to Display

**Planning Priorities**

No Planning Priorities to Display

**Tasks**

Due Date	Status	Priority	Task	Budget Amount
10/31/2011	In Progress	Medium	As a part of the database wealth screening, nearly 10,000 prospects are being included to assist in identifying new annual prospThis process will be completed by October 31 to allow for the first solicitation by Dec. 31, 2011	\$0

**Assessment Measures**

Date	Assessment Measure
08/23/2011	Prospects Reports from Raisers' Edge
08/23/2011	Event documentation
08/23/2011	Report of Annual Fund gifts (Raisers' Edge)

**Intended Results**

Date	Intended Results
08/23/2011	By the end of the 2011-2012 planning cycle, the Foundation will increase the number of qualified, prospective, annual donors by 10% over the 2010-2011 baseline
08/23/2011	By the end of the 2011-2012 planning cycle, the number of documented attendees as foundation events will increase by 5% over the 2010-2011 baseline (expressed as a ratio of attendees per event)
08/23/2011	By the end of the 2011-2012 planning cycle, the Foundation will increase the number of donors that support the annual fund by 10% over the 2010-2011 baseline

**Status Reports**

Report Date	Status Report
10/18/2011	First annual fund mailing of 2011 is drafted and submitted to the mailhouse for final layout and printing. Expected delivery is mid-november 2011.
10/18/2011	First events of academic year 2011-12 are occurring October 2011. Attendance data will be added by mid-november.

**Actual Results**

Date	Actual Results
01/17/2012	The fall 2011 Annual Fund appeal mailing finally went out in November. Over 7000 appeal letters went out at a cost of \$2,800. To date we have received 19 gifts back for a total of about \$1,900.

**Use of Results**

Date	Use of Results
01/17/2012	The Foundation's Development Team has been analyzing the results of the fall appeal. We ascribe the low response to date to the terrible publicity the college has been experiencing.

**Gap Analysis**

There are no Gap Analyses Results to Display

**SWOT Analysis**

There are no SWOT Analyses Results to Display

**Units Impacted**

There are no Units Impacted to Display

**Associated Standards**

There are no Associated Standards to Display

**Associated Outcomes**

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<b>Unit Code:</b>	<b>Planning Unit:</b>	<b>Unit Manager</b>
001123	Government Relations	Holliday, Matthew

### Unit Purpose

There is no Unit Purpose to Display

### Unit Goals

There are no Unit Goals to Display

Obj ID	Objective	Objective Purpose	Objective Status
1545	Higher Education System Governance	Operational Outcome	Pending Approval

### Objective Description

For the past several years, there has been significant debate about the governance of higher education in Florida. With the growth of the Florida College System and the expansion of many of the colleges into baccalaureate offerings, questions of program delivery, which system should be delivering what program levels, allocation of resources, efficient delivery and local control, among others, have emerged.

It is anticipated efforts will be made in the 2012 legislative session to modify in some way the governance of the Florida College System and the 28 colleges under the control of the State Board of Education.

The outcome of this initiative will largely be determined by what the Florida legislature decides to do with governance. Edison State College, as one of the larger baccalaureate granting colleges, will be a contributor to the debate and policy discussion in seeking a solution to the governance questions above and as yet to be determined.

Institutional Goals	Objective Types	Planning Priorities
A. Develop a strategy to capitalize on our partnerships (Internal & External)	No Objective Types to Display	No Planning Priorities to Display
B. Create and advocate the legislative agenda while including our partners		
B. Expand Edison State Colleges engagement in the region		

### Tasks

There are no Tasks to Display

### Assessment Measures

There are no Assessment Measures to Display

### Intended Results

There are no Intended Results to Display

### Status Reports

There are no Status Reports to Display

### Actual Results

There are no Actual Results to Display

### Use of Results

There are no Use of Results to Display

### Gap Analysis

There are no Gap Analyses Results to Display

### SWOT Analysis



There are no SWOT Analyses Results to Display

Units Impacted

There are no Units Impacted to Display

Associated Standards

There are no Associated Standards to Display

Associated Outcomes

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Obj ID	Objective	Objective Purpose	Objective Status
1546	Adequate funding of the Florida College System	Operational Outcome	Pending Approval

Objective Description

The Florida College System has grown by more than 40,000 students between 2006-07 and 2011-12 while state funds have decreased by 29% (FCS Legislative Priorities, 2012). Despite the state's dire financial condition, the Florida College System has continued to meet the needs of students and remained committed to access and affordability.

For the 2012 legislative session, we will once again deliver a message of "Fund our Growth". The State Board of Education is seeking an increase in the college system budget of \$74.4 million to fund the continued growth in our system (Florida College System Legislative Priorities, 2012).

Edison State College will advocate for this "continuation" funding in the 2012 legislative session. Failure by the legislature to meet this need will result in another decrease in per student funding at Edison and the 27 other colleges.

As the state fiscal outlook continues to be revised with lower revenues, a deficit is again a possibility in the state budget. In the event level funding is not possible, we will seek to minimize the impact of the expected reduced appropriations available to Edison State College and the Florida College System.

Institutional Goals	Objective Types	Planning Priorities
A. Develop a strategy to capitalize on our partnerships (Internal & External)	No Objective Types to Display	No Planning Priorities to Display
B. Create and advocate the legislative agenda while including our partners		
B. Expand Edison State Colleges engagement in the region		

Tasks

Due Date	Status	Priority	Task	Budget Amount
11/08/2011	In Progress	High	Present to the Lee County Legislative Delegation at their annual hearing in Ft. Myers the legislative priorities of Edison State College and the Florida College System, including the need and rationale behind the system's funding request, as approved by the State Board of Education.  This is the final formal meeting (Collier and Charlotte county legislative delegations met previously this summer) at which Edison State College will present to the local delegations as a body our legislative priorities before entering the session. During the coming committee weeks and into session, we will remain in close contact with the local delegations to ensure our message is received.	\$0
01/10/2012	In Progress	High	Complete individual meetings with local delegation members to discuss impact of funding on Edison State College. For those who have not been contacted by this date, establish contact with legislative staff if possible.  Priority will be given to local delegation members sitting in Higher Education Appropriations committees.	\$0
03/09/2012	In Progress	High	Monitor budget documents as they are produced and advocate for the FCS funding position. Maintain communications with ESC budget staff to ensure college is briefed on appropriations outlook.	\$0

#### Assessment Measures

Date	Assessment Measure
09/26/2011	The final assessment on this initiative will be the level of funding the Florida College System receives and how that relates to Edison State College's funding level.

#### Intended Results

Date	Intended Results
09/26/2011	The ideal intended result would be avoiding a reduction in Edison State College's per FTE funding level. As one of the highest growth colleges in the FCS, Edison has experienced significant reductions in the per FTE funding.  The intended result of this initiative will be to seek maximum funding for the Florida College System, and Edison State, through advocacy with the Florida Legislature.

#### Status Reports

There are no Status Reports to Display

#### Actual Results

There are no Actual Results to Display

#### Use of Results

There are no Use of Results to Display

#### Gap Analysis

There are no Gap Analyses Results to Display

#### SWOT Analysis

There are no SWOT Analyses Results to Display

#### Units Impacted

There are no Units Impacted to Display

#### Associated Standards

There are no Associated Standards to Display

**Associated Outcomes**

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<b>Unit Code:</b>	<b>Planning Unit:</b>	<b>Unit Manager</b>
001142	Human Resources	Etheridge, Bonnie

### Unit Purpose

There is no Unit Purpose to Display

### Unit Goals

There are no Unit Goals to Display

Obj ID	Objective	Objective Purpose	Objective Status
1466	New Hire Orientation Re-Design	Operational Outcome	Approved

### Objective Description

By the end of the calendar year, HR will employ the results of the 2009-2010 unit plan (outcome ID 1142) to implement and refine a one-day orientation. This orientation will provide new hires with information and learning experiences that are relevant, reflective of organizational procedures, personnel responsibilities, and technology uses.

Institutional Goals	Objective Types	Planning Priorities
C. Engage faculty and staff to create a comprehensive plan that will provide the necessary technolog	No Objective Types to Display	No Planning Priorities to Display

Tasks				
Due Date	Status	Priority	Task	Budget Amount
02/01/2012	In Progress	High	Implement Recent Employee Orientation Survey	\$0
05/01/2012	In Progress	High	Apply survey results to developmental process for orientation activities, information, and necessary resources	\$0

### Assessment Measures

Date	Assessment Measure
08/31/2011	Table of relevant departments with agreement dates (and copies)
08/31/2011	New Employee Survey

### Intended Results

Date	Intended Results
01/17/2012	By 2/10/12, VPHR has approval of Cabinet.
08/31/2011	Due to the changes in leadership, this plan was put on hold. With new leadership in place, this plan is reactivated and by 02/15/12, Human Resources will meet with all new leadership to insure continued commitment to participate in new orientation. Goal of meeting will be for department areas that facilitate new hire training sessions to submit written agreements to HR; these agreements will identify facilitators, indicate an awareness of scheduled orientation days, and availability of relevant staff
08/31/2011	In April 2012, the first day long orientation will be held and 90% of relevant new hires will have participated, as well as 95% of relevant departments will have provided qualified facilitators.
08/31/2011	By the end of the 11-12 fiscal year, results of new employee survey will indicate 85% of the new employees found the orientation to be helpful to extremely helpful

### Status Reports

Report Date	Status Report
11/7/2011	Coordinator Benefits and Training continuing to meet with subcommittee to plan orientation. On target.

**Actual Results**

Date	Actual Results
01/13/2012	Subcommittee has completed their work, and the final draft plan of the new hire orientation agenda has been forwarded to VPHR for presentation to the Executive Cabinet.

**Use of Results**

There are no Use of Results to Display

**Gap Analysis**

There are no Gap Analyses Results to Display

**SWOT Analysis**

There are no SWOT Analyses Results to Display

**Units Impacted**

There are no Units Impacted to Display

**Associated Standards**

There are no Associated Standards to Display

**Associated Outcomes**

Obj ID	Objective	Objective Purpose	Objective Status
1467	Performance Evaluation Analysis and Training	Operational Outcome	No Status Selected

**Objective Description**

As partnerships with departmental managers are established fully, Human Resources will facilitate the timely completion of exempt and non-exempt staff evaluations. These will yield actionable information concerning training needs and problem resolution processes.

Institutional Goals	Objective Types	Planning Priorities
No Institutional Goals to Display	No Objective Types to Display	No Planning Priorities to Display

Tasks				
Due Date	Status	Priority	Task	Budget Amount
10/10/2011	Complete	High	Prepare a list of staff evaluations for completion and communicate with appropriate supervisors.	\$0
03/01/2012	In Progress	High	Prepare a list of Administrative evaluations for completion and communicate with appropriate supervisors.	\$0
06/15/2012	In Progress	Medium	Begin analyzing results of staff evaluations and identify training opportunities.	\$0

**Assessment Measures**

Date	Assessment Measure
08/31/2011	Roster of expected administrative staff evaluations.
08/31/2011	Roster of non-administrative staff evaluations
08/31/2011	Application of evaluation results.

**Intended Results**

Date	Intended Results
08/31/2011	By the end of the 2011-2012 fiscal year, the percentage of completed administrative staff evaluations submitted by the yearly deadline will increase by 90% over the 2010-2011 base-line compliance levels.
08/31/2011	By the end of the 2011-2012 fiscal year, the percentage of completed non-administrative staff evaluations submitted by the yearly deadline will increase by 10% over the 2010-2011 base-line compliance levels.
08/31/2011	By the end of the 2011-2012 fiscal year, at least three (3) new Employee Development/Training proposals will be directly tied to staff evaluations results.

#### Status Reports

Report Date	Status Report
1/17/2012	Review of submitted evaluations is in process to identify areas for training.
10/31/2011	A list of supervisors was created and all supervisors were notified via email of annual evaluations due for their employees on 10/10/11. Evaluations due back November 1, 2011.

#### Actual Results

Date	Actual Results
01/13/2012	As of December 16, 2011 HR had received 203 of the 356 evaluations due which is 57% received. Last year at this time, 176 of 326 had been recieved. That was 54%. Therefore, we are 3% above last year.
01/17/2012	Adminstrative evaluations are not due until March 15, 2012.

#### Use of Results

Date	Use of Results
01/13/2012	As the targeted goal of 10% improvement has not been attained, the VPHR will send notifications to supervisors and their supervisors with a deadline of 2/17/12 for completed evaluations.

#### Gap Analysis

There are no Gap Analyses Results to Display

#### SWOT Analysis

There are no SWOT Analyses Results to Display

#### Units Impacted

There are no Units Impacted to Display

#### Associated Standards

There are no Associated Standards to Display

#### Associated Outcomes

<b>Unit Code:</b>	<b>Planning Unit:</b>	<b>Unit Manager</b>
001153	Information Technology	Bronder, Lori

### Unit Purpose

To advance the mission of Edison College by providing innovative technology services that clearly and reliably support teaching and learning.

### Unit Goals

There are no Unit Goals to Display

Obj ID	Objective	Objective Purpose	Objective Status
1302	Pilot Program-Desktop Virtualization	Operational Outcome	Implementing

### Objective Description

PILOT PROGRAM-Once Desktop Virtualization is complete, IT will facilitate decreases in money and time required to deploy and update software. Achieving this outcome will prove the feasibility of Virtualization across all aspects of campus computing

Institutional Goals	Objective Types	Planning Priorities
C. Engage faculty and staff to create a comprehensive plan that will provide the necessary technolog	No Objective Types to Display	* Provide an array of effective student support serv

Tasks				
Due Date	Status	Priority	Task	Budget Amount
10/28/2011	Complete	High	Identify pool of test computers for the Lee Campus Library.	\$0
11/04/2011	Complete	High	contract external company to determine configuration the virtual environment.	\$0
12/16/2011	In Progress	High	List requirements for software and hardware. Obtain quotes.	\$0
01/31/2012	Incomplete	High	Order and receive equipment and software.	\$0
03/30/2012	Incomplete	High	Configure desktop virtualization on selected computers.	\$0
03/30/2012	Incomplete	Medium	Determine survey items and targeted population for assessment of satisfaction.	\$0
05/31/2012	Incomplete	High	Conduct survey.	\$0

### Assessment Measures

Date	Assessment Measure
06/17/2011	Project Punch-list
07/15/2011	Pilot PC survey results
07/15/2011	Follow-up planning process

### Intended Results

Date	Intended Results
06/17/2011	By January 31, 2011 Virtualization will be implemented in all selected computers.
07/15/2011	By the end of May 2012, 85% of all surveyed students will indicate satisfied or very satisfied with the virtual environment
07/15/2011	By the end of the 2011-2012, an implementation plan for district-wide deployment of virtualization will be approved the appropriate academic and administrative units

**Status Reports**

Report Date	Status Report
10/18/2011	the contractor has designed the virtual enviroment and Network Services is working with vendors to obtain the necessary quotes

**Actual Results**

There are no Actual Results to Display

**Use of Results**

There are no Use of Results to Display

**Gap Analysis**

There are no Gap Analyses Results to Display

**SWOT Analysis**

There are no SWOT Analyses Results to Display

**Units Impacted**

Date	Unit Code	Planning Unit	Unit Manager
10/18/2011	001233	Learning Resources and Undergraduate Research	Shuluk, William

**Associated Standards**

Standard Number	Standard Description
3.8.1	The institution provides facilities and learning/information resources that are appropriate to support its teaching, research, and service mission. (Learning/information resources)

**Associated Outcomes**

Obj ID	Objective	Objective Purpose	Objective Status
1303	Implement Redundant Failover Technology for Central IT Services: Phase I Oracle Database Reproduction	Operational Outcome	Approved

**Objective Description**

This multi-year project will result in redundant failover technology for central IT services. Phase I wil result in on-site redundancy and failover for Oracle Database. Achieving this outcome will ensure the institution's ability to maintain its business and academic services and conduct crisis communications when some circumstance disrupts normal operations.

Institutional Goals	Objective Types	Planning Priorities
C. Engage faculty and staff to create a comprehensive plan that will provide the necessary technolog	No Objective Types to Display	* Identify and develop short and long-term financial

**Tasks**



Due Date	Status	Priority	Task	Budget Amount
11/15/2011	Incomplete	High	Design the Oracle database reproduction	\$0
11/30/2011	Incomplete	High	Obtain quotes for the system components	\$0
12/05/2011	Incomplete	High	Place current-year funded orders to purchase system components	\$0
03/15/2012	Incomplete	High	Implement the test instance for the on-site, redundant system	\$0
03/30/2012	Incomplete	High	Develop Phase II plan for Redundant Failover Technology Services for Central IT Services project to request additional funds through the College planning and budget development process.	\$0
05/30/2012	Incomplete	High	Conduct a test of the new system	\$0
06/15/2012	Incomplete	High	Move the test system into the production environment	\$0

### Assessment Measures

Date	Assessment Measure
07/22/2011	Successful test of system prior to going live with production system
07/22/2011	Successful implementation of production system
10/21/2011	Update related procedures and guidelines

### Intended Results

Date	Intended Results
06/17/2011	By the end of June 2012, on-site Oracle database reproduction will be fully implemented
07/22/2011	By the end of June 2012, related internal procedures and guidelines will be updated and approved by Mr. Steve Nice

### Status Reports

Report Date	Status Report
12/1/2011	By the end of March 2012, the Phase II plan for the project will be complete and submitted
12/1/2011	Oracle database reproduction test results report
10/21/2011	Oracle database reproduction design has been submitted for approval by Mr. Steve Nice
10/21/2011	In process: Obtaining quotes for system components

### Actual Results

There are no Actual Results to Display

### Use of Results

There are no Use of Results to Display

### Gap Analysis

There are no Gap Analyses Results to Display

### SWOT Analysis

There are no SWOT Analyses Results to Display

### Units Impacted

Date	Unit Code	Planning Unit	Unit Manager
10/21/2011	001146	Facilities Planning	Nice, Steve
10/21/2011	001143	Financial Services	Doeble, Gina
12/01/2011	201247	Banner Applications	Dudley, Jason

**Associated Standards****Standard Number      Standard Description**

3.11.1	The institution exercises appropriate control over all its physical resources. (Control of physical resources)
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**Associated Outcomes**

Obj ID	Objective	Objective Purpose	Objective Status
1326	Identify, develop and implement IT security policies, procedures and strategies.	Operational Outcome	Implementing

**Objective Description**

Identify, develop and implement a comprehensive security solution that addresses technology, people and processes. Achievement of this goal will ensure that the College protects its information assets and is in compliance with state and federal regulations.

**Institutional Goals**

C. Engage faculty and staff to create a comprehensive plan that will provide the necessary technolog

**Objective Types**

No Objective Types to Display

**Planning Priorities**

\* Provide an array of effective student support serv

**Tasks**

Due Date	Status	Priority	Task	Budget Amount
06/24/2011	Complete	High	Identify 5 finalists for Security Administrator position	\$0
06/01/2011	Complete	High	Post new Security Network Administrator position opening	\$0
06/20/2011	Complete	High	Implement new Portal Security Question / Answer and Alternate email security enhancements	\$0
07/15/2011	Complete	High	Hire new Security Network Administrator	\$0
10/28/2011	Complete	High	Implement new 50 Mb internet connection and reconfigure firewall.	\$0
11/25/2011	In Progress	High	Develop group policies for the Lee Campus Library	\$0
11/25/2011	Incomplete	High	Develop group policies for the Lee Campus	\$0
11/25/2011	In Progress	High	Develop new technology user checklist	\$0
11/30/2011	In Progress	High	Develop change control application.	\$0

**Assessment Measures**

Date	Assessment Measure
07/22/2011	IT Security Assessment
07/22/2011	Updated IT procedures, processes and guidelines

**Intended Results**

Date	Intended Results
06/17/2011	By the end of May 2012, a security plan will be implemented.
07/22/2011	By the end of May 2012, updated IT policies, procedures and guidelines to ensure secure IT services will be fully implemented.

**Status Reports**

Report Date	Status Report
10/18/2011	Programming completed for change control application. Product is in testing.

**Actual Results**

There are no Actual Results to Display

**Use of Results**

There are no Use of Results to Display

**Gap Analysis**

There are no Gap Analyses Results to Display

**SWOT Analysis**

There are no SWOT Analyses Results to Display

**Units Impacted**

There are no Units Impacted to Display

**Associated Standards**

Standard Number	Standard Description
3.11.2	The institution takes reasonable steps to provide a healthy, safe, and secure environment for all members of the campus community. (Institutional environment)

**Associated Outcomes**

<b>Unit Code:</b>	<b>Planning Unit:</b>	<b>Unit Manager</b>
00230	Payroll	Gonzalez, Mercy

### Unit Purpose

There is no Unit Purpose to Display

### Unit Goals

There are no Unit Goals to Display

Obj ID	Objective	Objective Purpose	Objective Status
1384	Implementation of Extender Paperless Project	Operational Outcome - New Initiative	Approved

### Objective Description

Once fully implemented, the Extender portion of the paperless environment project will provide all constituents with more efficient and secured access to documentation associated with financial services operations. This will decrease our need for storage space and promote efficiency in retrieving payroll records.

Institutional Goals	Objective Types	Planning Priorities
C. Engage faculty and staff to create a comprehensive plan that will provide the necessary technolog	No Objective Types to Display	* Enhance the regional image of Edison State College Identify and develop short and long-term financial

Tasks				
Due Date	Status	Priority	Task	Budget Amount
07/29/2011	In Progress	High	In conjunction with Banner Support (Jason Dudley), ensure that all required imagine equipment ordered.	\$0
01/31/2012	In Progress	High	Ensure all necessary documents are scanned and indexed concurrent with current Fiscal Year.	\$0

### Assessment Measures

Date	Assessment Measure
07/08/2011	Extender implementation checklist

### Intended Results

Date	Intended Results
07/08/2011	By October, 2011, all required imagining equipment will be installed, software will be tested, and staff will be trained

### Status Reports

Report Date	Status Report
10/17/2011	The Enterprise Application Team installed 2 imagers in the Payroll Department in October and software was tested. Currently working with EAS to schedule staff training before the end of October, so we can begin scanning and indexing current fiscal year documents by November.

### Actual Results

There are no Actual Results to Display

### Use of Results

There are no Use of Results to Display

### Gap Analysis

There are no Gap Analyses Results to Display

### SWOT Analysis

There are no SWOT Analyses Results to Display

### Units Impacted

There are no Units Impacted to Display

### Associated Standards

There are no Associated Standards to Display

### Associated Outcomes

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Obj ID	Objective	Objective Purpose	Objective Status
1385	Electronic W2 Project: Post Implementation	Assessment Outcome	Assessing

### Objective Description

Through implementing Banner Self-Service, the department will harness efficiency associated with automation as it provides compensation services. The improved quality of service will be demonstrated through cost savings, early availability of tax forms, easier approval processes, and reliable data recovery (in the event of a disaster).

### Institutional Goals

C. Engage faculty and staff to create a comprehensive plan that will provide the necessary technolog

### Objective Types

No Objective Types to Display

### Planning Priorities

\* Identify and develop short and long-term financial

### Tasks

Due Date	Status	Priority	Task
08/09/2011	In Progress	High	Improve consent of end user through the marketing and communication department release announcement (EDISON STATEments).

### Assessment Measures

Date	Assessment Measure
02/29/2012	2011 Tax form PO and 2012 Tax form PO
02/29/2012	Free form employee feed-back (via e -mails, memos, or letters)
02/29/2012	Exlectronic W2 participation reports from Banner for 2012
07/08/2011	Banner report from 2011 and 2012 with form availability dates

### Intended Results

Date	Intended Results
02/29/2012	By the end of the January 2012, tax forms will distributed to all employees one week earlier than 2011
02/29/2012	By the end 2011-2012 fy, we expect diminish the cost of the program by 90%
07/08/2011	By the end of the 2011-2012 fiscal year, 90% of all ESC employees to provide consent to receive W2's electronic (marketing and communications will be involved); NOTE: only 5% of employees consented by the end of 2010-2011

### Status Reports

Report Date	Status Report
1/11/2012	Human Resources now include W2 Consent election on the New Hire Packet, which enables us to capture in coming employees. We will continue to provide communication to employees through Edison Statements and College Announcement.
10/17/2011	The Payroll Department continues reminding employees to provide consent to receive electronic W-2 through District Wide newsletter (Edison Statements). NOTE: currently 6% of employees consented at end of first quarter of fiscal year 2011 – 2012

#### Actual Results

There are no Actual Results to Display

#### Use of Results

There are no Use of Results to Display

#### Gap Analysis

There are no Gap Analyses Results to Display

#### SWOT Analysis

There are no SWOT Analyses Results to Display

#### Units Impacted

Date	Unit Code	Planning Unit	Unit Manager
01/11/2012	001142	Human Resources	Etheridge, Bonnie
01/11/2012	201247	Banner Applications	Dudley, Jason

#### Associated Standards

There are no Associated Standards to Display

#### Associated Outcomes

Obj ID	Objective	Objective Purpose	Objective Status
1386	Banner Leave Time and Web Time Implementation Checklist	Operational Outcome - New Initiative	Approved

#### Objective Description

Banner Leave Time and Web Time Implementation - implementation of Banner self service outcome will expedite and accelerate availability of tax forms, expedite approvals and provide reliable data recovery in event of disaster

Institutional Goals	Objective Types	Planning Priorities
A. Allocate financial resources aligned with College priorities	No Objective Types to Display	* Identify and develop short and long-term financial
C. Engage faculty and staff to create a comprehensive plan that will provide the necessary technolog		Enhance the regional image of Edison State College

Tasks				
Due Date	Status	Priority	Task	Budget Amount
02/29/2012	In Progress	High	Goal B – Schedule training sessions on all campuses and complete training manuals for approvers, proxies, student assistants and part time hourly employees	\$0
12/31/2011	In Progress	High	Goal A – In conjunction with Banner HR/PR Liason (Leslie Ryder) develop Banner Leave Time and Web Time implementation checklist and setup module.	\$0

**Assessment Measures**

Date	Assessment Measure
07/08/2011	Goal A - To the extent that 100% of all check-list items are marked as complete
07/08/2011	Goal B - Scheduled workshops for participants attendance sheets
07/08/2011	Goal C - Results of Leave Time and Web Time Training Satisfaction Survey
07/08/2011	Goal D - Banner Audit Report (canned)

**Intended Results**

Date	Intended Results
07/08/2011	Goal A - By December 2011, Banner Leave Time and Web Time Entry Modules will be implemented.
07/08/2011	Goal B - By March 2012, the department will have documentation indicating that all approvers and proxies participated in training sessions; in addition to Student Assistants and part time hourly employees
07/08/2011	Goal C - By April 2012, 80% of the training participants will indicate that they found the training relevant, useful, and timely
07/08/2011	Goal D - By July 2012, Banner Audit reports will indicate that 80% of leave time requests and approvals were conducted through the automated processes correctly

**Status Reports**

Report Date	Status Report
10/19/2011	EAS (Leslie Ryder) and Payroll have built the necessary tables in a Banner test module and have completed testing using sever class of employees (ex Students, part time and non-exempt). WTE moves the record keeping, currently provided on paper for approximately 510 employees, to an on-line, automated process and enables employees to view time history. We are currently working with HR on the approval routing.

**Actual Results**

There are no Actual Results to Display

**Use of Results**

There are no Use of Results to Display

**Gap Analysis**

There are no Gap Analyses Results to Display

**SWOT Analysis**

There are no SWOT Analyses Results to Display

**Units Impacted**

Date	Unit Code	Planning Unit	Unit Manager
01/11/2012	201247	Banner Applications	Dudley, Jason
01/11/2012	001142	Human Resources	Etheridge, Bonnie

**Associated Standards**

There are no Associated Standards to Display

**Associated Outcomes**


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<b>Unit Code:</b>	<b>Planning Unit:</b>	<b>Unit Manager</b>
00214	Procurement	Tudor, Lisa

### Unit Purpose

There is no Unit Purpose to Display

### Unit Goals

There are no Unit Goals to Display

Obj ID	Objective	Objective Purpose	Objective Status
1368	Banner Xtender Solutions	Operational Outcome	Approved

### Objective Description

By utilizing a component of the College's Banner Enterprise Data System called Banner Xtender Solutions, Procurement Services will be able to maintain and provide timely access to procurement records allowing for greater transparency in the management of public funds.

Institutional Goals	Objective Types	Planning Priorities
A. Allocate financial resources aligned with College priorities	No Objective Types to Display	No Planning Priorities to Display

Tasks				
Due Date	Status	Priority	Task	Budget Amount
08/31/2011	In Progress	Medium	Set up initial meeting with Banner Financial Liaison to occur before 8/31/11.	\$0
10/20/2011	In Progress	Medium	Meeting scheduled with Banner Financial Liaison 10/20/11. Meeting agenda to review tasks to be completed, set a preliminary timeline and ultimately to produce an implementation checklist. Meeting unable to be scheduled prior to 8/31/11 due to year end processes and new projects assigned.	\$0
10/21/2011	Complete	High	Met with Banner Financial Liaison on 10/21/11. See attached meeting agenda/minutes.	\$0
12/13/2011	Complete	High	Identified data fields to Banner Financial Liaison in order for the implementation checklist to be developed by Liaison as per attached document.	\$0

### Assessment Measures

Date	Assessment Measure
07/07/2011	Banner Xtender Solutions Procurement Services Implementation Checklist.
07/07/2011	Solicitation Prior Project List Checklist.

### Intended Results

Date	Intended Results
07/07/2011	By December 2012, Banner Xtender Solutions will be functional for Procurement Services and utilized for the most recently completed solicitation projects.
07/07/2011	By December 2014, Banner Xtender Solutions will contain historical solicitation documentation.

### Status Reports



Report Date	Status Report
12/13/2011	Unable to reach goal to have Banner Xtender Solutions functional for Procurement Services for the most recently completed solicitation projects by December 2012. In October 2011, met with Banner Financial Liaison. Agenda and minutes of the meeting are uploaded to TED system. On 12/13/11, the data fields needed to begin the building of the database were provided to the Banner Financial Liaison as per the document uploaded to the TED system entitled "Procurement Services, Procurement Database in Xtender". Will await Liaison to provide the implementation checklist (i.e. identify documents, purchase scanner, install scanner, test, etc...) Will check back with Liaison in January 2012. Would like to adjust date of goal outcome to June 2012 in order to have Banner Xtender Solutions functional and in use for Procurement.

#### Actual Results

There are no Actual Results to Display

#### Use of Results

There are no Use of Results to Display

#### Gap Analysis

There are no Gap Analyses Results to Display

#### SWOT Analysis

There are no SWOT Analyses Results to Display

#### Units Impacted

There are no Units Impacted to Display

#### Associated Standards

Standard Number	Standard Description
3.10.4	The institution exercises appropriate control over all its financial resources. (Control of finances)

#### Associated Outcomes

<b>Unit Code:</b>	<b>Planning Unit:</b>	<b>Unit Manager</b>
011463	Public Safety	Parfitt, Rick

### Unit Purpose

There is no Unit Purpose to Display

### Unit Goals

There are no Unit Goals to Display

Obj ID	Objective	Objective Purpose	Objective Status
1596	Staffing increase	Budget Outcome - New Initiative	Pending Approval

### Objective Description

To reclassify a current full time police officer to part time and to reclassify a current part time public safety officer to a part time police officer. This change would save \$5000.00 in benefits costs.

Institutional Goals	Objective Types	Planning Priorities
No Institutional Goals to Display	No Objective Types to Display	No Planning Priorities to Display

### Tasks

There are no Tasks to Display

### Assessment Measures

There are no Assessment Measures to Display

### Intended Results

There are no Intended Results to Display

### Status Reports

There are no Status Reports to Display

### Actual Results

There are no Actual Results to Display

### Use of Results

There are no Use of Results to Display

### Gap Analysis

There are no Gap Analyses Results to Display

### SWOT Analysis

There are no SWOT Analyses Results to Display

### Units Impacted

There are no Units Impacted to Display

### Associated Standards

There are no Associated Standards to Display

### Associated Outcomes

Obj ID	Objective	Objective Purpose	Objective Status
1598	Increase Public Safety on campus	Budget Outcome - New Initiative	Pending Approval

### Objective Description

With the addition of residential students to the Lee Campus in the fall of 2012, the need for greater public safety presence will be necessary to handle the increase in calls for service, crimes and other incidents that will come with 405 students living here 24/7. This is the first experience for ESC, which has always been a commuter college. Public Safety presence will need to increase to meet the demand for anticipated services and those services will need to include 24 hour police protection as well as more manpower that presently assigned.

Institutional Goals	Objective Types	Planning Priorities
No Institutional Goals to Display	No Objective Types to Display	No Planning Priorities to Display

### Tasks

There are no Tasks to Display

### Assessment Measures

Date	Assessment Measure
01/31/2012	The first housing building is being constructed and will house 405 students. This building is situated on the Lee campus and those students will be on campus property 24 hours a day, 7 days a week, whereas no as a commuter college the campus is closed at night and opened daily.
02/01/2012	With the increase in enrollment, especially with traditional age students, the public safety department has seen an increase in the number of calls for service as well as increases in some type of incidents, including thefts, behavior/conduct issues, traffic and others.

### Intended Results

Date	Intended Results																		
01/31/2012	<p>The residence building will be open to 405 students in August 2012. Before that time the Public safety department must increase staffing levels to meet the demand. The personnel, both law enforcement officers and non-sworn personnel must be trained and in place. The timeline is as follows.</p> <p>To have a position hired and start by:</p> <table> <tr> <td>(1) public safety officer</td><td>Start date: May 16</td></tr> <tr> <td>(1) police officer</td><td>Start date: May 16</td></tr> <tr> <td>(1) public safety officer</td><td>Start date: Jun 1</td></tr> <tr> <td>(1) police officer</td><td>Start date: Jun1</td></tr> <tr> <td>(1) police officer</td><td>Start date: Jun 18</td></tr> <tr> <td>(1) public safety officer</td><td>Start Date: Jun 18</td></tr> <tr> <td>(1) police officer</td><td>Start date: Jul 2</td></tr> <tr> <td>(1) public safety officer</td><td>Start date: Jul 2</td></tr> <tr> <td>(2) public safety officers</td><td>Start date: Jul 16</td></tr> </table>	(1) public safety officer	Start date: May 16	(1) police officer	Start date: May 16	(1) public safety officer	Start date: Jun 1	(1) police officer	Start date: Jun1	(1) police officer	Start date: Jun 18	(1) public safety officer	Start Date: Jun 18	(1) police officer	Start date: Jul 2	(1) public safety officer	Start date: Jul 2	(2) public safety officers	Start date: Jul 16
(1) public safety officer	Start date: May 16																		
(1) police officer	Start date: May 16																		
(1) public safety officer	Start date: Jun 1																		
(1) police officer	Start date: Jun1																		
(1) police officer	Start date: Jun 18																		
(1) public safety officer	Start Date: Jun 18																		
(1) police officer	Start date: Jul 2																		
(1) public safety officer	Start date: Jul 2																		
(2) public safety officers	Start date: Jul 16																		

### Status Reports

Report Date	Status Report
1/31/2012	<p>January 2012</p> <p>Human Resources have posted for 4 law enforcement officer positions and 4 public safety officer (Technician) positions.</p> <p>Search committee established.</p>

### Actual Results

Date	Actual Results
02/01/2012	When ESC added law enforcement officers, the department had to begin submitting Uniform Crime Reports (UCRs) to the Florida Department of Law Enforcement. 2010 was the first year of reports and compared to 2011, the college experienced an increase of Thefts in 2010 of 24 thefts to 48 thefts in 2011. The college also had an increase in simple assault from 2 to 4. Stolen Property increased from \$5438.00 in 2010 to \$12,798.00 in 2011. As students begin living on campus the department will encounter more incidents to respond to and investigate, including domestic disturbances, thefts, criminal mischief, drug & alcohol violations, etc.

#### Use of Results

Date	Use of Results
02/01/2012	With the increase of crime and other incidents the department will need trained law enforcement officers to respond and investigate and public safety technicians to respond and handle other less serious incidents and calls for service.

#### Gap Analysis

There are no Gap Analyses Results to Display

#### SWOT Analysis

There are no SWOT Analyses Results to Display

#### Units Impacted

There are no Units Impacted to Display

#### Associated Standards

There are no Associated Standards to Display

#### Associated Outcomes

Obj ID	Objective	Objective Purpose	Objective Status
1600	Reclassify Public Safety positions	Budget Outcome	Pending Approval

#### Objective Description

To reclassify Lee campus public safety positions to meet the demand of more public safety staff. Our current public safety staffing was established when the College was a commuter school and in the Fall 2012, we expect to increase staff of both law enforcement and non-sworn public safety officers to handle the expected increase in calls for service, crimes and other incidents when the Lee campus adds a residential building of 405 students on campus. The department expects to add 10 new positions to the existing staff.

Institutional Goals	Objective Types	Planning Priorities
No Institutional Goals to Display	No Objective Types to Display	No Planning Priorities to Display

Tasks				
Due Date	Status	Priority	Task	Budget Amount
07/02/2012	In Progress	High	Reclassify A Lee campus sergeant to Lieutenant reclassify a Lee campus Public Safety Technician to Lead Public Safety Technician.	\$0

#### Assessment Measures

Date	Assessment Measure
01/31/2012	<p>Currently the Public Safety department has a law enforcement officer working on the Lee campus Monday-Friday 7am-11 pm and Saturdays from 7 am- 3 pm. They are supplemented by a public safety technician the other hours so that staffing is that a public safety technician works with a law enforcement officer on the hours above and on the night-time hours the campus is staffed by two public safety technicians.</p> <p>Our Schedule in the Fall 2012 will add law enforcement officers so that we cover the campus community 24 hours a day 7 days a week. We also will increase by adding a non-sworn public safety officer (technician) so that we have a law enforcement officer and two public safety technicians 24/7. With this increase in staff, the current supervisor/sergeant on the Lee campus assumes greater responsibility in scheduling, payroll and supervision. He is supported by a public safety technician who assists in these matters and also in coordinating the special events that the department handles</p>

#### Intended Results

Date	Intended Results
01/31/2012	<p>With the Lee campus sergeant assuming a greater role we need to compensate him and also to provide a more defined chain of command in the department. He would become a Lieutenant and second in command in the department. His salary should increase with the increased duties. (\$5,000.00).</p> <p>With the public safety technician assuming a greater role we need to compensate her and also provide a more defined chain of command in the department. She would become lead officer and the lead public safety technician. Her salary should increase with increased duties (\$3,000.00)</p>
01/31/2012	<p>Presently there are two police officers at the Lee campus. To increase the hours available for law enforcement officer coverage, I would like to reclassify one of the full-time police officers to part-time and reclassify one of the part-time public safety technicians to part-time police officer. With this we could increase our law enforcement coverage by 8-16 hours a week.</p>

#### Status Reports

Report Date	Status Report
1/31/2012	pending

#### Actual Results

There are no Actual Results to Display

#### Use of Results

There are no Use of Results to Display

#### Gap Analysis

There are no Gap Analyses Results to Display

#### SWOT Analysis

There are no SWOT Analyses Results to Display

#### Units Impacted

There are no Units Impacted to Display

#### Associated Standards

There are no Associated Standards to Display

#### Associated Outcomes

Obj ID	Objective	Objective Purpose	Objective Status
1601	Reclassify a Public safety technician to Public Safety Technician Lead officer	Budget Outcome	Pending Approval

**Objective Description**

With planned increase of additional public safety officers on the Lee campus, I would like to reclassify Mary Lou Mahan to Public Safety Technician Lead Officer. She currently assists the sergeant in scheduling public safety technicians (officers), assumed responsibilities of the access/key control system and trains RAD classes.

**Institutional Goals****Objective Types****Planning Priorities**

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No Institutional Goals to Display

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No Objective Types to Display

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No Planning Priorities to Display

**Tasks**

There are no Tasks to Display

**Assessment Measures**

There are no Assessment Measures to Display

**Intended Results**

There are no Intended Results to Display

**Status Reports**

There are no Status Reports to Display

**Actual Results**

There are no Actual Results to Display

**Use of Results**

There are no Use of Results to Display

**Gap Analysis**

There are no Gap Analyses Results to Display

**SWOT Analysis**

There are no SWOT Analyses Results to Display

**Units Impacted**

There are no Units Impacted to Display

**Associated Standards**

There are no Associated Standards to Display

**Associated Outcomes**

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<b>Unit Code:</b>	<b>Planning Unit:</b>	<b>Unit Manager</b>
012412	Residence Life	Tepovich, Amy

### Unit Purpose

There is no Unit Purpose to Display

### Unit Goals

There are no Unit Goals to Display

Obj ID	Objective	Objective Purpose	Objective Status
1357	Residence Life Program Development Outcome	Operational Outcome	Implementing

### Objective Description

By the end of the 2011-2012 academic year, we will finalize the development of the residence life program; moreover, we will have a program in the initial phases of implementation. The success of this effort will be demonstrated through levels of occupancy and satisfaction that meet the expectations associated with financial and curricular models

### Institutional Goals

- A. Develop a comprehensive academic support system
- B. Build and implement strategies to identify new programs

### Objective Types

No Objective Types to Display

### Planning Priorities

\* Provide vibrant, relevant programs

### Tasks

Due Date	Status	Priority	Task	Budget Amount
10/03/2011	Complete	High	Hire Residence Life Assistant Director	\$0
04/02/2012	In Progress	High	Hire 8 Resident Assistants	\$0
09/01/2011	Complete	High	Convene Residence Life Steering Committee to develop policy and procedures	\$0
06/01/2012	In Progress	High	Develop Resident Assistant Training	\$0
08/01/2011	In Progress	High	Create and setup Housing Office	\$0
10/01/2011	In Progress	High	Develop application process and room selection process	\$0
03/01/2012	In Progress	High	Coordinate information sessions for potential residents and parents	\$0
10/01/2012	Complete	High	Purchase software to manage residence life operation	\$0

### Assessment Measures

Date	Assessment Measure
07/05/2011	Initial occupancy of residence hall
07/05/2011	Public safety, general counsel, and student services reviews of procedures manual
07/05/2011	Faculty and administration reviews of co-curricular, residence life, programming calendar
07/05/2011	Results of final training simulation ("Behind Closed Doors")

### Intended Results

Date	Intended Results
07/05/2011	Marketing goal: By August 2012, the marketing program will results in an occupancy level of 90% (this meets the financial model)
07/05/2011	Policy and Procedures Goal: By March 2012, the department will complete a policies and procedures manual that has been subjected to documented review by all involved constituencies. These reviews will indicate universal levels of acceptance
07/05/2011	Curriculum Creation Goal: By June 2012, the department will complete a co-curricular programming calendar that has been subjected to documented review by all involved constituencies. These reviews will indicate universal levels of acceptance
07/05/2011	Start-up staffing goal: By the end of July 2012, the department will have facilitated RA training to the extent that all RA's exceed minimal standards based on written RA training rubric

#### Status Reports

Report Date	Status Report
1/17/2012	Tasks updated above

#### Actual Results

Date	Actual Results
01/17/2012	Tasks completed: Hired professional staff Purchased software Developed application Identified Office Space Steering Committee Meets regularly

#### Use of Results

There are no Use of Results to Display

#### Gap Analysis

There are no Gap Analyses Results to Display

#### SWOT Analysis

There are no SWOT Analyses Results to Display

#### Units Impacted

There are no Units Impacted to Display

#### Associated Standards

There are no Associated Standards to Display

#### Associated Outcomes