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Introduction

OCCC’s FY 2009 Annual Plan contains both familiar and new elements.

The Board’s Planning Directive, including the College’s statements of purpose—mission, vision, operating values, and ENDs—was revised extensively by the Board last year and remains the same. Similarly, the College’s ten-year strategic plan, *The Way Forward and Why it Matters*, continues to provide guideposts for achieving institutional success in the years ahead.

Many of the measurements used in this year’s plan will be familiar, too. Specific annual plan measures and targets for monitoring the College’s progress in achieving the Board’s access, student preparation, student success, graduate success, and community development ENDs are listed. Many of these outcomes, such as enrollment, developmental course completion, retention rates, and community participation indicators, are the same as in previous years.

The most significant changes involve the design of our measurement framework—especially our continuing effort to more closely align the College’s ENDs with our annual plan measurements and to create “a culture of evidence” that uses widely available and timely information to make steady improvements on the accomplishment of the mission.

We have also added several new student success measurements to the plan that reflect OCCC’s participation in the national and state *Achieving the Dream* initiative.

We are proud of our accomplishments in FY 2008, but the FY 2009 plan reflects our continuing belief that it is essential to create opportunities for more Oklahomans to go to college and to succeed once they are in college.
FY 2009
OCCC Annual Planning Process & Timeline

**NOVEMBER**

1. President’s Cabinet Planning Retreat and review of Annual Plan draft

**NOVEMBER - JANUARY**

2. Departments develop initiatives to respond to draft Annual Plan

**FEBRUARY**

3. Board of Regents reviews draft Annual Plan

**FEBRUARY - MARCH**

4. President’s Cabinet reviews and assigns priorities to initiatives

**APRIL**

5. Board of Regents reviews and approves Annual Plan including budget principles

**APRIL – MAY**

6. President & President’s Cabinet prepare draft FY 2009 Staffing Plan and all Budgets

**MAY**

7. Board of Regents reviews Staffing Plan, Tuition Plan, and Budgets

**JUNE**

8. Board of Regents approves Staffing Plan, Tuition Plan, and Budgets

**FY 2009**

9. President’s Cabinet/Departments implement Plans and monitor progress
Planning Directive and Statements of Purpose

The College’s Mission, Values, Vision, and ENDs are the compelling statements of purpose that direct planning and budget development at the College. These statements are the basis for the FY 2009 Planning Directive.

**What We Do…Our Mission**

OCCC provides the people of Oklahoma and our community with broad access to certificates of mastery, associate degrees, community education, and cultural programs of exceptional quality, empowering our students to achieve their educational goals and our community to thrive in an increasingly global society.

**Where We Aspire to Be…Our Vision**

OCCC aspires to be one of the most significant community colleges in the nation – known for the amazing success of our students and for our prominent role in creating our community’s future.

**How We Operate Day-to-Day…Our Values**

OCCC strives to achieve its mission and ENDs and fulfill its vision by operating in a culture that is committed to the following:

- Innovation: Creative and forward-thinking
- Integrity: Honest, ethical, and respectful to all
- Diversity: Embrace and appreciate the value of differences
- Stewardship: Wise and efficient use of resources
- Accountability: Data-driven evidence of mission accomplishment

**What We Want to Achieve…Our ENDs**

1. Access: Our community has broad and equitable access to a valuable college education.
2. Student Preparation: Our students are prepared to succeed in college.
3. Student Success: Our students achieve their individual educational aspirations.
4. Graduate Success: Our graduates succeed at four–year institutions and/or in their careers.
5. Community Development: Our community is enriched economically and socially by our educational and cultural programs.
The Way Forward and Why It Matters

The *Way Forward and Why It Matters* is the College’s ten-year strategic plan. Adopted by the OCCC Board of Regents in 2007, the ten Way Forward initiatives focus on expanding the College’s presence in our traditional, virtual, and international communities and moving the College beyond its traditional access mission to achieving significantly higher rates of student success. They include:

- Achieving the Dream Initiative
- Technology and Personalized Service Initiative
- OCCC Online and Off-Campus Initiative
- The OCCC Institute for Global Excellence Initiative
- Developing Our Next Generation of Leaders Initiative
- New Learning Spaces Initiative
- Capitol Hill Center Initiative
- Childcare for Students Initiative
- Center for the Arts–Phase II - Theater
- Campus Facilities

Preparatory work on several of these initiatives has already begun and is reflected in the FY 2009 Annual Plan. As the projects develop, milestones for their achievement will be incorporated in subsequent annual plans. Annual reports will be provided on the progress related to the ten (10) initiatives.
A Culture of Evidence

For the last several years, the OCCC Annual Plan has used strategies to link the Board’s ENDS with our annual plan measurements and targets. For FY 2009, we have revised the terminology to clarify “the line of sight” between the College’s strategic ENDS and the indicators we use to measure our progress on an annual, semester, and even daily basis.

This approach has two levels:

- The ENDS statements which set out the Board’s expectations for student success and community involvement. In addition to these statements, we have added another category, Mission Capacity, to capture those activities done to ensure the College has the resources—financial, physical, and human—to achieve the ENDS.
- Core Indicators with specific measurements provide information on our progress in achieving each END.

Moving forward, we intend to use a revised framework to provide more timely feedback on Annual Plan measures. Performance on measures will be shown as: Above Target (blue), On Target (green), Slightly Below Target (yellow), and Below Target (red). It is hoped that this will improve decision making at all levels in the organization and provide the Board of Regents with a more cohesive and succinct indication of achievement of the ENDS.
ENDs and Mission Capacity Outcomes
Related Core Indicators of Accomplishment and the
Specific Measurements for FY 2009

ACCESS

Core Indicator #1: Enrollment market share – Equal to or increase over prior years
Core Indicator #2: Enrollment – Equal to or increase over prior years
Core Indicator #3: Race/ethnicity of student population—Equal to or within 5% of area population

STUDENT PREPARATION

Core Indicator #4: Concurrent enrollment of high school students—Equal to or increase participation over prior years
Core Indicator #5: Successful completion rates in developmental courses – Increase over prior years
Core Indicator #6: Successful completion rates in gateway courses (first semester)—Increase over prior years

STUDENT SUCCESS

Core Indicator #7: Successful completion rates in all college-level courses—Increase over prior years
Core Indicator #8: Persistence and retention rates—Increase over prior years
Core Indicator #9: Student goal attainment rates – Increase over prior years (includes degree completion)

GRADUATE SUCCESS

Core Indicator #10: Health professions first-time licensure pass rates – At or above national averages
Core Indicator #11: Graduates satisfaction rates with preparation for employment or transfer—At or above 85%
Core Indicator #12: Employer satisfaction rates with graduates – At or above 85% satisfaction
Core Indicator #13: Transfer students grade point average – At or above “native” students

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COMMUNITY DEVELOPMENT

Core Indicator #14: Successful season of cultural/arts programming—Number of programs, number of attendees, and quality of programming offered by Arts Festival Oklahoma, the Cultural Arts Series, other college-sponsored art exhibitions, and vocal, instrumental, and theatrical performances

Core Indicator #15: Enrollment in community education and business development programs—Increase over prior years in the number of non-credit and credit courses and enrollment in these courses offered through Community Education, Corporate Learning, and the Capitol Hill Center

Core Indicator #16: Value-added impact of community outreach and community service activities—Number of events, programs, initiatives, number of participants and/or people impacted, and quality of the outreach/service offered by Community Development

MISSION CAPACITY

Core Indicator #17: Financial stewardship—unqualified annual audit on prior year financial statements and a satisfactory or higher rating on the financial “Perfometer”

Core Indicator #18: Employee development—Increase overall participation, implement revised leadership program, provide the equivalent of 500 hours training related to emergency preparedness

Core Indicator #19: Facilities development—Dedicate and occupy the new Health Professions Center and Center for the Arts, finalize the 2020 Campus Master Plan document, finalize long-term plans for the Capitol Hill Center, accept and utilize a potential donation of an elementary school building

Core Indicator #20: Resources development—Successful campaigns to raise funds for the Performing Arts Theater and the Capitol Hill Center
Other Significant Considerations for FY 2009

Priorities

In addition to anticipated mandatory cost increases (contractual, utilities, insurance, and scheduled increase in employer contribution to OTRS), priority will be given to the following:

Implementation of *Achieving the Dream* strategies designed to improve student success (successful completion of courses, persistence to the next semester, and retention through graduation). These strategies are currently being developed by the *Achieving the Dream* Leadership Team.

Consideration of significantly increasing the opportunities for student employment by the College.

Increased participation and support for the OKC Go! Program.

The two buildings under construction will be operational early in the FY 2009 year, adding utility and other costs. Also, the possible gift of the John Glenn Elementary School and the acquisition of a facility for the OCCC Capitol Hill Center in FY 2009 will add utility and operational costs.
FY 2009 Budget Development Principles

This section of the FY 2009 Annual Plan outlines the budget development planning for FY 2009 including the budget principles.

Budget Principles

Budget principles serve as guidelines during budget development and provide direction to take the first steps to begin the journey from success to greater significance as outlined in *The Way Forward and Why It Matters* and to achieve the FY 2009 ENDs and mission capacity outcomes and related core indicators of accomplishment and the specific measurements.

The budget principles for FY 2009 are as follows:

- Maintain flexibility to respond to student and community needs and opportunities.
- Reflect the values of the College.
- Ensure operational efficiency.
- Maintain competitive salaries and reward employee performance within budget capability.
- Improve and maintain the physical plant.

FY 2009 Budget Development Summary

Revenue and expenditure plans will ensure that progress continues toward meeting the ENDs and mission capacity outcomes and related core indicators of accomplishment and the specific measurements. The plans will address capital projects, technology, community outreach and the operations and human resource needs necessary for continued success and to achieve the FY 2009 plan.
Revenue Assumptions and Estimates (in comparison to FY 2008)

- It is anticipated that state allocations will remain relatively flat. The College experienced budget cuts beginning in FY 2002. Our state allocations were restored to our FY 2002 levels in FY 2006. The FY 2007 state allocations reflected a significant increase due to a large base equity adjustment. The state allocations for FY 2009 are roughly estimated to be $26.6 million.

- It is anticipated we will increase tuition and fees per credit hour approximately seven-to-eight percent. The increase will remain at approximately 30% below the limits established by the Oklahoma State Regents for Higher Education (OSRHE), a percentage maintained by the college for a number of years.
  - An increase of $6 per credit hour in tuition.
  - The revenue from the Facility Use Fee increase of $3 in FY 2008 will be budgeted in a contingency for use for the theater project. This will bring the total contingency saved for the theater to $1,225,335.
  - The average OCCC student enrolls in 8 credit hours per semester. A 7.69% increase will result in the average student paying $48 more in tuition and mandatory fees per semester.

- It is anticipated that the South Oklahoma City Area School District revenue will increase slightly. Additionally funds accumulated in prior years are available.

- Revenue from private sources (primarily from grants and donations) will increase moderately.

- We estimate our FY 2009 Education and General revenue to be approximately $49 million and our Auxiliary revenue to be approximately $9 million.
Expenditure Assumptions and Estimates (in comparison to FY 2008)

- Non-personnel budgets will increase to primarily fund costs related to the success of the Key Outcomes, Process Measurements and Milestones, and mandatory costs. Current estimates for necessary non-personnel mandatory cost increases are approximately $1,050,000, which includes utilities and contract obligations.

- Total personnel costs are anticipated to increase in order to fund the following:
  - To maintain current benefits, the cost will increase $635,000;
  - Salary increases based on performance are anticipated to be between 1% and 3%, contingent on budget availability. Salary increases in this range would cost between $750,000 and $900,000;
  - Adding faculty and staff positions to accomplish the objectives outlined in the FY 2009 Annual Plan will be contingent on budget capability.

- Total FY 2009 Educational and General expenditures are estimated to be $49 million and our total Auxiliary expenditures are estimated to be $9 million.