From:	Tina Aguirre
To:	Linda Amidon
Subject:	FW: Time Sensitive - Program Review training
Date:	Monday, September 21, 2009 3:36:10 PM
Importance:	High

From: Tina Aguirre
Sent: Saturday, September 19, 2009 1:28 PM
To: Tina Aguirre
Subject: Time Sensitive - Program Review training

The Program Review form has been changed as a result of an evaluation conducted by subcommittees of the Educational Master Plan Committee (EMPC). The new formats will correct common issues experienced by department heads and by the EMPC subcommittees to enter, review, summarize, and prioritize the department needs. We believe the changes to both Part 1 (Annual Program Review) and Part 2 (Comprehensive Program Review) will simplify, clarify, and standardize the process.

The old Part 1 for budget, staff, equip, etc has been converted to a web-based database/template and ties the budget request for each individual line item to a specific EMPC Plan (i.e., Technology, Staffing, Facilities, etc.). The new Part 1 will also make quick work of building each of the 7 "Plans".

The new Part 2 for comprehensive review remains in a Word format, but it has been updated to clearly identify the periods for which program performance and objectives are under review: 1. Past (the past three academic years, 2. Present, and 3. Future (next three academic years). There will also be a standardized format for the initial basic data.

Training on the updated forms is scheduled for **Thursday September 24 at 3:00 p.m. and Friday September 25 at 11:45 a.m.** Both training sessions will take place in **Room 2131.** It is critical for you and your support staff to attend one of the training sessions. The updated forms along with written instructions will be provided prior to the training. Although the program review forms can easily be completed following the instructions, we highly encourage you and your staff to attend one of the training sessions.

As a reminder of the timeline, **step 1 and 2** (below) must be completed before we leave on 12/12/09 for vacation.

1. Each ORG must complete an annual program review and each assigned comprehensive review must be completed and
2. 6 Plans (technology, facilities, staffing, professional development, marketing, and SLO) will be created based on the information in step one and must be submitted

to their appropriate committee for review, then submitted to the Educational Master Plan Committee

Special thanks to those that were instrumental to the new forms: Omar, Valarie, Melani, Suzanne, Frances, and Dawn.

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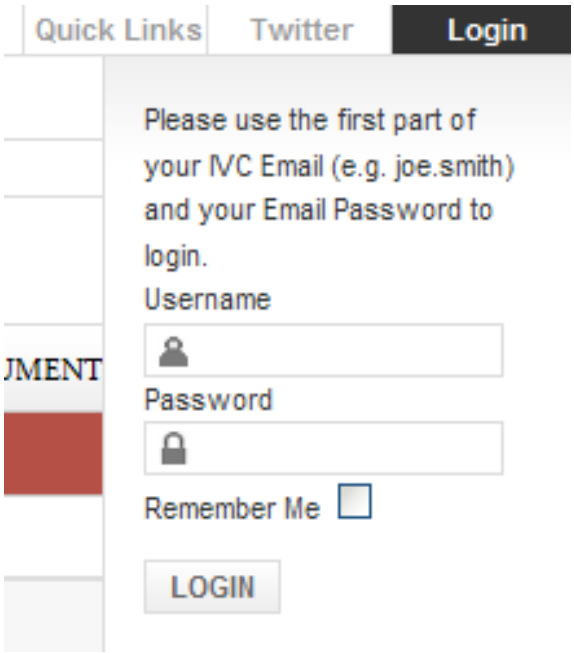
Program Review Application

1. Login to staff.imperial.edu

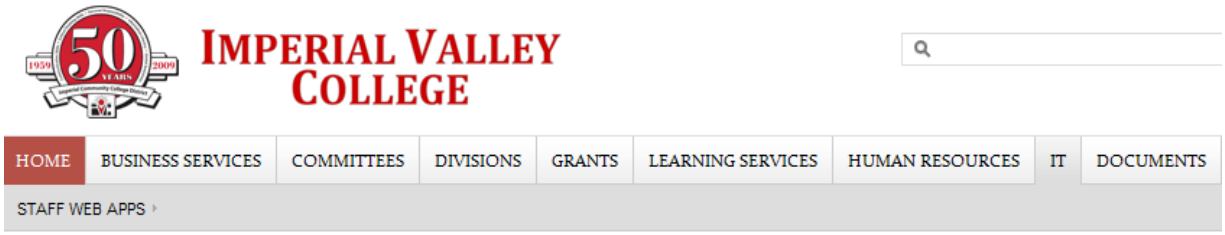
Once you get to http://staff.imperial.edu you will see in the top-right of the site a **Login** link. Hover your mouse over this link to bring up the login form and login with your **Domain Credentials** (this is the **first part** of your email address plus your email password, so if your email address is joe.smith@imperial.edu you would enter in **joe.smith** as the username):

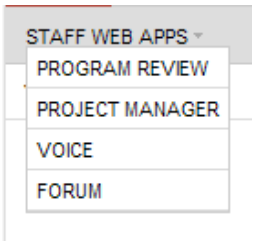


2. Go to the Program Review page within staff.imperial.edu

After you login to http://staff.imperial.edu you'll notice that the main menu has changed (at the moment I've only just begun this actual site so it is still really empty, or some links don't actually make sense as the site is still filled with quite a bit of demo content).

Under the **IT** menu item you should see a new link named **Staff Web Apps** (the naming of this might change in the future). If you hover over **Staff Web Apps** you'll see the **Program Review** link. Go ahead and click on it.





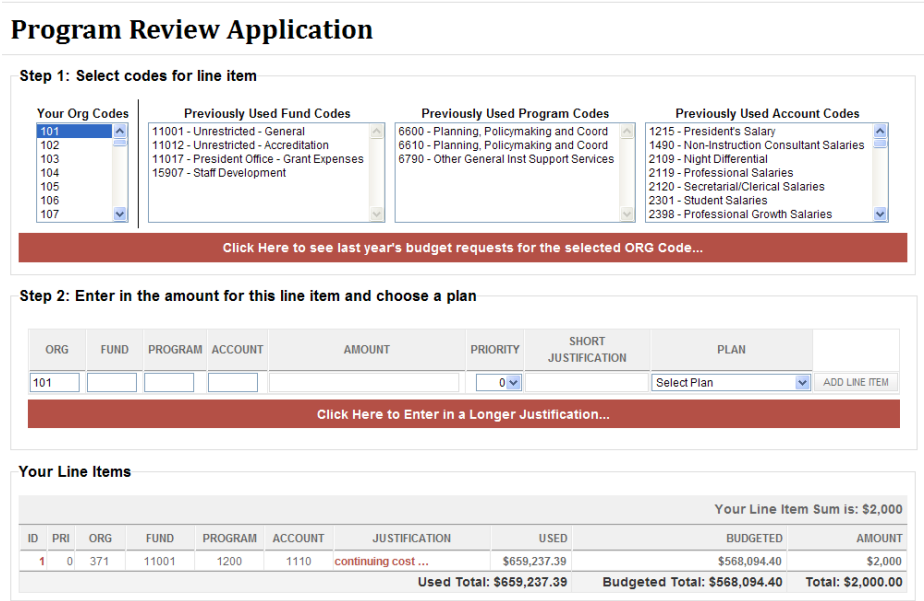
3. Make your Org Code Assignment Request via Email

Since Banner **does not assign** individual users to Org Codes, this assignment is handled locally within the application.

In the screenshot below you'll see the screen you would get on your first access of the Program Review application, before you have any Orgs assigned to your account. Since **I can't assign** you an Org Code **before you login** to the **Staff Website** the screen below should allow you to quickly **send me an email with the Org Code(s)** that you handle so that I can make the assignment in the administration area of the application.

4. Start adding line items for your assigned Org Codes

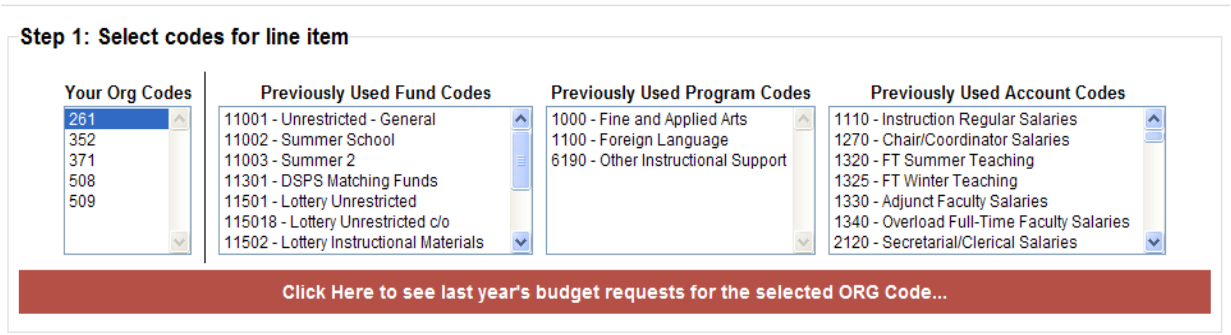
That's about it for setup so that you can get started adding Budget Requests for the upcoming Fiscal Year…below you'll see a screenshot of the entire interface (so far):



Adding Budget Requests

1. Select the Codes for your Line Item:

In the screenshot below you'll the interface for **Step 1** of the application. You'll automatically have your first Org Code selected in the **Your Org Codes** section, along with the **Previously Used Fund, Program, and Account Codes** for that Org Code (that is, the codes that have been used previously when creating budget requests in previous years).



You may also notice the big red bar that says **"Click Here to see last year's budget requests for the selected ORG Code"** if you click on this bar it will display a **sortable** table with all of last year's Budget Requests, ordered by Budget Phase, Fund, Program, Account.

My thought here is that having this table available will help in the addition process since you would quickly be able to see what was put into the budget last year (particularly, you would be able to see **which FOAPAL combinations you used last year**).

Due its size, you'll see a screenshot of this table on the next page.

Step 1: Select codes for line item

Your Org Codes	Previously Used Fund Codes	Previously Used Program Codes	Previously Used Account Codes
261	11001 - Unrestricted - General	1000 - Fine and Applied Arts	1110 - Instruction Regular Salaries
352	11002 - Summer School	1100 - Foreign Language	1270 - Chair/Coordinator Salaries
371	11003 - Summer 2	6190 - Other Instructional Support	1320 - FT Summer Teaching
508	11301 - DSPS Matching Funds		1325 - FT Winter Teaching
509	11501 - Lottery Unrestricted		1330 - Adjunct Faculty Salaries
	115018 - Lottery Unrestricted c/o		1340 - Overload Full-Time Faculty Salaries
	11502 - Lottery Instructional Materials		2120 - Secretarial/Clerical Salaries

Click Here to see last year's budget requests for the selected ORG Code...

Total Line Item Sum for GEN1: $63,094

Total Line Item Sum for GEN2: $2,213,660

Total Line Item Sum for GEN4: $2,709,040

Total Line Item Sum for GEN5: $2,303,518

Total Line Item Sum for GEN6: $2,303,518

Total Sum for all Budget Phases: $9,592,830

#	Phase	ORG	FUND	PROGRAM	ACCOUNT	Account Description	Amount	Date	Banner User
338	GEN1	261	11001	1000	4320	Instructional Supplies and Material	$8,000	2009-03-30	JESSICA_WADDELL
337	GEN1	261	11001	1000	4325	Music Supplies	$5,000	2009-03-30	JESSICA_WADDELL
336	GEN1	261	11001	1000	4340	Media Materials	$3,500	2009-03-30	JESSICA_WADDELL
335	GEN1	261	11001	1000	4401	Non-Instructional Supply / Material	$4,100	2009-03-30	JESSICA_WADDELL
334	GEN1	261	11001	1000	4455	Copying/Printing	$12,000	2009-03-30	JESSICA_WADDELL
333	GEN1	261	11001	1000	4460	Office Supplies	$5,000	2009-03-30	JESSICA_WADDELL
332	GEN1	261	11001	1000	4461	Copier Supplies	$1,500	2009-03-30	JESSICA_WADDELL
331	GEN1	261	11001	1000	5110	Consulting Services	$5,000	2009-03-30	JESSICA_WADDELL
330	GEN1	261	11001	1000	5190	Models	$1,000	2009-03-30	JESSICA_WADDELL
329	GEN1	261	11001	1000	5220	Travel - Staff Conferences	$4,800	2009-03-30	JESSICA_WADDELL
328	GEN1	261	11001	1000	5540	Telephone and Data Lines	$150	2009-03-30	JESSICA_WADDELL
327	GEN1	261	11001	1000	5621	Copier Maintenance Agreements	$2,400	2009-03-30	JESSICA_WADDELL
326	GEN1	261	11001	1000	5640	Equipment Repairs	$2,000	2009-03-30	JESSICA_WADDELL
325	GEN1	261	11001	1000	5860	Postage	$1,000	2009-03-30	JESSICA_WADDELL
324	GEN1	261	11001	1000	6490	Equipment - New Eqp under 5000	$7,644	2009-03-30	JESSICA_WADDELL
323	GEN2	261	11001	1000	1110	Instruction Regular Salaries	$610,700	2009-07-01	CARLOS_FLETES
322	GEN2	261	11001	1000	1270	Chair/Coordinator Salaries	$69,727	2009-07-01	CARLOS_FLETES
321	GEN2	261	11001	1000	1330	Adjunct Faculty Salaries	$234,360	2009-07-01	CARLOS_FLETES

2. Enter in the amount, a short justification, the priority and select a plan for your Line Item:

As you select Previously Used Fund, Program, and Account Codes from the list boxes in Step 1 you'll notice that **the text boxes** in Step 2 will **automatically fill** in for each of those as shown below:

Step 2: Enter in the amount for this line item and choose a plan

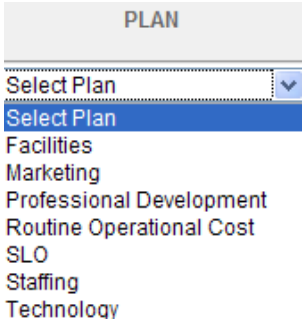
ORG	FUND	PROGRAM	ACCOUNT	AMOUNT	PRIORITY	SHORT JUSTIFICATION	PLAN	
261	11001	1000	1110		0		Select Plan	ADD LINE ITEM

Click Here to Enter in a Longer Justification...

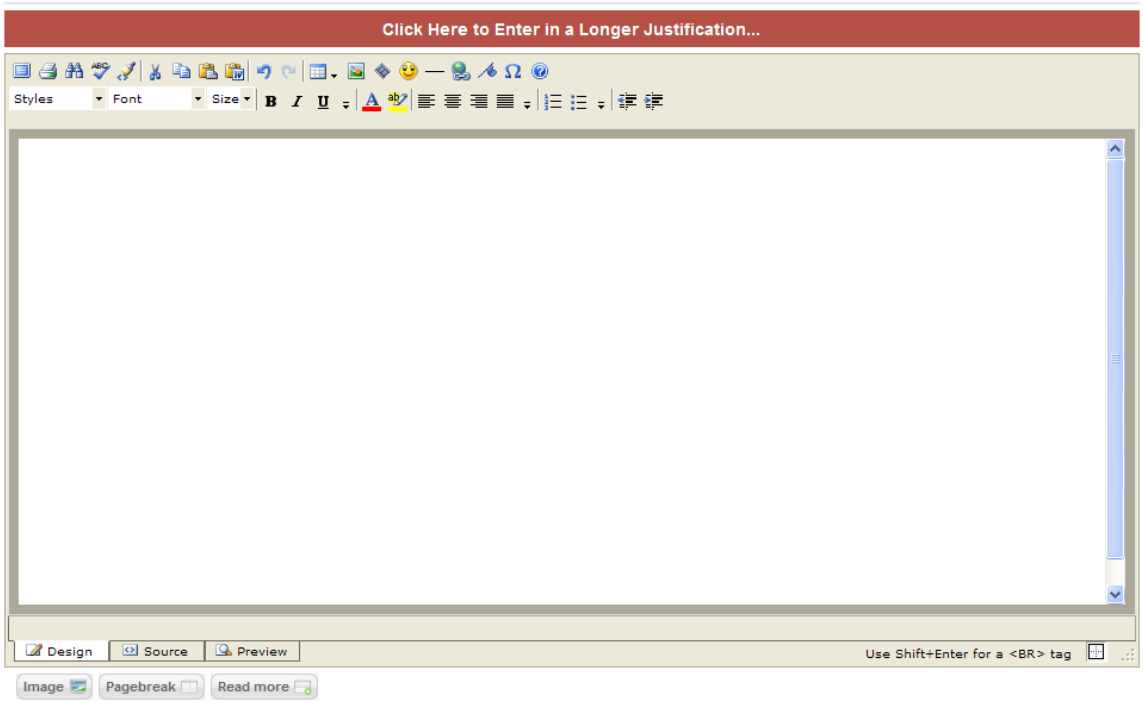
Unless you need to use a Fund, Program, or Account Code that you've never used before you won't need to do anything besides select from the lists of previously used codes, but should the need arise to use **a new code**, just enter it into the text box and everything should be fine (**in other words, you are not limited to using only those codes which you have used before**).

The main part of Step 2 is entering in **an amount, a short justification (255 characters or less) and selecting a priority and Plan** from the dropdown list and then **clicking** on the **Add Line Item** button.

Current Plan List:



The other part (which you probably don't want to worry about normally to make line item addition quicker) is the **long justification toggle**:



3. Modifying Line Items

I didn't want to pollute the database on the staff website with test entries so the screenshots below are from my testing server:

At the beginning the Your Line Items area will look like the following since it will not have anything just yet:

Your Line Items

But as you add entries you'll begin to see a table being created:

Your Line Items

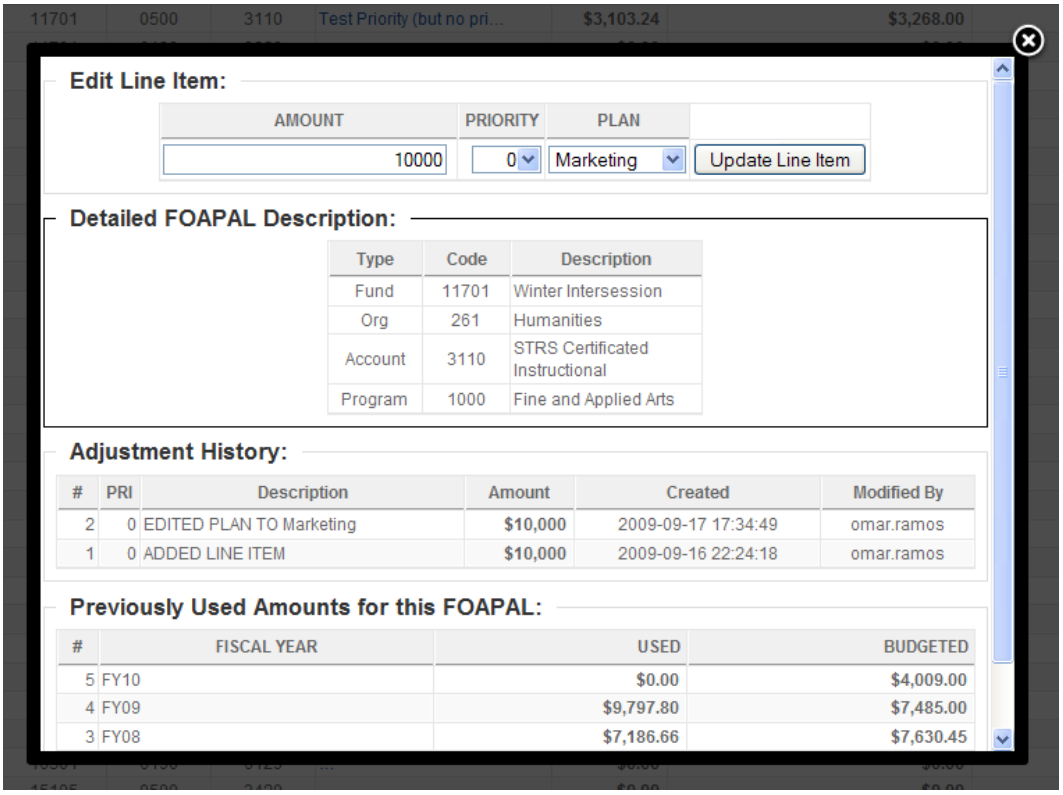
Your Line Item Sum is: $2,351,394

ID	ORG	FUND	PROGRAM	ACCOUNT	JUSTIFICATION	USED	BUDGETED	AMOUNT
63	261	11701	6190	3220	ya ya...	$0.00	$0.00	$100
62	261	11701	1000	3110	Testing the new justifica...	$9,797.80	$7,485.00	$10,000
61	261	11301	1000	3110	Testing new account code ...	$6,909.54	$8,576.00	$10,000
60	261	11002	1100	3110	Testing new account code ...	$1,721.86	$2,433.00	$10,000
59	261	11001	1000	1270	Testing the new previous ...	$67,731.88	$67,382.00	$15,000
58	261	11301	1000	1110	Updated Line Items Table ...	$63,539.75	$0.00	$100,000
57	261	11001	1100	1110	asdf...	$324,758.20	$0.00	$12,150
56	261	11001	1000	1110	Testing the previous year...	$596,237.62	$0.00	$540,000
55	261	11003	6190	3430	Updated Line Items Table ...	$0.00	$0.00	$54,000
54	261	16301	1000	3430	...	$0.00	$0.00	$130,000
53	261	11001	6190	4321	...	$0.00	$0.00	$19,000
52	261	15105	1000	3510	...	$0.00	$0.00	$150,000
51	261	11502	1100	3430	...	$0.00	$0.00	$1,250
50	261	16301	6190	6490	...	$0.00	$0.00	$10,994
49	261	16301	1000	6490	...	$0.00	$0.00	$11,500
48	261	16301	1000	5110	...	$0.00	$0.00	$1,500
47	261	115028	1100	5220	...	$0.00	$0.00	$115,400
46	352	11701	0500	4340	...	$0.00	$0.00	$1,500
45	261	11003	1100	1270	...	$0.00	$0.00	$10,000
44	261	115028	1000	3411	...	$0.00	$0.00	$585,000
43	261	15105	1100	5190	...	$0.00	$0.00	$15,000
42	261	11003	1000	1320	...	$0.00	$0.00	$15,000
41	261	11301	1100	1270	...	$0.00	$0.00	$15,000
40	261	11002	1000	5110	...	$0.00	$0.00	$515,500
39	261	11501	1100	3410	...	$0.00	$0.00	$1,500
38	261	16301	6190	6129	...	$0.00	$0.00	$1,000
1	352	15105	0500	3420	...	$0.00	$0.00	$1,000
						Used Total: $1,070,696.65	Budgeted Total: $85,876.00	Total: $2,351,394.00

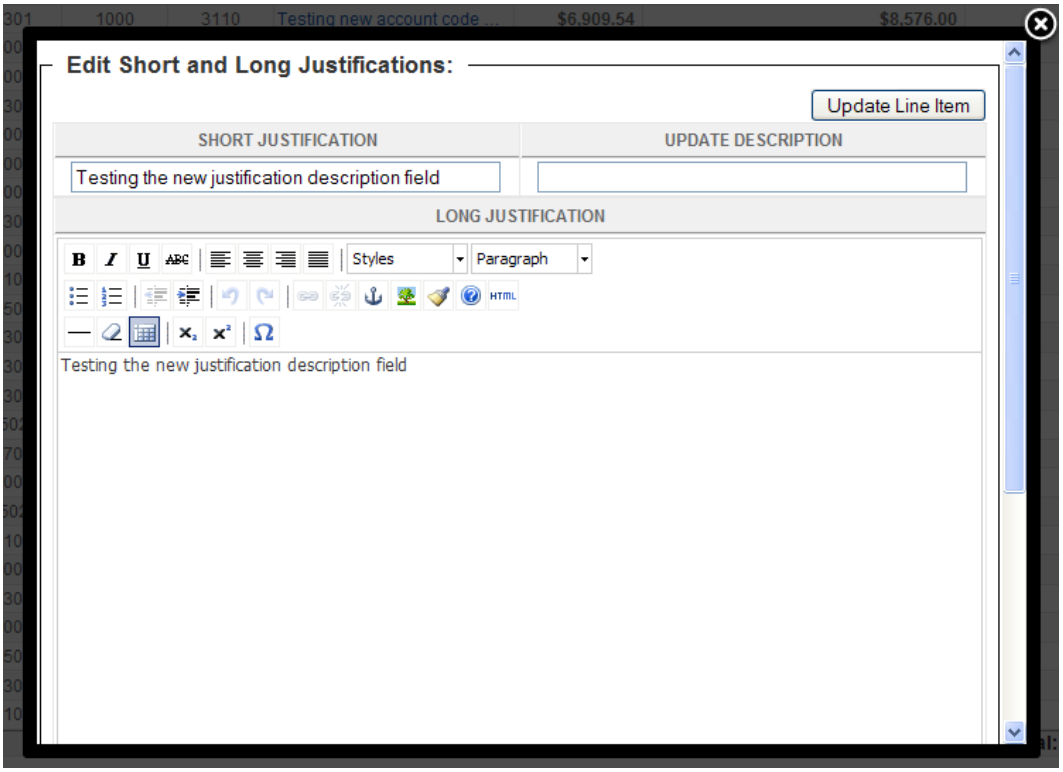
On the right-side of the table you'll see the following columns: Used, Budgeted, and Amount. The **Used** and **Budgeted** figures come from the last **completed** fiscal year's operating ledger, while the **Amount** column contains the figures you just entered into the program. Hopefully the extra Used and Budgeted columns will help for comparing the new figures with previous years.

Additionally, you may notice the links within the **ID** and **Justification** columns. When clicked on, each of these will popup a screen that will allow you to modify the Amounts+Plan or Short and Long Justifications, respectively. Not shown above as it was recently added is the **Priority** column, which is displayed next to the **ID** field on the left side of the table.

Here is an example of the Amount+Plan edit screen:



Here is an example of the Justifications Edit screen:



From:	Tina Aguirre
To:	Administrative Council Members; Division Secretaries; Division Chairs; Deans Of Instruction; Deans of Instruction Secretaries; Linda Amidon; Kevin White; Michael Heumann; Toni Pfister
Subject:	FW: Updated Program Review App Documentation
Date:	Tuesday, September 22, 2009 8:56:31 PM
Attachments:	Program Review Application Documentation.pdf Adding Budget Requests Documentation.pdf

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This email is meant for anyone who is responsible for a program review and their support staff.

Attached are two files for the training scheduled for **Thursday September 24 at 3:00 p.m. and Friday September 25 at 11:45 a.m.** Both training sessions will take place in **Room 2131.** The attached files refer to the new Staff Website: : http://staff.imperial.edu

We are asking for you and your support staff to learn how to enter data into the new form as we will all need help to meet the following deadlines.

10/26/09 Complete ALL program reviews for 2010-2011 (annual and comprehensive). This requires projecting the schedules for the entire year (2010-2011) and using the Enlighten enrollment tool.
11/17/09 ALL 2010-2011 program reviews must be submitted and reviewed by ALL 'Plan Committees' ; i.e. technology, staffing, facilities, etc. This is where the shared governance begins in this process and recommendations go to GEN O
12/12/09 ALL 2010-2011 program reviews must be submitted and reviewed by College Council and/or Academic Senate. This is the second step for shared governance. Additional recommendations will be considered for GEN O

Jan 2010 Division Chairs will finalize GEN 1 based on the all the prior steps and forward to …
Feb 2010 Planning and Budget Committee and Finance Dept will review GEN 1 and determine if further changes needed based on fiscal status
Mar/Apr 10 GEN 1 or 2 will be prepared for submittal to the Board
May/Jun 10 Budget approved and Divisions aware.
Jul 1, 2010 New budget begins
Sep 2010 Budget revisions to the Board based on state budget changes.