



Institutional Effectiveness Partnership Initiative Advisory Committee
May 15, 2015, 10:00 am-3:45 pm
Sheraton Grand Sacramento
Meeting Summary

Members in Attendance

Last	First	Wkgrp*	Last	First	Wkgrp*
Bandyopadhyay	Santanu	PD	Lee	Matthew C.	TA
Barton	Michelle	Ind	Leong	Tim	PD
Benson	Mitchel	Ind	Lief	Christopher	PPP
Blackwood	Kathy	Ind/TA	Ly	Pearl	PD
Bruno	Julie	TA/PD	Meuschke	Daylene	PD
Buckley	Jerry	PD	Midkiff	Michael	TA
Burris	David	PD	Napier	Andrew	PD
Carr	Leslie	PD	Randall	Meridith	PD
Chadwick	Jan	TA	Sandoval	Carmen	PD
Dieckmeyer	Diane	TA	Schardt	Jan	PD
Druley	Jennifer	PD	Scroggins	Bill	PD
Fiero	Diane	PD	Skinner	Erik	Ind
Goold	Grant	Ind	Stanskas	John	Ind
Greaney	KC	Ind	Stanton	Joe	TA
Gribbons	Barry	Ind	Steenhausen	Paul	PD
Hayward	Craig	Ind	Tena	Theresa	PPP
Holland	Breanne	PD	Todd	James	PD
Kovrig	Neill K.	PPP	Vo-Kumamoto	Tram	Ind
Lamanque	Andrew	PPP	Webb	Catherine	PD

Resource Persons/Evaluators in Attendance

Last	First	Wkgrp*	Last	First	Wkgrp*
Harrington	Deborah	PD	Spano	Jeff	TA
Larson	Erin	TA	Van Ommeren	Alice	Ind
Slimp	Ronnie	PPP			

Guests in Attendance

Last	First	Wkgrp*	Last	First	Wkgrp*
Adams	Gary	Ind	Hoig	Todd	Ind
Fuller	Ryan	Ind	Nguyen	Alyssa	

*Wkgrp: Ind = IE Indicators; PPP = Policy, Procedure, and Practice; PD = Professional Development; TA = Technical Assistance

I. General Session 1

- A. The session opened with introductions and an Education Moment from Julie Bruno.
- B. Theresa, Matthew, Barry, and Paul reported on IEPI progress to date and answered questions as they arose; areas highlighted included the following:
 1. Plans to improve messaging about IEPI.
 2. PRT visits to date, and the need to encourage client colleges to inform visit participants about IEPI and the purposes of the PRT before their arrival.
 3. Goal-setting using the Indicators Portal.
 4. Preliminary work on additional indicators, such as access, equity, and wage and employment data. Version 2.0 indicators will likely represent a more significant change than those for 2015-16.
 5. The Student Support Redefined workshops were very successful, and well received.

6. Additional professional development workshop topics are still in development.

II. Workgroup Sessions

A. *Institutional Effectiveness Indicators (Barry)*

1. Discussion of Version 2.0
 - a. We need to complete Version 2.0 by April.
 - b. Version 2.0 can be shared at ASCCC Plenary in April.
 - c. Review of 2.0 Indicators
 - i. Accreditation Status. We need to ensure that new statuses are included, maybe adding reaffirmed with 1 year visit.
 - ii. State and Federal Programmatic Compliance. The text should be updated to read, "Overall audit opinion on financial statement."
 - iii. Fiscal Stability
 - (A) Fund Balance. Fund balance is problematic in some instances with labor negotiations. It also can be confusing since many boards set policy on a floor rather than aspirational goals. In some instances, the goal did lead to interesting and productive conversations. Ultimately, the group recommended retaining the indicator. There should be conversations on how the indicator ought to be used, such as early warning.
 - (B) Future indicators that should be considered include OPED Trust, STRS/PERS liability, Debt Ratio, and Long Term Fiscal Planning. The Government Finance Officers Association can also be a good resource.
2. Year 2 Indicators
 - a. Success Rate. The IEPI success rate ended up being different from the ACCJC indicator in that it was annual rather than Fall. The indicator was intended to be the same to bring alignment between the systems, The IEPI indicator should be changed to Fall.
 - b. We should add an optional indicator for the college to define and report on.
3. Report. A report with all indicators and their disaggregations would be helpful. This could look similar to the scorecard.
4. Skills Builder. The measure uses SAM A, B, and C course students who leave one year later and don't attend any other college. Looks at changes in wages.
5. We should pilot version 2.0 metrics in 2015/16.
6. We should set aside time at each meeting to present and discuss model research used for analytic purposes.

B. *Technical Assistance Process (Matthew)*

1. Update on PRTs
 - a. Logistics
 - i. Most PRT leads are choosing to handle logistics for their teams.
 - b. Evaluation
 - i. We will be gathering structured evaluative comments from both team and college.
 - ii. Matthew debriefs with all team leads and some client CEOs after first visit to find out what we should have done better and what we should do before next visit.
 - iii. Will try to compare perceptions of college with perceptions of the team.
 - iv. Survey asks:
 - (A) about fit and examples of why there was a good or not so good fit.
 - (B) how much time team members are spending, including time in advance of visits, and the range of time spent
 - (C) about receptiveness of college to PRT process. Although there was some confusion about the PRT's purpose, colleges were generally receptive, with the exception of one group of folks at one college.
 - (D) if training was sufficient preparation.
 - (E) some open ended questions.

- v. The hope is that responses will help shape the process for next round. Jan suggested asking teams if they felt that the college representation was sufficient during the visit.
- c. Kathy Blackwood's Site Visit Debrief (Berkeley City College)
 - i. Team spent time together in training, spent 1.5 hours together before visit, and held two conference calls.
 - ii. Seemed to team as though there had not been a collegial process in developing the LOI.
 - iii. PRT divided into two teams: resource allocation model and enrollment management.
 - iv. Ended up spending two hours with the president; would have been nice to have CBO, etc. present.
 - v. One of Kathy's roles will be to do professional development around the budget process.
 - vi. Visit seemed too short and PRT had to spend a lot of time explaining their purposes.
 - vii. Intent was for team and cabinet to meet the night before, but it didn't work out. Group agreed this would be a good practice and help maximize use of the next day.
 - viii. Group agreed that having lead and entire group together is important at training, when team gets its first look at the LOI.
 - ix. ACBO has committed to ACCJC that if a CBO is needed on a team, they will find one. Kathy noted that a similar commitment could be made for IEPI. Also, there will be some presentations at the ACBO conference, which should help gain PRT volunteers.
 - x. Kathy observed that participating on the team is a neat learning experience, and members will learn a lot in the process that they can bring back to their own college or district.
- d. College Interviews
 - i. One members suggested making sure that everyone being interviewed at the college is really necessary to the process. Some groups in the Spring set of colleges were quite large.
- e. Student Participation
 - i. Many colleges did not include a single student in the conversation. Matthew will emphasize the need to cast with a wide net, and Julie Bruno will mention to faculty senates to make sure students are included.
- 2. Webinar and Workshop Evaluation Preliminary Results
 - a. There were about 30 responses on the webinar and about 7 on the training workshop. About 1/3 of the site visit members had attended one of the IEPI workshops.
 - b. Webinar
 - i. Rating on the understanding of the three visit process was low, which is not crucial in training, but important at the time of being put on a team.
 - ii. Everyone knows to call Catherine about logistics.
 - iii. Webinar facilitator was rated fairly high, but we can improve some sections for next time. There was a wide range of responses.
 - iv. Single item receiving the most positive feedback was the Q and A.
 - v. Need to acknowledge in some fashion the presence of every volunteer who is in or not in the pool of experts. Matthew will look into making this happen.
 - c. April 3rd PRT Workshop at the Chancellor's Office
 - i. Best part was David and Kimberly on three things to do in technical assistance visits, three things not to do, and one success story.
 - ii. Appreciate inquiry session rating was not as high, but PRT leads later uniformly reported that they had used the approach, and strongly recommended keeping it in the training.
 - iii. Discussion about the LOIs in teams was clearly the favorite activity of the day.
 - iv. Facilitator ratings were generally good.

3. Next PRT cycle
 - a. Matthew has refined the volunteer survey re dates available, areas of expertise, etc., based on needed improvements identified in the first cycle.
 - b. Will start making matches for 15 colleges in June.
 - c. Foothill College scope of assistance has changed to assisting in the PRT training.
4. Training on PRTs in the Next Cycle
 - a. The group reviewed the May 12, 2015 draft document on face-to-face training workshop ideas.
 - b. We will have to expand training to accommodate number of folks needed for 15 new visits, which could be a large group.
 - c. May need to hold trainings in multiple locations.
 - d. Will want to bring back some of the first-time PRT members to share their experience.
 - e. Will want to keep dos and don'ts panel.
 - f. Want people coming in with a positive attitude, not those looking to find something wrong.
 - g. Gauging climate issues should be included in training.
 - h. Want to include walking through the accreditation evaluation reports (self-study, mid-term reports, final reports, evaluation reports) so members can see how they are structured and how to use them as an important source of preliminary information.
 - i. There is a lot of information we want to cover in the training, but we don't want to make them work during lunch. Rather, let them get to know each other better.
 - j. Matthew purposely looked for utility players in first round of PRTs to help ensure success. Members of the next set of teams might each have narrower expertise, but facilitated breakout sessions can help broaden understanding on certain topics.
 - k. The group decided to schedule only one slot for the breakouts, to allow teams to spend two full hours in the following slot for discussion, getting to know one another, planning, etc.
 - l. Using the actual LOIs was extremely helpful.
 - m. Not yet at the point of repeat training for anybody, as no members will have completed their three visits. Everyone in Fall trainings will be a new PRT member. Eventually, we will return to the idea of full training for new members and a refresher training for repeat members.
 - n. Matthew will work with Julie Bruno to confirm what needs to go through the academic senate in terms of faculty involvement in training.
 - o. PRT members should know their college assignments before the day of training. We have to run the members by the client-college CEO first.
 - p. We want to make sure we don't put too much pressure on PRT members as we don't want the experience to be overwhelming in terms of time, reading, etc. Also, we want the training session to be the real beginning of the process so team members don't start looking for solutions until they understand the IEPI way, have a chance to talk with their team, etc.
 - q. The teams that had the most players at the training seemed to be the best prepared coming out of the training.
5. Concluding Comments
 - a. By next meeting, June 25th, we will have more clarity about exactly how this will play out for the next round, including the training and the webinar dates.
 - b. If Matthew needs input before the next meeting, he will solicit it from the workgroup members via email.
 - c. It will be important that we pin down the training dates as quickly as possible. Matthew and Andrew will identify the best dates.

C. Professional Development (Paul)

1. Welcome and Introductions
2. Governor's 2015-16 May Revision Proposal Related to Professional Development
 - a. Handout – May Revise Budget Bill Language on IEPI.

- b. Proposed \$15M base increase (\$3M increase for technical assistance and \$12M for online and on-ground PD and trainings). PD funds would help with hiring staff for the online clearinghouse (such as a librarian/curator), technical support, administrative assistance, content development, etc.
- 3. Debrief of May 2015 Regional Workshops on Student Support (Re)defined (SSRD)
 - a. Positives and areas to improve on for next time
 - i. Overall very positive feedback from attendees at Laney and College of the Canyons.
 - ii. For next time, think about adding a student panel and giving more time for guest colleges to share testimonials on their experiences with SSRD.
 - b. Possible locations in the fall
 - i. Far North (Shasta College), L.A./Inland Empire, San Diego, Central Valley.
 - ii. We should think about having more Friday workshops.
- 4. Future Regional Workshops
 - a. Update: Partnering with Association of Chief Business Officials (ACBO) on enrollment management (EM) workshop in August 2015
 - i. ACBO had originally scheduled a one-day workshop for August 7 at College of San Mateo.
 - ii. The thinking now is to incorporate more voices (such as human resource officers and researchers) and make it a 2-day workshop (Day 1-August 5 and Day 2-August 6).
 - iii. The ACBO board is discussing this issue next week at their board meeting.
 - iv. IEPI will plan to offer at least one more EM workshop in the South (with or without ACBO).
 - b. Potential workshop on concurrent/dual enrollment (Guest: Pam Walker, CCC Chancellor's Office)
 - i. Pam would like to put together a work group to develop a toolkit on how to do dual enrollment. Could follow up with a workshop in Sacramento.
 - ii. Pam wants to include the RP Group in the development of effective practices.
 - iii. Could have colleges that are running successful dual enrollment programs present/share (one to check out: Alamo College in Texas).
 - iv. Information re concurrent/dual enrollment is needed for parents, students, and high school faculty/staff (public relations).
 - v. Would make sense to wait for passage of AB 288 (concurrent/dual enrollment bill currently in the legislature) before finalizing the toolkit/holding the workshop.
 - vi. Jerry B. will help on the project. James Todd will talk to David Morse about getting an ASCCC representative. Will also need other representatives from various groups.
 - c. Update: Sketching out other regional workshops for 2015-16
 - i. Handout – Calendar of IEPI Regional Workshops
- 5. Online Clearinghouse Project
 - a. Layout of clearinghouse
 - i. Handout – Judicial Branch of California's portal of effective practices.
 - ii. Comments: Work group members liked the icons on Judicial Branch's site (makes navigation easy).
 - iii. Standardized format is needed for material in CCC clearinghouse (similar to Judicial Branch's set up).
 - iv. CCC Clearinghouse should require content submitters to include their contact information so others can follow up for more information. Should also think about having effective practices include any relevant local context that other colleges/personnel should be aware of.
 - v. Effective (or high impact) practices should come with a general disclaimer ("results may vary") since what works in one place and with one program may not work somewhere else.

- vi. Access to videos and online resources will be helpful to client colleges receiving technical assistance through the Resource Teams.
- vii. Keep in mind that online clearinghouse is not by itself enough—needs to be supplemented by in-person trainings and other professional development strategies.
- b. Workgroup formed a subgroup to develop a taxonomy of topics. Will use RP Group’s taxonomy (found on its website under “Resources”) as a starting point.
 - i. Jerry Buckley
 - ii. Leslie Carr
 - iii. Deborah Harrington
 - iv. Pearl Ly
 - v. James Todd
- c. Also created a subgroup to work on a content-submission form:
 - i. Breanne Holland
 - ii. Diane Fiero
 - iii. Carmen Sandoval
 - iv. Bill Scroggins
 - v. James Todd
- d. Criteria for inclusion in planned speakers/experts bureau (directory)
 - i. Per current policy, any speaker who presents at a CCC conference is entered into the directory.
 - ii. Work group members agreed that outside speakers who would like to be added to the directory should be required to obtain a reference from a CCC professional development coordinator (or other CCC personnel).
 - iii. Could add a prompt on the Resource Team form asking if person wants to be included as an expert in the speakers/experts bureau.
- e. Initial thoughts on promotion/training strategy for clearinghouse – Did not get to (ran out of time)
- 6. Identify Future Issues Work Group Needs to Address
 - a. PD around noncredit education.

D. Policy, Procedure, and Practice (Theresa)

- 1. Communication and Website for IEPI
 - a. Theresa introduced IEPI’s need for clear communication and branding.
 - b. Tim Leong and Mitch Benson in attendance to support development of communication for IEPI.
- 2. Current Challenges with IEPI Communication
 - a. “Institutional Effectiveness” is not defined.
 - i. We need to communicate the outcomes IEPI hopes to implement within the CCC system.
 - ii. Communicate in a way that is not punitive nor inordinately focused on monitoring and oversight.
 - b. The language surrounding IEPI is highly bureaucratic
 - i. Normal for a brand-new initiative
 - ii. The clarity of the initiative is remains to be seen.
 - iii. We have done outstanding job communicating our initiative to legislative bodies.
 - iv. We bear a policymaker name.
 - (A) “Institutional Effectiveness Partnership Initiative” doesn’t roll of the tongue easily.
 - (B) We committed to a name early because the initiative moved quickly.
 - c. Strategic Communication is an afterthought
 - i. We give communication roles to people who don’t have time to develop thoughtful communication strategies.
 - ii. Lack of definition for terms and jargon

3. Opportunities in Communications for IEPI
 - a. Recommendation given to hire communication consultants
 - b. Consultants will help us provide clearer communication
 - c. Consultants will help us establish a strategic communication plan.
 - i. Learn our audiences:
 - (A) Internal audiences – IEPI, CCCCCO, and Legislative staff
 - (B) External audiences – college personnel, district administrators, and general public
 - ii. Develop appropriate avenues for communicating.
 - (A) Learn our audiences preferences for receiving IEPI communication items
 - (B) Learn to communicate effectively through the preferred avenues of communication.
 - iii. Develop a S.W.O.T. Plan.
 - (A) Strengths
 - (B) Weaknesses
 - (C) Opportunities
 - (D) Threats
 - iv. Strategize Communication Plan for PRT visit.
 - (A) Consult district PIOs in the development of a communication strategy before visits
 - (B) Assign a communications professional to PRTs.
4. Developing a Narrative – Telling IEPI’s Story
 - a. Telling success stories resulting from IEPI efforts – Showcase:
 - i. Successful PRTs visits
 - ii. Successful professional development efforts
 - iii. Successful cross-pollination of best practices between colleges/districts
 - (A) Enrollment management
 - (B) Restructuring courses
 - (C) Creating new pathways and access
 - iv. Students’ success stories resulting from IEPI efforts
 - v. Outcome: we want colleges to re-invite IEPI PRTs and seek PD opportunities
 - b. Missing elements to IEPI Story
 - i. Clarity – Can we clarify the mission and function of IEPI?
 - ii. Value – Can we easily describe the value of the IEPI initiative?
 - c. Humanize IEPI’s efforts
 - i. Focus a story on individuals that were positively impacted by IEPI.
 - ii. The language surrounding “IE indicators” might be too arcane.
 - (A) Indicators are important to our effort, but they can be humanized through storytelling
 - (B) Provide narratives regarding how IE indicators lead to student success.
 - (C) We can’t lose sight of students success as the trajectory of the IEPI effort.
5. Discussion of April Minutes
 - a. Approval of the March IEPI Policy Workgroup minutes
 - b. Discussion of minutes
 - c. Clarification of items in minutes
 - d. Clarification of major topics discussed
6. April’s Meeting topics
 - a. Aligning IEPI Policies with ACCJC
 - i. Potential for future IEPI meetings with ACCJC
 - ii. Recommendation that IEPI work collaboratively with ACCJC with college accreditation training

- iii. ACCJC Trainings and Conferences
 - (A) ACCJC is reticent to offer too much guidance because they don't want recommendations to be interpreted as prescriptive.
 - (B) Can IEPI guide our colleges to meet ACCJC standard?
 - (C) Meeting accreditation standards and becoming reaffirmed is perhaps the highest priority for our colleges, so it is crucial that we seek some kind of partnership.
- b. Developing specific workshop that help colleges meet ACCJC accreditation standards
 - i. Invite college and district administrators with reaffirmed accreditation actions to speak at an IEPI accreditation workshop.
 - ii. Have reaffirmed college walk the audience through best practice used during accreditation evaluation process.
- c. Possible collaboration with PRTs
 - i. Can our PRTs prepare new evaluators for ACCJC evaluation visits?
 - ii. Can we develop PRTs indicator assessment rubrics that align with ACCJC's accreditation evaluation visit rubrics?
- 7. Using strategic communication to support the implementation of policy and best practices
 - a. Recommendation to use communication professionals in IEPI workshops and PRT site visits
 - b. Communications professionals can help communicate best practices in creative and encouraging ways, rather than communicating best practices in an obligatory or punitive manner.
 - c. Use communication professionals to coach PRT members in effective and strategic communication.
 - d. Enrollment management as an example for strategic communication
- 8. Meeting Conclusion
 - a. Recommendation to develop a strategic communication plan in 3 months
 - b. Recommendation of a vendor with a communication consultation firm

III. General Session 2

- A. Christopher Lief shared the good news in the May Revise with respect to community colleges in general and IEPI and professional development in particular.
- B. Barry, Paul, Matthew, and Theresa shared highlights of their respective Workgroup sessions (see above), and responded to a few questions.

IV. Adjournment