

Purpose

This document, which outlines foundational aspects of planning, is designed to serve as a useful reference for institutional research, planning, and effectiveness (IRPE) professionals as they navigate how to lead and support planning efforts at their colleges and districts. Seasoned planning leads may find it helpful to share this document at the outset of a new planning effort to promote common understanding and collective focus on key principles for effective planning. Newer IRPE professionals, often called upon to step into the planning realm for the first time, may find that this document helps demystify planning. In addition, this document enumerates knowledge, skills, and abilities (KSAs) identified as useful in leading and supporting planning—with an emphasis on the bridge from research to planning—to help inform the enhancement of each individual's IRPE toolkit.

What is planning?

Planning is a process and structure for future-oriented decision-making and action, generally articulated in the form of goals and reliant on data to inform the consideration of priorities. In the community college setting, planning includes but is not limited to strategic plans and other college-wide and district-wide plans.

Why do we engage in planning?

We engage in planning to ensure strategic use of resources to advance student equity and success by way of being:

- Student-centered
- Equity-focused and equity-minded



How can we make planning effective?

The following list includes the principles and elements for effective planning (with associated KSAs indicated in parentheses):

1. Collaborative and inclusive
 - Invites and incorporates student voice (*KSA a*)
 - Engages campus community (*KSA b*)
2. Measurable¹
 - Data-informed and evidence-based development (formative) (*KSA c*)
 - Evidence-based evaluation (summative) (*KSA c*)
3. Strategic
 - Forward-looking (*KSA c*)
 - Realistic and actionable (*KSA c*)
4. Integrated
 - Aligned with mission, vision, values (*KSA a*)
 - Connected to actions and resources (*KSA c*)

What KSAs are needed to lead and/or support effective planning?

- KSA a. Context-driven knowledge (i.e., California Community College system mission, local institutional mission, student experience)
- KSA b. Relationship-building skills (i.e., relational skills, facilitation techniques, participatory governance engagement)
- KSA c. Facilitator role abilities (i.e., lead development and discussion of core planning components including implementation and evaluation)

¹ Note that for planning, it is particularly important to incorporate both qualitative and quantitative approaches to data and evidence

How do KSAs for planning relate to research KSAs?

The KSAs below relate to specific aspects of planning, as shown on the prior page. These planning KSAs can build upon the kinds of foundational research KSAs (also shown below) that IRPE professionals bring to our work.

Planning KSAs:	Context-Driven Knowledge	Relationship-Building Skills	Facilitator Role Abilities
	Mission	Relational Skills	Strategic Planning Process
	Student Experience	Facilitation Techniques	
		Participatory Governance Engagement	
Research KSAs:	Content-Driven Knowledge	Technical Skills	Service/Support Role Abilities
	Data Storytelling	Data Governance	Data Dashboards
	Data Visualization	Data Analytics	Data Coaching

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