

DEVELOPING A DISTRICTWIDE STRATEGIC PLAN SAN MATEO COMMUNITY COLLEGE DISTRICT

Voorhees Group LLC

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OVERVIEW

The San Mateo County Community College District (SMCCCD) will create a bold and ambitious strategic plan to serve as unified decision-making framework through the year 2020. Voorhees Group LLC will work with District staff to facilitate a transparent planning process that is both participative and decisive. We will incorporate data already in use throughout the District within this new plan and work closely with the District's three colleges—Cañada College, College of San Mateo, and Skyline College—to integrate their planning accomplishments and aspirations within the new District strategic plan. The new plan also will encompass the Board of Trustees recent goal and vision-setting work as well as the latest thinking about new opportunities from District leadership. The result will guide the District's efforts to keep pace with the unprecedented transformations in higher education and a challenging future.

PLANNING PROCESSES

Our approach to facilitating SMCCCD 's new strategic plan will be open, transparent, and accountable. The hallmarks of our proposal include:

Open Participation and Transparency

Foremost, we believe that planning needs to be highly participative. It needs to be based on what San Mateo County Community College District already knows about itself and what it views as its opportunities and challenges. Voorhees Group LLC is committed to deep listening and working closely with all stakeholders to facilitate the best possible strategic planning process. Ultimately, planning documents come and go; ongoing planning processes are everything.

Strategic planning is difficult and sometimes intimidating work, especially as new information is unearthed and scary, squiggly facts are used. Strategic planning processes lose credibility unless all data are considered, especially data that may not be favorable to the organization. Voorhees Group LLC believes that all data produced in the strategic planning process should be shared widely and every opportunity should be made for comment, reflection, and, where necessary, gathering more information to ensure that the District's strategic planning represents a balanced and comprehensive look at the District's future.

Creation of a Communication Plan

We will work speedily with the SMCCCD liaison and the District's public relations function to create a communication plan for distributing accurate and timely information about the strategic planning process. We also urge the District to create a webpage dedicated as a

home site for the process. This page should be linked prominently on the District's home page and include all planning data, notes, drafts of the final plan, and a mechanism for comment.

If desired, we will help draft periodic press releases starting with initial releases announcing the planning calendar and thinking behind the planning process. We will also work with the planning liaison to provide periodic updates to the District community throughout the planning process.

District Strategic Planning Taskforce

We recommend the cultivation and appointment of an expanded taskforce to drive the planning process to consist of external and internal stakeholders. The Strategic Planning Taskforce would be larger than the current internal District Strategic Planning Committee and will help to guide and shape the new strategic plan. At the same time, it also is recommended that the existing District Strategic Planning Committee meet monthly throughout the planning process. While we leave the actual composition of the Strategic Planning Taskforce to the District based on their knowledge of individuals who can contribute best and efficiently, we suggest below these groups as places from which members could be appointed.

External

San Mateo County Board of Supervisors
 San Mateo County Economic Development Association
 San Mateo Area Chamber of Commerce
 City Mayors from Redwood City, San Bruno, and San Mateo
 Superintendents

- San Mateo Union High School District
- Cabrillo Unified School District
- Redwood City School District
- Menlo Park City School District
- Ravenswood City School District
- Hillsborough City School District

Community Based Organizations

Internal

SMCCCD Board of Trustees
 Executive and Faculty Leadership from Cañada College, College of San Mateo, and Skyline Colleges
 District SMCCCD Strategic Planning Committee
 District Academic Senate
 Leadership from Associated Student organizations at the three colleges

Use of Existing Data

The District and three colleges have invested heavily in collecting and analyzing data that can be used in this planning process. A goal of this process is not to reinvent data collection and reporting, but to integrate existing data where appropriate within the new strategic plan. We will consult with the District Strategic Planning Committee and others to identify opportunities where new data can drive strategic thinking as well as to identify gaps in existing data across the colleges and the District.

Strategic data are most often synonymous with *trend* data and include, in addition to basic enrollment patterns, student progression rates, degree and certificate attainment, and transfer rates. These data are most informative to a strategic planning process when they are disaggregated by race/ethnicity, age, and gender. A preliminary scan of the three colleges' websites indicates that a large body of data required for the new strategic plan is now available although in some instances these data require updating and refreshing (see the section "Review of Existing Data for Planning" below). We also recommend that instructional history data be collected, combined, and analyzed (see Appendix C).

Our preliminary scan of the three college's websites and preliminary discussions with District personnel indicates the availability in one place or another of student satisfaction surveys, the Community College Survey of Student Engagement (CCSSE), employer and industry surveys, employee perception surveys, and surveys of community members. We will work with institutional research personnel and District staff to harvest actionable data for this process. We also will augment District and college data with the California Community College Chancellor's Office Management Information System Data Mart.

Building Planning Scenarios

The planning process will explore three scenarios throughout the planning process. Planning participants will be asked to draw from their experiences and the data considered in strategy sessions and public forums to consider the District's overall future: (A) more of the same, but better; (B) worse; and (C) different but better (fundamental change). Scenario-based conversations can help participants connect their vision to the District's future and to understand the complexities of change. We have used scenario-building to identify building blocks and likely steps that organizations could take (or fail to take) to create their future.

Strategy Sessions and Public Forums

In our experience, the most effective way to engage internal and external stakeholders is to facilitate a series of data-driven strategy sessions throughout the planning process. These sessions are similar in nature to what most educators think of as focus groups. However, they have the advantage of bringing participants to speed with internal and external data while

launching discussions from a common starting point. We suggest that a series external and internal strategy sessions to be conducted with invited community leaders, business leaders, public school officials, and workforce development personnel. Strategy sessions would be held at each of the three colleges for both internal and external constituents.

We also recommend a series of public forums to highlight the emerging plan and to engage the public in the process. We further recommend that the District leadership host these sessions. Included would be brief presentations and comments from a panel as well as ample time for audience questions and comments.

High Touch

In addition to strategy sessions we also will make efforts to go to key internal and external audiences and individuals with insights for SMCCCD's future. This schedule will be developed in conjunction with the District leadership. We well understand that some members of the District community may believe they are too busy or uninterested in becoming involved in the planning process. Accordingly, we recommend that the District establish a planning web page to provide the widest opportunity for internal and external participation in the planning process. We also encourage the use of a discussion board to capture ongoing dialog about the process and its products.

Board Presentations and Retreat

Regular updates to the Board of Trustees at their regular meetings throughout this process are essential. The District liaison should provide them an overview of major events during these meetings as well as an overview of the actionable data being considered and the implications of planning scenarios as they are developed. It is anticipated that one or more members of the Board would be appointed to the District Strategic Planning Taskforce, thereby helping to spread communication about the developing plan among Board members.

When the planning process is nearing conclusion—at the point that recommended goals and strategies are ready for review—a Board retreat could be scheduled. We have preliminarily identified the week of March 26 as a likely possibility since Phase 4 of the work (Focusing on Synthesizing Findings and Mission and Value Statement Review) will be ongoing at that time, building on the insights and data used in the previous phases.

The agenda for this retreat would include interactive discussions among the Board, senior District staff including the three college presidents, and the consultant about planning scenarios; the role of the Board in guiding planning through policy and not in implementation; exploration of the issues unearthed during the planning process; an understanding of the actionable data developed for the process; viewing planning as a data-

driven journey; an overview of how the plan will be supported by budgeting; and the future range of decisions required by data-driven planning.

Integration with Existing Planning

We understand that the District is currently using its Strategic Plan 2008-2013 as its planning framework. It also is likely that other operational plans are available throughout the organization. Our approach is to honor past work, draw appropriately from planning accomplishments, use appropriate data as already gathered, and integrate that information to anchor SMCCCD's new education master plan.

Scope of Planning Goals

One way that planning becomes unsuccessful is when a long list of goals is produced, spreading the organization's efforts to thinly across multiple activities. The best plans set three or four fundamental and strategic goals that are easy to recall and enact.

Tracking Progress and Measuring Success

Plans are meaningless unless there is clear link between their implementation and the strategies and goals they contain. Metrics provide a measureable and tangible method for determining the success of strategies and goals. Processes and meetings are not metrics by themselves. For example, interactions among groups of employees, the process of attending meetings or sitting on a taskforce are not successful planning outcomes.

During the planning process, we will work in conjunction with the District Strategic We will work closely with the District's Planning Committee and others to develop a balanced scorecard with metrics to provide a framework for gauging the District's overall performance underneath its new goals. Voorhees Group LLC will also help the District to develop a "mid-stream" set of indicators for use in the second or third year of the five-year planning cycle to evaluate whether the strategies that support planning goals are on target.

Operational Planning

After agreement on San Mateo County Community College District's new strategic goals, we recommend that those goals be visibly animated by the District's budgeting process. This operational component is critical to ensure buy-in. Voorhees Group LLC will make a range of tactical recommendations to support its new strategic plan including laying out logical steps based on budgeting and planning processes now in place.

Connections to Accreditation

The process we recommend is in line with accreditation standards promulgated by the Accrediting Commission for Community and Junior Colleges (ACCJC), Western

Association of Schools. However, this process intends to not merely to satisfy external requirements but to extend the District's ability to fully define its future apart from accreditation. Taking planning to the next level not just compliance thinking but strategic thinking that makes use of actionable data and scenario development.

Ongoing Communication with Voorhees Group LLC

Constant communication with the consultant, the District liaison, and the Strategic Planning Taskforce will guide this work. Voorhees Group LLC manages ongoing work projects through telephone, video conferencing, interchange of scanned documents, and by frequent email. Travel by Rick Voorhees and others from Voorhees Group LLC to San Mateo County also is not a barrier to facilitating this process and is included in our cost proposal.

PLANNING CONTEXT

San Mateo County is widely recognized for innovation. Top research universities in the Bay Area as well as entrepreneurial spin offs create national and worldwide leadership in bioscience, computer software, green technology, hospitality, financial management, health care and transportation. Silicon Valley's high tech infrastructure and competitive labor markets result in an economy that is enviably robust when compared to most of California and the nation. Average salaries are currently well above the California average while housing costs are among the most expensive in the state.

While the economics of San Mateo County are moving forward, there are persistent income disparities as new high-income households moving to the county are outstripping middle- and low-income households. Lack of affordable housing coupled with in-migration of affluent families results in the flight of low- and middle-income families to other counties in the Bay Area and elsewhere. These shifts are weighty for SMCCCD as it considers the balance of programs and services to provide in the future and how they might match the needs and preferences of the range individuals, families, businesses, and companies residing in San Mateo County through 2020.

Higher education has also been disrupted. The models that worked in the past are not guaranteed to work in the future. For example, many colleges and systems have leveraged technology to speed the delivery of educational content, improve instructional delivery, and improve teaching and learning. Young learners come to colleges with increased expectations for the availability of technologically enabled instruction. The spread of Massively Open Online Courses is one signal in a long line that the instructional content that used to be available only behind the walls of higher education institutions is now freely

available. Other very recent trends affecting community colleges include the inverse relationship between enrollments and the economy. In locations where the economy has improved or done well—such as San Mateo County—enrollments are likely to decrease from their high watermarks experienced during the Recession. Other potent change factors include the inability of most states to restore higher education funding to levels reached before the Recession, and the need to strategically replace staff, faculty, and administrators who are, or soon will be, in the retirement zone.

The planning process proposed here will address these issues and other challenges while assisting the District to use data as well as visualize different kinds of futures using not just data, but intangibles including planning participants' dreams and hopes for the future. We will develop scenarios based on the District's current context to capture these intangibles and to make these scenarios real by identifying *actionable* data. Unlike day-to-day or routine data, actionable data brings challenges into sharper focus while guiding necessary conversations about the future. Participants in the planning process frequently identify new insights about data from their experiences and which data the District can act upon. Strategic planning is all about making deliberate choices based on actionable data and the insights of participants. It requires active participation by internal and external stakeholders as well as a sober appreciation of the realities and opportunities before SMCCCD.

Strategic planning also frequently means giving up something in order to pursue something new. Even with adequate funding, the District cannot realistically hope to meet all known educational needs within the County, begging the question of which needs are paramount and what resources and innovations can be brought to bear to meet those needs. We will work with stakeholders to identify those choices and to seek their input about future directions for the District.

Exceptional community colleges do more than operate isolated programs and planning processes. Intentional efforts are required to build an organizational culture that continuously drives toward excellence. Strategic planning is a journey and cannot be a one-time event that addresses current challenges only to be quickly forgotten until other challenges and threats arise. Drawing from our experiences in facilitating community college strategic planning throughout California and elsewhere, Voorhees Group LLC will assist the District not just by providing information and approaches for successful strategic planning but will also coach the process from beginning to its conclusion. Ultimately, most strategic plans fail because the processes used to generate the plan die the moment a plan is produced. Voorhees Group LLC will work collaboratively with the District to help implement and embed the new strategic plan.

QUESTIONS TO GUIDE SMCCCD'S PLANNING PROCESS

Strategy is fundamentally different from the routine. Most community colleges spend far too much time exploring what they *already know* when they would profit from exploring the *unknown*. In our experience, the critical questions that a successful strategic planning process can answer are:

1. What vision for the future do internal and external District stakeholders share? What are common assumptions about the District's future? What do stakeholders believe should change?
2. How does the District define innovation? Which programs and services are currently and widely considered as innovative? What are the District's aspirations for innovation?
3. Transformative practices are rapidly emerging in higher education. Among its present practices, which does the District consider to be innovative? Which innovative practices are aspirational?
4. What roles do the District's three colleges play in supporting educational opportunities throughout the county? Are their roles differentiated? Should they be?
5. Which populations and subpopulations does San Mateo County Community College District now serve? More strategically, which subpopulations or market segments are *not* being served? What would it take to recruit and retain new learner segments?
6. What is the District's current penetration rate by learner segments? What steps could be undertaken to realistically increase SMCCCD's market share of these segments?
 - a. Which demographic cohorts are increasing within San Mateo County Community College District? How will the mix of demographic cohorts look in the short-term (five years) and long-term (ten years and beyond)?
 - b. What is the current racial/ethnic and socio-economic mix among students? How does this compare to the service area? Where are there gaps?
 - c. How many and what types of students commute to SMCCCD colleges?
 - d. How many immediate and recent high school graduates are currently served by SMCCCD? What are the projections? Are there trends in academic preparation among recent high school graduates that would affect SMCCCD's academic planning? What are the lessons to be drawn from SMCCCD's work with area high schools?
 - e. What is SMCCCD's share of working adult learners? Of older students?
 - f. How do mobility patterns within San Mateo County and the Bay area impact the District?

7. Beyond simply enrolling students (and assessing penetration rates) what are the student success rates for *all* entering students (to supplement the outcomes based on a narrow slice of students captured by the State Chancellor's Office's Student Success Scorecard)?
8. What is the net price (cost of attendance minus financial aid) for low-income students to attend college?
9. What is the breadth and depth SMCCCD's current workforce partnerships? Is there capacity at the District for more? Is there capacity in the business community for more?
10. What is the District's use of instructional technology for online courses, hybrid courses, and "traditional" courses
11. What are the likely interactions between future students and programs and services? What strategic enrollment management strategies will the District's colleges need to develop to meet customer needs for education now and in the future
12. In tandem with question #11, are San Mateo County Community College District's *existing* projections for student enrollment, instructional space, existing programs, and support services in existing locations and in new locations realistic?
13. How will SMCCCD implement the new credit funding formula in Student Success and Support Program Core Services to meet the Student Success Act, AB 1465? What are SMCCCD's plans for increasing the number of degrees, certificates and transfers? What core strategies will SMCCCD develop and use to move basic skills students through to completion? What impact will this have on the District's future?
14. What is the District's commitment to an inquiry-based culture and continuous quality improvement?
15. How can San Mateo County Community College District most effectively integrate its new strategic plan with its budget setting processes? Strategic plans often fall woefully short of their promise simply because the scaffolding to for operational planning is only an afterthought.

PLANNING PRODUCTS

Voorhees Group LLC will deliver a written planning document that includes these elements.

Environmental Scan

SMCCCD's new environmental scan is a work in progress and already contains appropriately broad categories to support this strategic planning effort. Some of the data now requires updating; early in this process Voorhees Group LLC will work closely work with

District staff and research offices as updating occurs. Our experience in creating environmental scans is that they are most helpful when they form a narrative and less helpful when they are a collection of numbers that need explanation. Non-educators, in particular, can find displays of data to be daunting and are more likely to need a storyline.

We will also use these offices as sounding boards to ensure that key data find a match in the planning process. Where appropriate, and based on feedback gathered during the strategy sessions described above, we will recommend modifications to sections of the existing scan or individual data elements when they appear actionable for the District. SMCCCD's environmental scan and planning assumptions will be developed from these sources:

Primary data

- Data requests made of the Districts and District Office for this project (see Appendix B for specific data requests to be made of SMCCCD)
- San Mateo County Community College District accreditation reports and correspondence
- San Mateo County Community College District existing planning reports
- Other internal studies and reports

Secondary data

- California Community College Chancellor's Office
- California Department of Finance (for official population projections)
- Local Chambers of Commerce
- City and San Mateo County planning offices
- Research reports produced by national, state, and local agencies
- Planning documents from other community colleges in the area
- Data and Reports from the California Department of Education
- US Department of Labor, Bureau of Labor Statistics
- US Immigration Service (Metropolitan Statistical Area in-migration data)
- Internal Revenue Service (county-by-county migration data)
- National Center for Education Statistics (NCES), Integrated Postsecondary Education Data System (IPEDS) Peer Analysis System

Planning Assumptions

To engage effectively in planning, District stakeholders should proceed from a set of assumptions about the District's current functioning and future aspirations that identify both opportunities for progress and barriers. This step saves considerable time as the plan is developed. A plan built on faulty assumptions about future resources, student characteristics, or the District's own capacities to meet the future is destined for failure.

Current Student Demographics and Success Rates

We will identify trends in student enrollments at the three colleges and compare past trends to likely future scenarios. Of particular interest is not just the profile of current students but also the profile of prospective students who don't take advantage of the District. We will use Census data and official population projections by age, gender, and race/ethnicity to estimate this gap. Understanding current students, their demographic trends, satisfaction with their experience, and success rates also is critical to creating a meaningful education plan. From what locations do current students enter SMCCCD colleges? Are there notable shifts over time?

What is SMCCCD's *overall* student success rate as measured by the proportion that complete developmental education, gatekeeper courses, and move on to complete certificates, degrees, or successfully transfer. What is SMCCCD's overall retention rate? How does it vary from college to college and how are differences explained? We will use five data points for cohorts of all entering students who: (1) successfully complete the courses they take; (2) advance from remedial to credit-bearing courses; (3) enroll in and successfully complete gatekeeper courses; (4) enroll from one semester to the next; and (5) earn degrees and/or certificates. Understanding those places in the District's education pipeline where students are making progress (or not) can help form fundamental strategies for the strategic plan.

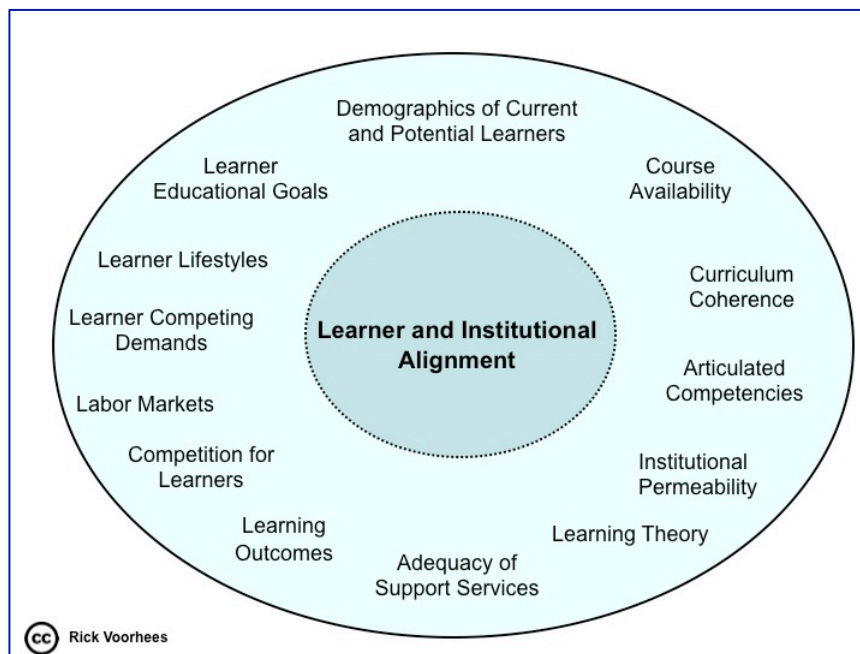
Learner and Institutional Alignment.

Central to strategic planning is the equilibrium between SMCCCD and its current and prospective learners. Voorhees Group LLC has used the diagram in Figure 1 to serve as a framework that college's can use to identify how current programming and services match learner needs and expectations. It is drawn from Voorhees Group LLC's fieldwork with community colleges across the United States. In Figure 1, the learner is placed symbolically in the middle of all institutional interactions so as to systematically examine a range of factors that impact equilibrium or alignment. The purpose is to allow colleges to identify, develop and/or refine, implement, and evaluate current and proposed programs, services, and offerings. The components of Figure 1 are explained further in Appendix B.

Strengths, Weaknesses, Opportunities, and Threats (SWOT)

We propose a general online SWOT survey that would be made publicly available to all citizens of San Mateo County as well as internally to all SMCCCD employers and students. SWOT is a tool that combines perceptions of individuals inside organizations to identify issues during the early stages of a planning process. Strengths are the strong parts of the organization that can be directly controlled. Weaknesses, on the other hand, are those elements of the organization that are not positive but can also be controlled. Weaknesses

represent areas that Morton College can improve. Opportunities and threats operate



outside the organization and while they are usually beyond control, San Mateo County Community College District may be able to influence their impact. The most productive use of energy, however, is on those elements that an organization can control, i.e., strengths and weaknesses.

Figure 1

Academic and

Student Services Leadership Survey

Voorhees Group LLC also proposes a brief, open-ended survey of the academic and student services leadership (the chief academic officer and those reporting to this individual as well as the chief student affairs officer and those reporting to this individual) at the three colleges as well as appropriate District personnel. This exercise will be used to identify specific current and future programs and services that respondents believe to be innovative. The survey will also probe barriers and opportunities to creating future programs.

Enrollment Projections and Enrollment Management Scenarios

Future community college enrollment depends on a complex interplay of factors. Some of the variables that influence future enrollment are outside a college's ability to influence (such as the current economic recession). We also believe that much of a college's ability to grow can be controlled and includes increasing the success and retention of students presently enrolled. Toward this end, we will create not simply enrollment projections for San Mateo County Community College District, but enrollment *scenarios* based on current participation rates for market segments that model the effect of deliberate decisions the District may make to maximize its enrollment in key market segments.

The market share approach considers the District's current penetration rates and compares those rates to official population projections. This methodology allows us to develop projections for San Mateo County Community College District that will forecast district-wide enrollment by race/ethnicity, age, and gender for through the year 2030. A key part of these projections will model the effect college actions on future enrollments. For example, enrollment forecasting scenarios we have used with other community colleges include: a) status-quo (the result of doing nothing new, merely continuing existing marketing and enrollment management strategies), b) the effect of increasing shares of sub-populations with the lowest overall college participation rate, c) the effect of increasing shares of 18-19 and 20-24 age cohorts, and d) the effect of increasing penetration among adult and workforce markets.

Labor Market Projections and Outcomes

We will utilize Labor Market Information (LMI) data made available through the state's Employment Development Department to forecast demand by education level for the West Bay Counties. These data will be arrayed for the fastest growing occupations and for those occupations with the largest numerical growth through the year 2020. These data will be used to gain an overall understanding of the District's alignment with workforce needs. These data are somewhat limited, however, by the categorizations of employment types as well as timeliness. Participation by employers in the strategic planning process can sometimes refine those data and uncover trends that large-scale databases may not reveal. Labor market research also lags the economy, making employment projections for specific occupations tenuous.

Efforts to gather employment data for individual graduates and former students now are in the early stages in California. Matching California's unemployment insurance match UI records with those of college graduates to generate aggregate employment and wage data is now underway and probably won't be available for this plan. However, the US Bureau of Labor Statistics (BLS) regularly collects data on employment and earnings of US workers. Two websites provide colleges with readily accessible information on average wages by

occupation and by geographic area. The BLS data would only be proximal, however, but can help engage stakeholders in discussions about supply and demand. Developing these data are important to planning and can help the District determine where to plan to meet labor market needs and where the market is saturated for particular graduates.

Competitor Analysis

A *competitor analysis* is a keystone within the education plans Voorhees Group LLC has facilitated for other community colleges. This component of strategic planning involves comparing the postsecondary education programs available from higher education institutions within a 30-mile radius of the campus. Our experience is that a 30-mile radius is the maximum a commuting student in an urban environment for a unique program, unless they were interested in regional programs or signature programs not available elsewhere. Such analysis helps colleges to see where they have a competitive advantage. Namely, a competitor analysis identifies which of a college's existing programs are found elsewhere within this radius and which programs are "niche" programs (e.g. distance learning classes and programs).

Voorhees Group LLC has also built a comprehensive database of community college programs offered throughout the United States that can also point to potential niche programs that San Mateo County Community College District might consider based on corresponding labor market demand and capabilities of the District to create. We also will work with the District to explore the emerging areas of online community college classes and programs available nationwide from competitor institutions and how this information may influence the District's decision-making.

Program Vitality

The recession has meant unparalleled enrollments for community colleges but with a cost. Most community colleges are stressed on both the personnel and facilities front as resources have not kept pace. This is very evident in California. We will address this concern in several ways. First, the data template (Appendix C) that we suggest will provide a five year' tend of the array of classes, locations, and times/days of offering. Second, we will work the colleges to examine class scheduling options and instructional formats. Community colleges nationally are leading in efforts to provide students mixed face-to-face instruction with online instruction in hybrid formats to provide instructional and space alternatives.

Our analysis of future instructional program growth will be based on trend data drawn from the colleges , results of employment projections, takeaways from external and internal strategy sessions, and the District's own aspirations for growth. These information sources also will be informed by the competitor analysis we will perform for the District. Understanding current program vitality should influence future choices.

Future Capacity and Faculty Succession

We will also model the future choices that SMCCCD can make in its instructional staffing by calculating faculty time at the institution, chronological age, and likely retirement date. The resulting data points will provide a range of future dates that the District should consider in replacing key positions. At a more granular level, the District might ask which key disciplines, such as STEM-related areas, will require special attention in light of the national faculty shortage.

Instructional Technology and Instructional Innovation

Our service in facilitating SMCCCD's education plan also includes an analysis of current levels of available instructional technology, usage by faculty and students within courses and outside of courses, and the trends that likely will influence teaching and learning for the foreseeable future. We will also draw on our experience at other community colleges to suggest opportunities for the further use of technology. The course file data request (Appendix C) will be used to answer whether, for example, on-line and/or hybrid (mixed mode) offerings are increasing by location and subject area as well as in total. Our work with other community colleges indicates that nearly a third of students prefer a fully on-line or blended e-learning delivery format.

We also will evaluate the current status of SMCCCD's instructional technology infrastructure. It is almost certain that young students bring expectations for access to technology at a time when community colleges everywhere are investing heavily in infrastructure and technologically-aided course development. We also will look for appropriate avenues for collaboration in online consortia including the California Virtual Campus.

Financial Comparisons

No strategic plan can be complete without considering the organization's financial position. Key data points here include trends in state and local revenue, expenditure patterns, and faculty salaries. It is important also to understand the balance between student resources and cost of attendance patterns over time. Comparing the three college's financial position with other community colleges can also illuminate the strategic planning process. Voorhees Group LLC makes use of the U.S. Department of Education's Integrated Postsecondary Data System (IPEDS) to compare revenues and expenditures by functional area using categories developed by the National Association of College and University Business Officers.

Mission, Vision, and Values Refresh

Engaging in comprehensive strategic planning presents a window to refresh its statements of mission, vision, and values. These statements can flow from both the data-

enabled nature of the planning process as well as the input of stakeholders as gathered through strategy sessions, surveys, and interviews. A draft of these statements logically fit in the same time frame that recommended goals, strategies, and metrics are prepared. Both can be finalized simultaneously. Voorhees Group LLC also has designed online surveys to provide a wide glimpse of college stakeholders' preferences for these statements. An example of this survey can be found here: <http://www.surveymonkey.com/s/CG7K6YK>

Recommendations for Moving from Strategic to Operational Planning

San Mateo County Community College District may already have linked its current planning processes to annual budget setting activities. We will explore this with the District and, if appropriate, make recommendations about how to implement the District's new education plan with operational processes.

Our experience is that many strategic plans are only glossy statements of aspirations. To make a plan meaningful is to dig underneath "feel-good" goals to operationalize the District's support for its new strategic plan. Gaining a sense of what the units and departments of the District's colleges can do to support strategic planning goals in the form of strategies is fundamental to ensuring that the new plan is implemented. Similarly, metrics and metric development (as highlighted above) are a vehicle for determining whether strategies are on target or need to be adjusted in subsequent planning cycles.

REVIEW OF EXISTING DATA FOR PLANNING

A review of the District's preliminary environmental scan indicates a need to develop key, new data. In some places current environmental scan data are older than five years. We suggest deleting these data points unless they are important to depicting a recent trend. We assume that staff at SMCCCD will update the routine data found in the preliminary environmental scan while the task of gathering and analyzing the data found immediately below will be a joint responsibility between Voorhees Group LLC and the District. In several instances below, Voorhees Group LLC will be gathering primary data to perform the analyses mentioned above; where applicable, these are noted.

Other Data Needs for Strategic Planning

1. Local data on secondary school enrollment and graduation trends by school
 - a. Trends in the share of San Mateo high school graduates enrolling at the three colleges

2. Population projections by age, race/ethnicity, and gender for San Mateo County and Bay Area counties. [Note: these data will be gathered by Voorhees Group LLC and used as part of the enrollment projections and scenario data as explained above]
3. Penetration rates at each college by zip code including San Mateo County and surrounding Bay Area Counties
 - a. An analysis of which classes students from outside San Mateo County are enrolled to help identify unique programs drawing students
4. Student success data illustrating the progression of *all* entering students who: (1) successfully complete the courses they take; (2) advance from remedial to credit-bearing courses; (3) enroll in and successfully complete gatekeeper courses; (4) enroll from one semester to the next; and (5) earn degrees and/or certificates.
 - a. Disaggregate these data by age, race/ethnicity, gender, and secondary school
5. Class sections by days of the week and time of day for face-to-face classes
 - a. Disaggregate by subject area. [Note: part of the course file request (see Appendix C). Analysis performed by Voorhees Group LLC.]
6. Class sections by subject area and mode of delivery: hybrid, fully online, and face-to-face. [Note: part of the course file request (see Appendix C). Analysis performed by Voorhees Group LLC.]
7. Net price (cost of attendance minus financial aid) for low-income students to attend college.
8. Degrees and certificates awarded disaggregated by race/ethnicity, gender, and age.
9. Transfer volume and trends. These data could come from the National Student Clearinghouse, assuming that the three colleges have a subscription.
10. Faculty (part-time and full-time) by age range, discipline, and years of service in the District.
11. Trends in private fund development.
12. Updates to the SMCCCD Facilities Master Plan.
13. Summaries of 2013 Community College Survey of Student Engagement (CCSSE) results for Cañada College and 2012 CCSSE results for Skyline College. We understand that College of San Mateo has not participated in CCSSE.

PROJECT STRUCTURE, PHASES, AND TIMELINES

Planning Phases, Timelines, Tasks, and Responsibilities

Table 1 represents our description of the project structure and detailed timelines as well as identification of responsible parties for each activity. This strategic plan would be built in five phases. Completion of each phase leads logically to the next phase. Each phase

makes heavy use of strategy sessions and public forums to ensure that informed opinions and insights are harvested throughout the process. A first round of strategy sessions could be used test the District’s updated environmental scan and to identify planning assumptions. A second round would build upon the external actionable information presented in the first round and extend that knowledge by focusing on internal data developed for the education plan. A third round of strategy sessions would be used to test preliminary planning goals, strategies, and metrics and to gather further input. A last set of strategy sessions and public forums would be used as an avenue to gather final input into the plan and to create awareness of operational strategies the District has endorsed to operationalize it

Dates are flexible within this proposed schedule and are listed here to provide an overview of how, in our experience, planning activities could be integrated and sequenced to meet the District’s needs. This schedule requires matching the targets for internal data as proposed and the selection of a planning liaison. It is critical that a single point of contact be named with the authority to moving the process and associated schedules forward. This individual will oversee scheduling, coordinate internal and external strategy sessions, ensure that internal data requests are met according to the timeline below, and assume overall responsibility for the activities identified as “SMCCCD” in Table 1. Rick Voorhees will assume overall responsibility for the activities labeled “VG.”

Table 1			
Planning Phases, Timelines, Tasks, and Responsibilities			
<i>Phase One: Identification of Expectations, Contract Finalization, Information Gathering, Communication Plan, Internal and External Strategy Group Scheduling, and Preliminary Analyses (June 2, 2014 through August 31, 2014).</i>			
<i>Target Date/Week</i>	<i>Tasks</i>	<i>Primary Responsibility</i>	<i>Supporting Responsibility</i>
TBD (late June/Early July)	Voorhees confers with chancellor, vice chancellors, and cabinet, including the three college presidents, about planning process, expectations, outcomes, and dates.	VG, SMCCCD	n/a
Week of July 14, 2014	Contract negotiation completed. Signed contract issued. Overall strategic planning liaison named by District.	SMCCCD, VG	n/a
TBD (Mid to Late July)	Voorhees confers with each college president and subsequently with respective college cabinets to explore college planning accomplishments and gather ideas about how best to integrate their work within the new District Strategic Plan.	VG, SMCCCD	n/a
Week of July 21, 2014	Planning process and dates finalized.	SMCCCD	VG
Week of July 21, 2014	Communication plan developed for transparency.	SMCCCD	VG

Table 1 Planning Phases, Timelines, Tasks, and Responsibilities			
	SMCCCD Chancellor's Office announces strategic planning process via press releases in print and electronic media formats.		
Week of July 21, 2014	Assemble contact information for external stakeholders including governmental planning groups, civic leaders, Community Based Organizations, and neighborhood associations.	SMCCCD	VG
Week of July 28, 2014	District Strategic Plan Taskforce appointed and publicized.	SMCCCD	VG
August 4, 2014	SMCCCD transmits internal SMCCCD data to VG. VG begins review and analysis of internal data. Obtain written reports and commence analysis of available "actionable" information.	SMCCCD, VG	n/a
August 4, 2014	SMCCCD preliminary environmental scan updated with most recent data.	SMCCCD	VG
Week of August 11, 2014	Voorhees on site at SMCCCD and its colleges during their opening days. Overview of strategic planning presentations made at college opening days. Internal Strategic Planning Committee meets.	VG, SMCCD	
Week of August 11, 2014	SMCCCD goes live with its strategic planning webpage including a planning schedule and to include all data developed for the strategic planning process.	SMCCCD	VG
Week of August 25, 2014	SMCCCD's updated environmental scan and recommended planning assumptions from VG posted to SMCCCD's strategic planning webpage.	VG	SMCCCD
<i>Phase Two: First Strategy Sessions Focusing on External Data and Information, Internal and External Interviews, Convening of the Strategic Planning Taskforce, Presentation and Finalization of Draft Scan and Assumptions, Preparation of Internal Data for Review in Phase 3 (September 1, 2014 to October 31, 2014).</i>			
<i>Target Date/Week</i>	<i>Tasks</i>	<i>Primary Responsibility</i>	<i>Supporting Responsibility</i>
Week of September 1, 2014	Online SWOT survey for internal and external stakeholders opens. Email to all college employees, students, and external groups.	VG, SMCCCD	n/a
September 8, 2014	Online survey for academic and student services leadership (colleges and district personnel) survey opens. Identifies opportunities, innovations, and barriers.	SMCCCD, VG	n/a
Week of September 15 2014	San Mateo County Community College District student demographic data and success rates available for internal review. Analysis of penetration rates by secondary schools, nontraditional students, workforce training, and race/ethnic county demographics.	VG	SMCCCD
Week of September 22, 2014	Voorhees, Gonzales, and Bedard-Voorhees visit	SMCCCD, VG	n/a

July 7, 2014 for Distribution

Table 1			
Planning Phases, Timelines, Tasks, and Responsibilities			
	SMCCCD. First College-wide Forum held, followed by strategy sessions and interviews throughout the week. First round of external and internal strategy sessions commence. Test environmental scan, planning assumptions, and preliminary SWOT analysis. Convene Strategic Planning Taskforce. Continue with interviews of San Mateo County Community College District administrators, Board members, faculty leadership, business/community leaders and members of the Core Planning Team. Schedule determined by San Mateo County Community College District and posted to SMCCCD's strategic planning webpage.		
Week of October 6, 2014	Finalized environmental scan and planning assumptions posted to SMCCCD strategic planning webpage.	VG	SMCCCD
October 10, 2015	SWOT Survey Closes	VG	
Week of October 13, 2014	Labor market analyses and projected needs for San Mateo County Community College District programs available for internal review.	VG	SMCCCD
Week of October 20 2014	Labor market analyses and projected program needs posted to SMCCCD strategic planning webpage.	SMCCCD, VG	n/a
Week of October 20, 2014	Results of academic and student services leadership and survey for internal review.	VG	SMCCCD
Week of October 27, 2014	Academic and student services leadership survey posted to SMCCCD strategic planning webpage.	SMCCCD, VG	
Week of October 27, 2014	Strategic Planning Taskforce convenes second meeting. Reviews progress and all data produced to date.	SMCCD	
<i>Phase Three: Second Strategy Sessions Focusing on Internal Data and Information, Internal and External Interviews, Convening the Strategic Planning Taskforce, Developing and Testing Internal Data (November 1 through February 15, 2015).</i>			
<i>Target Date/Week</i>	<i>Tasks</i>	<i>Primary Responsibility</i>	<i>Supporting Responsibility</i>
Week of November 3, 2014	Enrollment projections and scenarios under different assumptions by through 2030 available for internal review. Competitor analysis available.	VG	SMCCCD
Week of November 17, 2015	Strategic Planning Taskforce convenes third meeting. Reviews progress and all data produced to date	SMCCD	
Week of December 8, 2014	Voorhees on site at SMCCCD. Second college-wide forum. Second round of internal and external strategy sessions to review and validate internal data trends. Internal and external interviews continue. Interview San Mateo County Community College District administrators, Board members, faculty leadership, business/community leaders.	VG, SMCCCD	

Table 1 Planning Phases, Timelines, Tasks, and Responsibilities			
	Strategic Planning Taskforce convenes fourth meeting. Schedule determined by San Mateo County Community College District and posted to SMCCCD strategic planning webpage.		
Week of December 8, 2014	Online mission, vision, and values survey opens.	SMCCCD, VG	n/a
Week of December 8, 2014	Internal Strategic Planning Committee meets. Reviews progress and all data produced to date.		
Week of December 15, 2014	All internal data posted to SMCCCD strategic planning webpage.	SMCCCD	VG
Week of January 12, 2015	Preliminary recommendations for goals, strategies, and metrics, available for SMCCCD internal review	VG	SMCCCD
Week of January 19, 2015	Strategic Planning Taskforce convenes fifth meeting. Considers preliminary goals, action strategies, and metrics	SMCCCD	VG
Week of January 29, 2015	Preliminary goals, strategies, and metrics, posted to SMCCCD strategic planning webpage. Call for comments	SMCCCD	VG
January 26, 2015	Mission, vision, and values survey closes.	VG, SMCCCD	
February 15, 2015	Comment for recommended goals and strategies ends.	VG, SMCCCD	
<i>Phase Four: Third Strategy Sessions Focusing on Synthesizing Findings, Mission and Value Statement Review, Development of Preliminary Recommendations and Strategies (February 16 to April 1, 2015).</i>			
<i>Target Date/Week</i>	<i>Tasks</i>	<i>Primary Responsibility</i>	<i>Supporting Responsibility</i>
Week of February 16, 2015	Results from the District mission survey available for internal review.	VG	SMCCCD
Week of February 23, 2015	Strategic Planning Taskforce convenes sixth meeting. Reviews mission survey.		
Week of March 16, 2015	Voorhees on site at SMCCD. Board Retreat. Strategic planning Taskforce convenes for seventh meeting. Third college-wide Forum. Third round of strategy sessions to review preliminary goals, strategies, and metrics. Internal and external interviews continue.	VG	SMCCCD
Week of March 23, 2015	Results from third college-wide forum and District mission and values survey posted to SMCCCD webpage. Comments invited.	SMCCCD	VG
March 31, 2015	Initial comment period expires.	SMCCCD, VG	n/a
<i>Phase Five: Drafting and Finalizing the Strategic Plan; Internal Strategy Sessions for Implementing Operational Planning; Final Review of All Deliverables; Coaching to Develop and Implement SMCCCD's New Education plan (April 2 to June 15, 2015).</i>			
<i>Target Date/Week</i>	<i>Tasks</i>	<i>Primary</i>	<i>Supporting</i>

Table 1			
Planning Phases, Timelines, Tasks, and Responsibilities			
		Responsibility	Responsibility
Week of April 13, 2015	Draft report of sections of the 2014-2020 SMCCCD district plan ready for review. Findings arrayed by goals, suggested strategies, and metrics.	VG	SMCCCD
Week of April 28, 2015	SMCCCD internal feedback finalized. Sections posted to SMCCCD strategic planning web page.	SMCCCD	VG
Week of May 4, 2015	Voorhees and Gonzales visit SMCCCD. Last meeting of Strategic Planning Taskforce. Final College-wide Forum.	VG, SMCCCD	n/a
Week of May 4, 2015	Internal strategy sessions for implementing operational and budget planning to support education plan.	VG, SMCCCD	n/a
Week of May 11 2015	Final review of all project deliverables. Preparation of Board Agenda	SMCCCD	VG
June 10, 2015	Voorhees and Gonzales on site at SMCCCD. Board presentation and approval.	SMCCCD	VG

QUALIFICATIONS

Experience, Core Competencies, and Overall Capabilities

Voorhees Group LLC is a company of networked consultants. We work closely with community colleges and other higher education entities. Richard A. “Rick” Voorhees founded this consultancy in September 2001. During this time we have worked strategically with more than fifty (50) community colleges to advance their capabilities to use and embed strategy and actionable data. Our registered consultants have been active as experts in higher education for several or more decades. We also bring practical experience in community colleges unmatched by other consulting companies. Our four core competencies are innovation and strategy, action research and evaluation, assessing information use and culture, and board training.

Core Competency: Innovation and Strategy

- Aligning Institutions and Learners
- Assessing Organizational Learning
- Coaching Student Success Initiatives
- Competency-based Learning Models
- Developing Information Cultures
- Designing eLearning Programs

- Embedding Strategic Goals in Planning and Budgeting
- 21st Century Institutional Practices
- Facilitating Data-Driven Education plans
- Linking Regional Accreditation with CQI
- Projecting Enrollment and Scenario Development
- Strategies for Workforce Alignment
- Transforming Research into Practice
- Policy Analysis and Research

Core Competency: Action Research and Evaluation

- Development of Research-Based Tools
- Program and Systems Evaluation
- Qualitative and Quantitative Research and Analysis
- State Policy Opportunity Analysis
- Survey and Focus Group Research
- Organizational Development

Core Competency: Assessing Information Use and Culture

- Coaching College Accreditation Processes
- Coaching Institutional Effectiveness Efforts
- Developing Competency-Based Curriculum
- Evaluating Program and Projects
- Faculty Inquiry Strategies
- Grant Writing
- Incubating Learning Outcomes Strategy
- Review of Administrative Units and Operations
- Scaffolding for Organizational Learning
- Professional Development

Core Competency: Board Training

- Community-Building Engagement Strategies
- Cultural Competency Training
- Faculty Inquiry and Research Development
- Structuring Purposeful Group Conversations
- Keynote Speeches

Dr. Voorhees brings hands-on work in community colleges including service as senior administrators including community college faculty, and state level planning for community colleges—as well as active engagement as college coaching community colleges in national success initiatives including Achieving the Dream. Dr. Voorhees has been active in the Higher

Learning Commission (HLC) as a consultant-evaluator and as a member of the Institutional Action Council (formerly the Accreditation Review Board) where he was responsible for reviewing the appropriateness of accreditation recommendations made by visiting teams.

Capabilities Specific to Strategic planning

Voorhees Group LLC is uniquely qualified to facilitate a successful education plan for SMCCCD. We bring experiences as administrators, faculty, and coaches in community colleges as well as a global perspective on the future of higher education to this work. Community colleges with whom we have worked express unanimous satisfaction with our high touch, yet decisive approach to strategic planning. Moreover, we have deep experience and credibility to engage internal and external constituencies to understand their own functioning in a wide state, regional, and national context. We help community colleges to create actionable data for informed decision-making that is simply not part of the experience base of other higher education consulting firms. The complete history of our work with large community college districts can be viewed on our [partner/client page](#) on the Voorhees Group LLC website.

Voorhees Group LLC has created a widely used range of tools designed specifically for institutions to gauge their current and future performance. These tools are freely available on our [tools webpage](#) and include:

- Checklist for Evaluating Academic Support Units
- Checklist for Evaluating Institutional Practices and Policies Impacting Recruitment, Retention, and Success for Students of Color and Low Income Students
- Developing a 21st Century Faculty
- Evaluation of Intervention Programs for Low-Income Students and Students of Color
- Institutional Data Readiness Assessment Tool
- Learner and Institutional Alignment
- Strategic planning for Student Success
- Strategic planning with Mixed Methodologies
- Strategic Research for Enrollment Management
- Tools for Developing and Evaluating E-Learning Quality
- Using Research to Align Academic and Technical Instructional Programs

We anticipate using three members of Voorhees Group LLC to assist SMCCCD in creating a successful strategic plan: Drs. Rick Voorhees, Tom Gonzales, and Alice Bedard-Voorhees. Their qualifications and roles in this project are set out below. Other than these individuals, Voorhees Group LLC reserves the right to add additional expertise to this initiative at no additional cost beyond our cost proposal above.

Rick Voorhees will serve as overall supervisor for this project. He has substantial and direct experience in facilitating successful education plans for community colleges. As a practitioner-scholar, he has been actively engaged in higher education as a faculty member, a senior administrator, and in leadership positions at the national and international levels for more than three decades. Since founding Voorhees Group LLC, he has engaged with more than 50 community colleges as well as state agencies and national organizations, in the areas of organizational development, strategic planning, and using information for better decisions. He served for a decade as a consultant-evaluator for the Higher Learning Commission (HLC) and as a member of the Accreditation Review board (now called the Institutional Actions Committee). He recently advised HLC on accreditation standards for competency-based delivery models. He also has coached student success initiatives at two of the largest community colleges in the nation, Broward College and Valencia Community College.

Dr. Voorhees has helped ten community colleges to develop thoughtful, data-enabled education plans: Broward College in Fort Lauderdale, Florida; Cañada College in Redwood City, California; City College of San Francisco; College of the Desert, Palm Desert California; Central Arizona College in Coolidge, Arizona; the Community College of Denver; Hudson Valley Community College in Troy, New York; Southwest Indian Polytechnic Institute in Albuquerque, New Mexico; Coastline Community College in Costa Mea, California, Morton College in Cicero, Illinois; and Ranger College in Texas. The Broward Community College master plan is still in use a decade later and is often cited as a “gold standard” for data-enabled community college strategic planning. An archival copy can be downloaded [here](#).

Dr. Voorhees has deep experience in developmental education at the institutional and national levels, having served as a coach and data coach for the Achieving the Dream initiative, a national effort that seeks to increase success rates of low-income students and students of color enrolled in developmental education programs. He served on the technical assistance panel for the Bill and Melinda Gates Foundation’s Developmental Education Initiative and recently concluded service as the lead consultant for Student Success BY THE NUMBERS, an initiative funded through the Greater Texas Foundation to increase data-driven culture in support of student success at fourteen Texas Community Colleges.

Rick Voorhees also has contributed a range of applied tools to higher education designed to help colleges identify specific challenges in plain language. He has been recognized by his peers as with the Outstanding Practitioner Award by the National Council for Research and Planning (an affiliate of the American Association of Community Colleges) and is recipient of the Outstanding Service Award from the Association for Institutional Research (AIR), a 4,300 member international professional association that exists to support

better decision making for higher education. He holds a Ph.D. in Adult and Higher Education from Arizona State University. His full vita can be found in Appendix A.

Tom Gonzales provides an executive perspective to this initiative based on his leadership of complex community college systems as well as a deep understanding of minority student issues in higher education. He will assist with interviews, strategy sessions, and selected public forums. Following his retirement from the community college sector where he served 35 years in senior roles, Tom Gonzales now consults widely. Twenty-nine years of his career were at the CEO/President/Chancellor level in community colleges in the West. Dr. Gonzales was also one of the original coaches for the national Achieving The Dream initiative, and has coached six colleges across the U.S. Dr. Gonzales also has chaired numerous accreditation teams. He is President Emeritus of Front Range Community College where he spent fourteen years leading the expansion from a single college to a multi-campus college serving the diverse urban and rural population of more than 16 suburban communities and 12 school districts in northern Colorado. The largest community college in Colorado, FRCC has campuses in Westminster, Fort Collins, Boulder and Longmont, a center at Brighton and extensive distance learning courses.

Before coming to Front Range Community College, Dr. Gonzales was Chancellor of the Seattle Community College District. He held positions executive positions as President of Linn-Benton Community College, Albany, Oregon; Campus Vice President at the Community College of Denver, Colorado; Dean of Instruction at San Jose City College, California, and Dean of Students at Laramie County Community College, Cheyenne, Wyoming. He recently completed his term as Chair of the Board of Directors of the National Wildlife Federation.

Alice Bedard-Voorhees specializes in design and delivery of e-learning learning for nonacademic and academic workplaces, faculty development, and assessment techniques for distance delivery. She will work with college and District employees assigned to distance education delivery, technology support for learning, and curriculum development. Her experience includes engineering statewide common course numbering and competency-based learning systems, corporate training, and creation of modularized curriculum for workforce development. The League selected Dr. Bedard-Voorhees as the first K. Patricia Cross Papers Fellowship for Innovation in the Community College. Alice is the principal for The Constant Learning Organization LLC.

REFERENCES

Overall Professional References

In addition to the strategic planning projects and references provided below, we also provide SMCCCD with these professional references:

Augie Gallegos, Past Chancellor, San Diego Community College District. Phone: (619) 307-0925. Email: Gallego6459@comcast.net

Christine Johnson, Chancellor, Community Colleges of Spokane and Past President Community College of Denver. Phone: (509) 434-5006 [work] (303) 522-7403 [cell]. Email: cjohnson@ccs.spokane.edu

Byron McClenney, Past Chancellor, Alamo Community Colleges and National Coordinator of Coaching for Achieving the Dream (retired). Phone: (512) 471-4484 [work] and (512) 470-3690 [cell]. Email: bmcclenney@mail.utexas.edu

Other References for Strategic Planning

Three additional references are provided below for strategic planning facilitation in contexts that are similar to SMCCCD's context. These references are representative of our work. We also encourage the District to look closely at the range of strategic assistance we have provided other community colleges and organizations in the area of planning. The full history of our work in facilitating education plans and other transformative work for community colleges can be found on our [partner/client webpage](#). We would be very pleased to provide additional references for any of our work that interests SMCCCD in the selection process.

Project: Broward Community College Education Master Plan

- a) Address: 111 East Las Olas Boulevard, Fort Lauderdale, FL 33301
- b) Contact: Dr. Larry Calderon, Past President; Phone: (954) 262-7552 [work]; Email: lc@nova.edu; Dr. Ted Wright, Former Assistant to the President for Strategic Initiatives; (954) 581-7820 [home] and (954) 257-4879 [cell]; Email: twrightbcc@comcast.net
- c) Comments: In conjunction with college staff, faculty, business leaders, and citizens of Broward County, Voorhees Group LLC facilitated an Education Master Plan for Broward Community College (BCC). The process involved developing an environmental scan, planning assumptions, and projections for programs, faculty, and staff to meet emerging demographic changes.

This study also includes a competitor analysis. Voorhees Group conducted primary and secondary research to present a future view of the District to the year 2015, including forecasts of employment by high technology sector and the corresponding match with BCC's programs.

Project: Coastline Community College Education Master Plan

- a) Address: 11460 Warner Avenue; Fountain Valley, CA 92708
- b) Contact: Dr. Lori Adrian, President. Office Phone: (708) 656-8000 x 2277; Cell Phone: (904) 759-0949; Email: ladrian@coastline.edu
- c) Comments: Voorhees Group LLC facilitated an education master plan for Coastline, a college that originally was founded as a "college without walls" and now faces significant competition in online curriculum development and delivery. Coastline is also well known for delivery of degree and certificate programs to military personnel. This plan consisted of internal and external strategy sessions, an environmental scan, and an analysis of instructional data and online delivery capability, and a review of the District's ESL programs. Enrollment scenarios modeled the effect of U.S. Department of Defense policy changes effecting military education. As of July 27, 2014, Coastline's Educational Master Plan was available on the District's website: <http://documents.coastline.edu/research%20and%20planning/Institutional%20Plans/Educational%20Master%20Plan/Coastline%20Education%20Master%20Plan%202011-2016%20June%206%202011.pdf>

Project: Morton College Education plan

- a. Address: 3801 S. Central Ave.; Cicero, IL 60804-4398
- b. Contact: Dr. Keith McLaughlin; Vice President of Institutional Advancement; Office Phone: (708) 656.8000 x 2277; Cell Phone: (904) 759-0949; Email: Keith.McLaughlin@morton.edu
- c. Comments: During challenging times for the Morton College, Voorhees Group LLC facilitated an education plan built around student success as an overarching goal. Morton College is a Hispanic Serving Institution undergoing substantial demographic change in its service area. Morton used its new education plan to help meet, in part, HLC expectations for its subsequent comprehensive team visit

APPENDIX A
VITA FOR RICK VOORHEES

Richard A. Voorhees, Ph.D.

57 Cardinal Court
Glenwood Springs, Colorado 81601
303/918-1981 (office)
rick@voorheesgroup.org
rick.voorhees@gmail.com

Selected Consultancies

City College of San Francisco. Facilitation for developing an Education Master Plan.
November 2013 to May 2014.

Colorado Mountain College. *Meeting the Training Challenge in Renewable Energy Fields*,
White Paper. A survey of learning objects and resources for curriculum development
in sustainable energy, February 2014.

Ranger College. Facilitation of a strategic plan. April to October 2014.

Council for the Advancement of Experiential Education. Evaluation of Maps to
Credentials: Creating an Integrated Prior Learning Assessment Model, with Alice
Bedard-Voorhees, August 2010 to August 2014.

Student Success BY THE NUMBERS. Lead Consultant. Project funded by the Greater Texas
Foundation and coordinated by the University of Texas-Austin to increase data
capacity and use among Texas community colleges, February 2011 to present.

Morton College. Facilitation of strategic planning. February to June 2012.

Jobs for the Future. Formative and Summative Evaluation of the North Carolina Breaking
Through Career Pathways Initiative, February 2010 to October 2012.

Government of Dubai, United Arab Emirates. Knowledge and Human Development
Authority [equivalent to a Ministry of Education], advice on strategic workforce
planning for postsecondary education in the Emirate and member of the inaugural
University Quality Assurance International Board, October 2007 to November 2011.

Social Program Evaluators and Consultants (SPEC). Higher education content expertise for
evaluating Lumina's Goal 2025, a nationwide initiative to increase higher education
productivity and degree attainment, August 2008 to present.

Sultanate of Oman. Drafted national standards for higher education quality assurance, April 2011 to November 2011.

Developmental Education Initiative, member of the nationwide technical assistance panel funded by the Bill and Melinda Gates Foundation to improve student outcomes in the community college, June 2009 to 2011.

Baton Rouge Community College, coaching for a Lumina-funded demonstration project to improve success rates of low-income students and students of color, January 2007 to 2010.

Bossier Parish Community College, coaching for a Lumina-funded demonstration project to improve success rates of low-income students and students of color, January 2007 to 2010.

Ivy Tech Community College, statewide data coaching for Ivy Tech's participation in the national Achieving the Dream initiative, June 2009 to August 2010.

Achieving the Dream, coaching and data coaching for a nationwide initiative involving 54 community colleges and universities to locate achievement gaps for low-income and students of color and to identify best practices for closing those gaps, June 2004 to 2010.

Valencia Community College. Data coaching for Achieving the Dream, August 2004 to August 2010.

Broward College. Data coaching for Achieving the Dream, August 2004 to August 2010.

Association for Institutional Research, Ad Hoc Task Force on Evaluation of Institutional Research Offices and training workshops for tribal colleges and universities to increase data capability, August 2004 to 2010.

Australian University Quality Agency, accreditation (auditing) reviews for Australian colleges and universities, March 2005 to 2010.

U.S. Department of Education, Office of Vocational and Adult Education. Facilitator for "Community Colleges Can!" a fast track, collaborative learning experience in which mentee colleges receive coaching, technical assistance and guidance from a mentor college team, September 2008 to 2010. Mentor/Mentee community: Pasadena City College, Mt. San Antonio College, and Southeast Kentucky Technical and Community

College.

Baton Rouge Community College, facilitation of Strategic Planning for New Student Task Force, April 2009.

JBL and Associates through the Education Credit Management Corporation, senior advisor for PERSIST, A Comprehensive Guide for Student Success in Higher Education, June 2008 to June 2009.

Doña Ana Community College, Las Cruces, New Mexico, data coaching for Achieving the Dream, July 2005 to 2009.

JBL and Associates, Inc., editorial assistance in compiling the Field Guide for the national Achieving the Dream initiative, January 2009 to November 2009.

Jobs for the Future, national evaluation for Breaking Through (a career pathways initiative for low-skilled, low-literate adults), February 2009 to November 2009.

Morton College, Cicero, Illinois, Keynote for Opening Fall Days, August 2009.

Broward College, coaching for SACS substantive change to create baccalaureate programs. July 2009.

Southwestern Indian Polytechnic Institute, Albuquerque, New Mexico. Facilitation of a strategic planning process for this tribal college, April 2009 to September 2009.

tBP Architects, Newport Beach, California, Design of an Academic Plan Proposal for an Education Master Plan, October 2009.

Triton College, Illinois, strategic planning facilitation and review of policies and procedures for student success, December 2009.

University of Stellenbosch, Review of the Institutional Research and Planning Unit and Strategic Planning Function, South Africa, September 2009.

Broward College, facilitation of institutional effectiveness workshop, Cabinet Retreat, July 2008.

College of the Desert, Palm Desert, California, facilitation of a strategic education master plan, September 2007 to July 2008.

- Hangzhou Normal University, Hangzhou, People's Republic of China, advisory for strategic planning, September to December 2008.
- Ivy Tech Community College of Indiana, statewide and campus enrollment projections and enrollment management scenarios for 23 campuses, January to May 2008.
- Louisiana Technical Colleges, Region 6. Development of a plan for faculty development and eLearning capacity building, March to June 2008.
- Research Evaluation Associates for Latinos (REAL), advisory to project to embed competency-based curriculum management in a community of practice, [with Insites Consulting], July 2004 to September 2008.
- State of Michigan, Department of Labor and Economic Growth, white paper for feasibility of statewide applied baccalaureate degrees in community colleges, January to April, 2008.
- Alamo Community Colleges, analysis of district-wide use of data and information and administrative review of institutional research and informational technology areas, February to April 2007.
- Association for Collegiate Schools of Planning. Research to support faculty performance assessment for accredited planning programs, November 2006 to November 2007.
- Cañada College, Redwood City, California, facilitation of a strategic planning process, September 2006 to April 2007.
- Broward Community College, facilitation of eLearning Strategic Plan, January to June 2006.
- Colorado Community College System, evaluation and planning structures for programs designed to help low-income and minority students succeed, March 2004 to June 2007.
- Economic Development Board of Bahrain, panel member (through Australian University Quality Agency) for first locally initiated higher education quality audits, August to November 2007.
- El Paso Community College, workshop on evaluation on assessing interventions for student success, October 2007.

- Louisiana Community and Technical College System, development of data collection processes, templates, and analysis plan to support the LCTCS Strategic Plan, April to July 2007.
- Midwestern Higher Education Compact, Minneapolis, Minnesota, development of a white paper for increasing workforce development capacity and state-level coordination in 13 Midwest states, June to November 2007.
- Oman Accreditation Council, panel member for first university quality audit conducted in the Sultanate, February 2007.
- Virginia Community College System, review of institutional research function at the central office and analysis of steps needed to produce actionable information, March to June 2007.
- Association for Institutional Research, evaluation of nationwide graduate certificate programs in institutional research at selected universities, August 2005 to March 2006.
- Bismarck State College, feasibility study for this two-year college's first baccalaureate degree program in energy management, January to April 2006. Program subsequently approved by the North Dakota University System Board.
- Corporation for a Skilled Workforce (CSW), development of white papers connecting education and the economy for the 2006 state and mid-term federal elections, July 2006.
- Skyline College, San Bruno, California, facilitation of an education master planning process, February to May 2006.
- Australian University Quality Agency. Audit [accreditation] panelist. University of Tasmania, Summer 2005.
- University of Texas at Austin, Community College Leadership Program, resident faculty for the developmental mathematics institute and board of trustees training for Gulf Coast community colleges, November 2006.
- Broward Community College, Fort Lauderdale, Florida. Facilitation of an education master planning process, September 2004 to May 2005.

American Indian College Fund, assessment and evaluation of tribal college and university construction projects, faculty demographic and attitudes, and accountability, January 2003 to August 2005.

Council for Assessment of Experiential Learning (CAEL), community college subject matter expert for the Adult Learning Facilitating Institution (ALFI) survey project, February 2005.

Hudson Valley Community College and the New York State Energy Research and Development Authority study to assess the feasibility of locating programs in a developing clean energy park, February to July 2005.

Central Arizona College, facilitation of an strategic planning process, February to May 2004.

Community College of Denver, development of strategic planning processes and assistance with AQIP accreditation, February to August 2004.

Huazhong University of Science and Technology, Wuhan, People's Republic of China, training for Chinese institutional research personnel in higher education management, specifically on models for financing higher education, October 2004.

Metropolitan Community College, Omaha, Nebraska. Audit of institutional research office and college-wide use of information, June to August 2003.

National Tsing Hua University, Taiwan, competency-based curricula, globalization, and professional writing training workshops, October 2003.

State Council for Higher Education in Virginia, statewide enrollment projections for first-time freshmen enrollment in public colleges and universities, February to May 2003.

State System of Higher Education in South Dakota, statewide training to increase the use of management research in public universities, September 2003.

Formal Employment

2002-present, Principal and Owner, Voorhees Group LLC, Glenwood Springs, Colorado

2002-Director, Education Policy Initiatives/Senior Advisor, State Higher Education Executive Officers, Denver

1995-present Graduate Faculty/Dissertation Advisor, University of Northern Colorado, University of Colorado–Denver, Denver University, Colorado State University

1976-present Various Faculty Appointments, Community Colleges of Colorado, Arapahoe Community College, South Mountain Community College, Sitting Bull College (part-time).

1996–2002 Associate Vice President for Instructional and Student Services, Community Colleges of Colorado

1994-1996 Director, Research and Planning, Community Colleges of Colorado

1992-1994 Vice President for Student Life, Black Hills State University

1987-1994 Dean of Students, Black Hills State University

1987 Dean of Educational Support Services, Arapahoe Community College

1985-1987 Director of Marketing, Planning, and Research, Arapahoe Community College

1983-1985 Director of Institutional Research, Arapahoe Community College, Littleton, CO

1983 Faculty Associate, Arizona State University

1980-1983 Research Associate, Arizona State University

1978-1980 Director of Upper Division Studies, Standing Rock Community College, Ft. Yates, ND

1974-1978 Junior High Teacher, Standing Rock Indian Reservation, Little Eagle, SD

Education

Ph.D., Arizona State University, Higher and Adult Education, 1983

M.A., University of North Dakota, Counseling and Guidance, 1978

B.S. Ed., University of North Dakota, Elementary Education, 1974

Selected Publications

- Voorhees, R.A. & Bedard-Voorhees, A. (in press). Paths to the river: Designing competency-based learning. In C. M. Reigeluth & Beatty, B. (Eds.) *Instructional-Design Theories and Models [The Green Book]*. New York: Routledge.
- Voorhees, R.A. & Cooper, J. (in press). Opportunities and obstacles to effective planning in higher education: Data sources and techniques. In M E. Menon (Ed.) *Using Data to Improve Higher Education Research, Policy and Practice*. Rotterdam, Netherlands: Sense Publishers.
- Voorhees, R. A. & Lee, J. (December, 2009). Basics of longitudinal cohort analysis. In D. Jenkins and Byron McClenney (Eds.) *Mini Guides [to accompany the Achieving the Dream Field Guide]* Chapel Hill, NC: MDC.
- Voorhees, R. A. (2008). Institutional research's role in strategic planning. In D. R. Terkla (Ed.) *Institutional Research: More than Just Data*. New Directions for Higher Education, No. 141. San Francisco, CA: Jossey-Bass, Inc.
- Voorhees, R. A. (2008). Applying mixed methods techniques in strategic planning. In T. T. Ishitani (Ed.). *Alternative Perspectives in Institutional Planning*. New Directions for Institutional Research. San Francisco, CA: Jossey-Bass, Inc.
- Voorhees R. A. (2007). *Understanding American Higher Education Finance*. In J. Zhao (Ed.) Qingtao, China: Chinese Ocean Publications Inc.
- Voorhees, R.A. & Milam, J. (2006). The Hidden College: Noncredit Education in the United States. Winchester, VA: HigherEd.org.
- Voorhees, R.A., & Smith, G. P. (Eds., 2006). Community College Student Transitions. *Journal of Applied Research in the Community College*, 13(2).
- Jacobs, J., & Voorhees, R.A. (2006). The community college as a nexus for workforce transitions: A critical essay. In Voorhees, R.A. and Smith, G. P. (Eds.), *Community College Student Transitions*. *Journal of Applied Research in the Community College*, 13(2), 133-139.
- Voorhees, R.A., & Harvey, L. (Eds.). (2005). *Workforce Development and Higher Education: A Strategic Role for Institutional Research*. New Directions for Institutional Research. San Francisco: Jossey-Bass, Inc.

- Voorhees, R.A. (2005). Using research to align programs [Institutional research and new program development] (pp.29-39). In Voorhees, R.A., & Harvey, L. (Eds.). *Workforce Development and Higher Education: A Strategic Role for Institutional Research*. New Directions for Institutional Research. San Francisco: Jossey-Bass, Inc.
- Voorhees, R. A. (2001). *Measuring What Matters: Competency-Based Models in Higher Education*. New Directions for Institutional Research. San Francisco: Jossey-Bass, Inc.
- Voorhees, R. A., & Zhou, D. (2000). Intentions and goals at the community college: Associating student perceptions and demographics. *Community College Journal of Research and Practice*. London, UK: Taylor & Francis.
- Voorhees, R. A. (1997). Student learning and cognitive development in the community college. In J. C. Smart (ed.), *Higher education: Theory and Research*. New York: Agathon.
- Voorhees, R. A. & Hart, S. A. (1989). A tracking scheme for basic skills intake assessment. In T. Bers (ed.), *Student Flow in the Community College*. New Directions for Community Colleges. San Francisco: Jossey-Bass, Inc.

Selected Professional Activities

- Past President. Association for Institutional Research, an international professional association for management research, policy analysis and planning in higher education.
- Outstanding Service Award, Association for Institutional Research, 2010.
- Auditor. Australian Universities Quality Agency, 2004 to 2010. Audit of the University of Tasmania and pilot audits of two universities in Bahrain.
- Member. American Association of Community Colleges/Association of Community College Trustees Joint Commission on Federal Relations, 2000 to 2002.
- Consultant-Evaluator and Accreditation Review Council Member. North Central Association of Schools and Colleges, Higher Learning Commission, 1993 to 2003.
- Practitioner Award by the National Council for Research and Planning, AACC Affiliate, 1998.

Chair. Publications Committee and Member of the Executive Board, Association for Institutional Research, 1997 to 2000.

Advisory Board Member. The Cooperative Institutional Research Project Freshman Survey. American Council on Education, 1998 to 2001.

Chair and Member. National Postsecondary Education Cooperative U. S. Department of Education. Advisory to the U.S. Department of Education. Chair for national taskforce on competency-based initiatives, 1998 to 2000.

President. Colorado Association for Planners and Institutional Researchers, 1994-95.

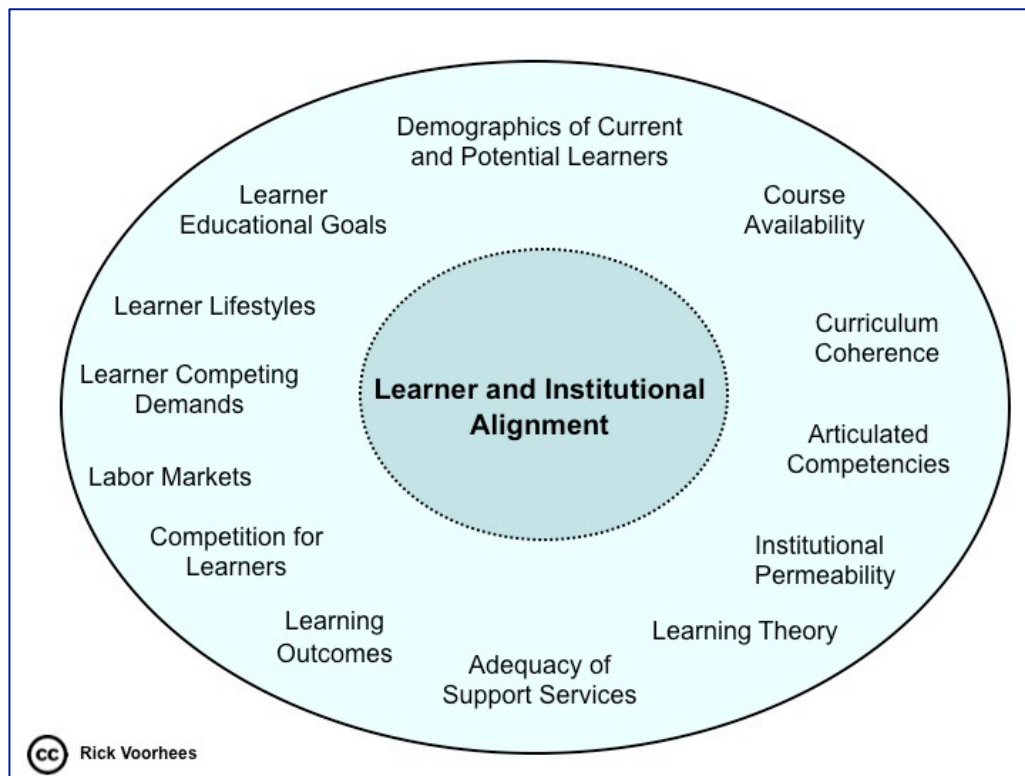
Associate Editor for Community Colleges. Higher Education: Handbook of Theory and Research, Agathon Press, New York, 1995 to 1999.

Advisory Board. Development of Adaptive Computerized Testing. Educational Testing Service, 1990 to 1992.

Selected as recipient of the Best Paper Award, Association for Institutional Research, 1985.

Consulting Editor. Research in Higher Education, Human Sciences Press, New York, 1987 to 1998.

APPENDIX B
INSTITUTIONAL AND LEARNER ALIGNMENT



Learner Objectives are a starting place for learner/college alignment. What are the learner’s reasons for enrolling in the District, a class, or a particular program? Are those objectives short-term or long-term? Are they fixed or are they changeable? Can the District use knowledge of learner objectives to add clarity to its efforts to demonstrate accountability?

Understanding **Current and Potential Student Demographics** helps the District to serve current students and to anticipate the needs of future students.

The match between **Curriculum Availability** and learners is critical to many decisions--especially those made by working adult students--about whether they will enroll for a given class or program. Availability applies to scheduling and format decisions made by College for learning experiences and classes.

Learners will want to know and predict **Curriculum Coherence** to understand how their learning experiences will lead to other learning experiences and competencies.

The District's ability to express its curriculum as **Articulated Competencies** is key to evaluation efforts as well as to recruiting students and potential business and industry partners.

Institutional Permeability refers to the ease with which learners can navigate the institutional bureaucracy to gain admission, apply for financial aid, access academic advising, register for classes, and interact with officials. Institutional permeability also refers to the perceptions of the ease of interacting with the District carried by the community, potential business/industry partners, and prospective learners.

There is no single, correct **Learning Theory** that colleges can use to align their programs. Rather, questions need to be raised about which combination of learning theories among the several dozen that have been applied to college-level learning are most appropriate for the learners now served by the District and the objectives that they bring with them?

What happens in the classroom is critical and so, too, are **Support Services**. The District already has a variety of support services. Best practice brings those services to the table early when designing, developing, and deploying new programs.

Competition for Learners has never been stronger in higher education as learners have more options now than perhaps ever before. Colleges compete for traditional-aged learners chiefly from other public community colleges and for non-traditional aged students from private providers who are nimble and understand that for many learners, time is money.

Learning Outcomes has become the by word for assessing institutional quality. What does a college's intended learning outcomes say about its learners? Do learners understand what outcomes they will gain by their investment in the District's colleges?

Labor Markets dictate the foundation for an effective array of programs, but may not always provide a failsafe means of starting or eliminating programs without substantial contact with the business and industry niche for which the program is intended. San Mateo County Community College District also can use its knowledge of labor markets to create program niches for its learners.

Understanding the influence of family, job, and civic engagements that represent **Learner Competing Demands**, especially for community college students, can help design programs that build upon these realities so that they compliment, rather than detract from the learning experience.

In a related strand, understanding the range of ***Learner Lifestyles*** and their influence on learning styles and preferences can pay dividends. One such example is the use of cell phones by learners from all income groups. This technology is often used hourly within self-defined communities or networks. How can those networks be used to promote interaction with the curriculum and success within programs?

APPENDIX C
TEMPLATE FOR STRATEGIC PLANNING DATA

DATA COLLECTION TEMPLATE
SAN MATEO COUNTY COMMUNITY COLLEGE DISTRICT

Voorhees Group LLC will work with institutional research personnel at each of the District's three colleges and the District to harvest data in these key areas. Note that no personally identifiable data are requested.

1. Headcount course enrollment by the TOP codes by location and in total, all terms in academic years 2009-10 to 2013-14.
 - Course Prefix
 - Course Number
 - Course Title
 - Reference Number
 - Campus/Location (Room/Building)
 - Days (MRWTFSS)
 - Beginning Time
 - End Time
 - Time Block
 - Division
 - Department
 - Headcount Enrolled
 - Course Credit Hour
 - Faculty Name
 - Faculty FT/PT Status
 - CIP Code
2. Fall 2009 and Fall 2013 student demographics by campus (and other locations) and total: a) gender, b) age ranges [15-17, 18-19, 20-24, 25-29, 30-34, 35-39, 40-44, 45-49, 50-54, 55-59, 60-64, 65+], c) full-time/part-time status, d) race/ethnicity.
3. Numbers of students transferring to 4-year and 2-year institutions and their transfer destinations, with and without degrees, 2009-10 through 2013-14.
4. Numbers of career and technical degree and certificate graduates employed within six months.
5. Results of student and graduation satisfaction surveys for the most recent years in which they may have been administered.
6. Total number of applicants, registrants, and attendees, fall terms 2009 to 2013 by

race/ethnicity. Include these subpopulations:

- Immediate high school graduates (within 12 months of graduation)
 - Working-age adults (24 to 44)
 - Retirement-age adults (55 and older)
7. Headcount financial aid recipients by race/ethnicity for fall terms 2009 and 2013 in these categories:
 - Pell grants
 - Federal loans
 - Institutional grants
 8. Number of students entering the District with GEDs by campus location fall term 2013
 9. Number of students placed in developmental courses by location by subject, consecutive fall terms 2009 to 2013.
 10. Low-income students and students of color who:
 - Complete remedial courses and move to credit-bearing courses
 - Enroll in and complete gatekeeper, college-level courses
 - Complete courses taken with “C” or better
 - Re-enroll from one semester to the next
 - Earn certificates and degrees
 11. Noncredit offerings for the past five falls, by headcount, location, and course/experience description.
 12. Contract training offered to businesses not captured above.
 13. Number of Workforce Investment Act participants referred to San Mateo County Community College District by Local One-Stops, Fall 2012
 14. Gender, race/ethnicity, and age of full-time and part-time employees by primary occupational activity (IPEDS classification)
 15. Full-time Faculty by CIP Code assignment by age as of Fall 2013