The Mission of CCCAOE is to provide leadership for occupational education and economic development professionals involved in workforce development and the enhancement of California’s position within a global economy.
You manage a portfolio of courses, programs, partnerships, services, and offerings.

Today we’ll explore tools for improving the performance of that portfolio…

…and management strategies used by other successful programs!

In this module,

- = items in the Resource Handout
- = Strategic Management Moves
When You Complete this Module
You Will be Able to...

- Identify quality indicators that could be used to measure individual programs you manage as part of a portfolio of programs.
- Describe several differences between managing individual programs and managing a portfolio of programs.
- Describe how diversified your portfolio of programs currently is and how you might further diversify it.
Strategic Planning vs. Strategic Management

In your mind, what is the difference between strategic planning and strategic management?

- Effectiveness (doing the right things) is the concern of the strategic planner
- Efficiency (doing things the right/best way) is the concern of the strategic manager

Strategic management activities transform the static strategic plan into a system that enables the plan to evolve and grow as requirements and circumstances change.
Your Portfolio of Programs and Services

- Contract Education
- Work Experience
- Apprentice Programs
- Not-for-credit and Fee-Based Programs
- Short-Term Certificates
- AS-T Degrees
- Credit and Noncredit Programs
- Grants & Collaborative Projects

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The Larger Portfolio

- Regional Collaborations
- Sector Programs and Partnerships
- Your Program(s)
# Regional Partnerships, Programs, & Collaborations

- **Priority Sector Strategies and Programs**
- **Priority Sector Strategies and Programs**
- **Priority Sector Strategies and Programs**
- **Emergent Sector Strategies and Programs**
- **Emergent Sector Strategies and Programs**
Energy Efficiency and Utilities

Sector Strategy

Strategic Framework

- Stackable Credentials
- Pipeline Development
- Employment by Design
- Lab Enhancement
- Curriculum Infusion
- Skills Gap Analysis
- Program Mapping

Industry Requirements

Employment
Creating a Regional Portfolio of Programs

Objective of the Sector Strategy

From Islands Loosely Arrayed

To Close Vertical and Horizontal Coverage

Legend:

- Community College Programs
- HVAC Industry Segments

Feeder Programs

Stacked Credentials

Specialized Programs

Foundation Programs
Managing Your CTE/EWD Program Portfolio
Help for Managing Your Portfolio

A Network of Experts
- Advisory Committees
- Chancellor’s Office Support
- Regional Consortia
- Sector and Deputy Sector Navigators
- Technical Assistance Providers

Tools and Processes
- Quality Improvement
- Program Review
- Program Viability
- Portfolio Management Strategies
It’s a Bit Like Playing Chess…

- You have a set of rules… this is similar to your strategic plan
- Now you must “play the game” and calculate the actual “moves” that will bring the greatest benefit to your program
- Thinking “down-board” is the strategic management technique of being able to predict how each decision or move will affect the program later on
Strategic Management Process:
Quality Improvement
Measuring Quality

- Data used in strategic planning can also be used to measure program value, quality, and success

- **How might you use:**
  - Labor Market/Launchboard information?
  - Student Success Scorecard?
  - Capacity to Serve Students?

- Subjective analysis is also important in quality measurement

- **What subjective information might you use?**
Use Leading Indicators To Measure Quality

The Leading Indicators are designed to align educational programming to labor market needs

- **Alignment of skillsets** within a program to a particular occupation and the needs of the labor market
- **Regionalization of stackable certificates** aligned with an occupation ladder
- **Alignment of a certificate** with state-, industry-, nationally-, and/or employer-recognized certification
- **Creation of a credit certificate from non-credit certificate**
- **Curriculum articulation** along an educational pathway
- **Updating the skills** of faculty, teachers, counselors, and/or ‘supporting staff to student’ to reflect labor market needs
- **Integration of small business** creation and/or exporting modules into for-credit curriculum in other disciplines
Use IHELP Quality Criteria to Measure and Improve Programs

- Program articulates with K-12
- Students are helped to identify and enroll in programs of interest
- Program adapts to changing labor market
- Pathways exist through credential levels
- Students and employers understand skills and competency outcomes of programs
- Credentials offered have market value
- Resources for program are predictable and responsive to workforce priorities

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Strategic Management Move #1 -

Using Quality Indicators to Manage Successful Programs

1. Pair up with a neighbor
2. Consider *either* the CTE or EWD quality standards on your handout for Strategic Management Move #1
3. Identify how you would measure one of the criteria that you see as valuable to your program

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Debrief: How to Measure Quality

<table>
<thead>
<tr>
<th>EWD Quality Indicators</th>
<th>CTE Quality Indicators</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Full-range of services</td>
<td>1. Leadership</td>
</tr>
<tr>
<td>2. Marketing</td>
<td>2. Curriculum and instruction</td>
</tr>
<tr>
<td>3. Customer needs</td>
<td>3. Career exploration</td>
</tr>
<tr>
<td>4. Customer orientation</td>
<td>4. Leadership development</td>
</tr>
<tr>
<td>5. Measure impact</td>
<td>5. Partnerships</td>
</tr>
<tr>
<td>7. Financial performance</td>
<td>7. Organizational design</td>
</tr>
<tr>
<td>8. Human resources</td>
<td>8. Responsiveness</td>
</tr>
<tr>
<td>10. Responsiveness</td>
<td>10. Continuous improvement</td>
</tr>
<tr>
<td>11. Relationship with college</td>
<td>11. Marketing</td>
</tr>
<tr>
<td>12. Leadership</td>
<td></td>
</tr>
</tbody>
</table>
Hiring and Keeping Quality CTE Faculty

- Special challenges when hiring CTE Faculty
  - Full-time faculty are often able to earn more by working in their field of expertise (especially in fields like nursing)
  - Part-time faculty usually have full-time jobs elsewhere that absorb most of their time and energy
  - High turnover among part-timers

- What other challenges have you experienced with finding and keeping quality faculty?
Strong Workforce = Strong CTE Faculty

Rec # 13- Increase the pool of qualified CTE instructors by addressing recruitment and hiring practices

- Clarify barriers
- Disseminate effective practices
- Develop recruitment pipelines
- Mentorship model

Rec # 16- Explore solutions to attract industry professionals in high-salaried occupations to become CTE faculty in community colleges

- Create and share models and best practices to address the salary differential needs in high-pay fields
- Encourage partnership with industry and the local community to support salary differential needs.
Minimum Qualifications
For Faculty

- Districts must adhere to the minimum qualifications, though they may add criteria.
- The Academic Senate maintains a Discipline list which is reconsidered/every 3 years.
- Some technical, trade, or industrial fields (150 have been identified) specify BA degrees + 2 years experience, rather than masters degrees.

Strong workforce Rec #14 = Consider options for meeting minimum qualifications to better integrate industry professionals who possess significant experience into CTE instructional programs.
Improving CTE Faculty

Do you use Perkins funds to....

- Provide training in instructional methodology?
- Encourage and support wide use of instructional techniques beyond lecture?
- Encourage and insist on faculty being well prepared for class?
- Support professional development of all faculty, include part-timers?
Strong Workforce Professional Development Rec # 15

Enhance professional development opportunities for CTE faculty to maintain industry and program relevance

a. Provide all faculty with training in teaching methods and strategies, including the use of technology

b. Identify and address structural barriers that prevent faculty participation in professional development and create incentives that address reassigned time, externships and other methods of skill upgrades

c. Provide professional development for counselors in the use of career and educational planning tools

d. Increase opportunities for CTE faculty to participate in professional development such as sabbaticals, industry events and training
Quality Presenters for Not-for-Credit and Fee-Based Programs

- College faculty can be excellent presenters and trainers for Contract Training or Not-for-Credit programs.
- Presenters from outside the college may be held to the same standards or required to hold credentials or expertise in the areas they are training.
- Qualified subject-matter experts may know their occupation but not be effective trainers.
- Program evaluations can help weed out ineffective presenters.
Strategic Management Process:
Program Review
Program Review: Opportunity or Obstacle?

Chancellor’s Office & ED require a review every 2 years

- Continue to meet a documented labor market demand
- No unnecessary duplication
- Effectiveness measured by employment and completion

Accreditation Requirement
An on-going systematic review of program effectiveness

- Relevance / Appropriateness
- Achievement of learning outcomes
- Currency
- Future needs and plans of programs
What is a Program?

“An organized sequence of courses leading to a defined objective, a degree, a certificate, a diploma, a license, or transfer to another institution of higher education.”

**CCCO definition**

Example:

Consumnes River’s definition, “A program is a cohesive group of courses or activities that support a common set of outcomes.”

Each college creates its own definition of a program to be used in its planning and program review.
Required Program Review
Components

**STUDENT ACHIEVEMENT DATA***
- Course completion
- Retention term to term
- Progression to the next course
- Program, degree, and certificate completion
- Transfer rates
- Score on required licensure exams

**STUDENT LEARNING DATA**
- Based on SLOs, is determined locally

There is no standard model for program review. Often it’s a self-study driven by program faculty.

*LaunchBoard and the Student Success Scorecard provide some of this data*

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Program Review

Section 1
Description
Who are you? How is your program aligned and defined in the College?

Section 2
Expectations
What are your planned performance expectations (SLOs)?

Section 3
Performance
What was your actual operating performance?

Section 4
Analysis
What are the differences between what you expected to do and what you did?

Gap Analysis

Section 5
Findings
What are some major conclusions derived from your analysis?

Section 6
Initiatives
Based on your findings, what actions should you take to improve?

Section 7
Process Assessment
Have any of your initiatives been implemented? How can this program review process be improved?
Possible Program Review Results

- Expanded
- Enhanced
- Linked
- Reduced
- Maintained
- Additional Study
New Program Review Tools

LaunchBoard Program Snapshot
- Visuals display information about supply and demand, program completion, and employment outcomes
- A “wizard” will allow users to select data for display
- Benchmarking data will be provided for top 10 colleges in the state

COE Supply & Demand Data
- Projected occupational demand filtered by region, county, occupation and more
- Expected supply of program graduates by community college and other post-secondary by TOP code
- Available by password
Choose Your Data

- Number of students vs. available jobs
- Student success and completion
- Students receiving third party credentials
- Are students getting jobs?
- Are students making reasonable wages?
- Student satisfaction with programs
Sample Data Graphic

Comparison of Completers and Available Jobs
Strategic Management Move: #2

Using New Tools for Program Review

- With a partner, review the data that will be available in the new LaunchBoard Program Review tool.
- Decide which data would be most valuable during a program review.
- If you are not involved in program review, look for data that would be valuable to you in managing the program(s) you oversee.
Strategic Management Processes: Program Vitality, Viability, Suspension and/or Discontinuance
No Matter What You Call It…

- Vitality, viability, suspension, or discontinuance studies are all in addition to program review
- Often they follow the program review, falling enrollments, or faculty retirements
- These are usually NOT self-studies and sometimes do not even include program faculty as part of the study team
- Possible results
  - Suspension of program
  - Reorganization
  - Initiation of a new program
  - Initiation of new direction
  - Modification
  - Improvement
Strategic Management Move #3

Proactive Reasons for Program Reviews

From the list of reasons on your Handout Page 9, be ready to discuss which reasons could be considered proactive...and why!

- Reactive reasons respond to problems that need fixing
- Proactive reasons look for future opportunities or solve problems before they occur
Program Suspension Considerations

- Students and student success; including those students who are in progress on the program
- The comprehensiveness and balance of the portfolio of offerings across the college curriculum and within the district
- The educational and budget-planning process
- The regional workforce and portfolio of offerings
- Transfer to four-year colleges and universities
- Local businesses and industries and their needs
- Faculty and staff
Discontinued Programs

- About 30% of colleges surveyed* in 2011 had discontinued a program in the past three years
- 76% indicated that they had significantly reduced programs in the last three years, most by reducing course offerings
- Half reported reducing faculty

*2011 Survey done by Academic Senate
Viability Tool Kit at Doing What Matters

Academic Senate Perspective, Policies, and Procedures for Program Viability

- Program Development, Reduction, and Review: Faculty Take the Lead (PowerPoint)
- Program Discontinuance Sample Procedures
  - Cabrillo
  - Chaffey
  - Desert CDD
  - Foothill, Glendale, Hartnell, Modesto, Santa Ana, Santa Rosa and Santiago Canyon
  - Palomar
  - Riverside
- 2010 Putting Students First: The Solution to the Challenge of Program Discontinuance
- 2009 Enrollment Management Revisited
- Spring 1998 Program Discontinuance: A Faculty Perspective

Program Viability Samples

California Community College Deans – Program Viability Resource
- Program Viability Contact List

Community Colleges Suggestions
- Program Viability Mini-Review
Strategic Management Process: Strategies for Portfolio Management
Programs vs. Portfolios

- Most measurements tell us how individual programs are doing.
- A portfolio measurement tells us how a college’s, district’s, or region’s programs (and services) are working together to meet workforce needs and demands.
- In a balanced portfolio, programs may display different strengths (and weaknesses) but together they function well in supporting workforce needs.

Is it possible to have successful programs but still not offer the “right” programs for your area/region?
Possible Portfolio Management Strategies

- Market Demand
- Program Performance
- Economic Impact (Wage Gain)
- Skills Gap/Match
- *Diversification!*
Regional Market-Demand Strategy

- How many jobs are available regionally? (demand)
- How many other training programs exist? (supply)
- What are my programs’ impacts on the pool of available programs?
- Are there opportunities for growth?
- How might the market demand affect my program(s)?
## Partial View of Regional Market Demand

<table>
<thead>
<tr>
<th>TOP Code</th>
<th>TOP Title</th>
<th>Average Annual Openings</th>
<th>Average Annual Completers</th>
<th>Average Annual FCC Completers</th>
<th>Total Gap or Surplus</th>
<th>Median Hourly Wage</th>
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<tr>
<td>1402</td>
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</table>

*Source: EMSI Gap Analysis Model*
Student-Performance Strategy

- How many students are starting?
- How many are completing?
- How does my program compare with others in my region? (completion, duration, wage gain)
- Diversity and Access?
- Performance of pipeline from high schools?
- Performance of transfer pathways?
- Career readiness of completers?
Economic-Impact Strategy

- What is the economic impact of our portfolio of programs on the local economy?
- How much did students make prior to starting?
- How much did they make immediately after leaving? 2 years after? 5 years after?
- Are they making family-supporting wages?
- What additional skills do they need that would greatly influence their wage gain in their specific industry?
Skillset-Gap Strategy

- What skills and competencies are required industry-wide? (Technical skills, soft skills, work skills)
- Are students being trained to those skills?
- Are there third-party certifications that are available?
- Are new courses and/or programs needed to address skills requested by business and industry?
Diversification Strategy

- Do potential students have choices among program types that meet their needs or are for-credit programs all you offer?
- *Diversify your format…work with the “other side of the house” (CTE or EWD) to develop complementary programs*
### Summary of Program Diversification Options

<table>
<thead>
<tr>
<th>Apportionment (Classes open to everyone)</th>
<th>Contract Ed, Grants, Fees (Paid by participant or others)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Credit Classes</td>
<td>Credit Classes &amp; For-Credit Apprenticeship Programs (If contract ed, not open to public)</td>
</tr>
<tr>
<td>Noncredit classes</td>
<td>Noncredit classes &amp; Noncredit Apprenticeship Programs (Contract Ed, RSI, or grant-supported)</td>
</tr>
<tr>
<td>Noncredit with enhanced apportionment (Funded at same level as credit classes)</td>
<td>Not-for-Credit and/or Fee-Based</td>
</tr>
<tr>
<td>• Short-Term Vocational with High Employment Potential</td>
<td>• Not eligible for apportionment.</td>
</tr>
<tr>
<td>• Basic Skills</td>
<td>• Supported with fees or grants,</td>
</tr>
<tr>
<td>• Workforce Basic Skills</td>
<td>• Meet different standards</td>
</tr>
<tr>
<td>• English as a Second Language</td>
<td>• Are flexible in length, location, timing, and trainer qualifications</td>
</tr>
</tbody>
</table>

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[Link to Case Study](#)
Diversified Apportionment-Based Formats

- Certificates of Achievement
- AA, AS, AA-T, AS-T Degrees
- Shorter for-credit Certificates
- Noncredit and/or Adult Education
  - Career Development and College Preparation (CDCP) programs lead to Certificates of Completion/Competency and enhanced or full (‘15-’16) apportionment
    - Short term vocational CTE programs with high employment potential
    - Workforce Basic Skills Preparation
    - English as a Second Language and Vocational English as a Second Language
Other CTE Diversification Options

- **Collaborative programs (formerly conjoint programs)**
  - Offered by 2 or more colleges
  - Each college can award certificates and/or degrees

- **Work Experience Education and Internships**
  - Can be general or occupational
  - Supervised by a qualified instructor or coordinator
  - Students earn up to 16 units

- **Apprenticeship Programs**
  - Credit or noncredit
  - Employer serves as program sponsor
EWD Diversification Options: Contract Education

- In the Funding CTE & EWD module, you’ll learn more about Contract Education
- Three types of contract education:
  - Contracts with Business and Industry
  - Contracts with Public Entities
  - Contracts Supported by Public Training Funds
- Contract education can be apportionment-generating or supported completely by contract income
  - How might contract education help diversify your program portfolio?
EWD Diversification Options: Fee-Based Programs

- Often these are not-for-credit
- May be offered through community services or contracts with businesses
- Although these programs (and contract education) do not require state Chancellor’s Office approval, they require local approvals as determined by your Board of Trustees
Using Portfolio Management
Strategic Management Move #4

Developing Tools for Measuring Portfolio Performance

- We know how to measure quality and effectiveness of individual programs, but how can portfolio performance be measured?
- In a group of 4 people, consider the Portfolio Measurement Tool on page 10 of the handout
- Discuss and evaluate the criteria suggested for measuring relative value of specific programs to the portfolio. Suggest others of your own!
Use Your Resources Strategically

In your Take Home Handout:
- Resources for all of the tools discussed in this module
- Slides from this module that have important graphics on them
Now, Can You...

- Identify quality indicators that could be used to measure individual programs you manage as part of a portfolio of programs?
- Describe differences between managing individual programs and managing a portfolio of programs?
- Describe how diversified your portfolio of programs currently is and how you might further diversify it?
Now How Well are You Able to...

- Identify quality indicators that could be used to measure individual programs you manage as part of a portfolio of programs
- Describe several differences between managing individual programs and managing a portfolio of programs
- Describe how diversified your portfolio of programs currently is and how you might further diversify it
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Navigating CTE & EWD
Career Pathways
EWD Essentials
Strategic Planning
Program Development and Approval
Connecting with Businesses and the Workforce
Strategic Portfolio Management
Funding CTE and EWD
Managing Perkins
Enrollment Management
Laws, Regulations, and Policies
Leadership