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## Integrated Planning Template

This section is organized by the questions identified on the Integrated Planning report.

### Question 1a:

Do we need to list all of our goals from all three plans? That could be over 100 goals.

Yes.

What if there are similar goals that cross all three programs?

You can consolidate similar goals into one.

In reflecting on our previous goals, we discovered many of our "goals" are actually activities. Do we still need to list them as goals?

No.

How detailed do we need to be in explaining our progress?

A certain amount of detail may be necessary; however, it is preferable for you to be concise as well as complete. Some questions may be answered more succinctly; for instance, if you are on track for a particular goal, you may simply state, "on track."

### Question 1c:

What if I don't have any previous goals that intersect all three programs?

You probably have goals that intersect since all three programs provide services to similar populations. We suggest you talk with your program counterparts to determine the crossover.

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### Question 3:

#### Do we only need to come up with five goals?

You will likely have more, but we only require you to list five. Other questions in the plan refer to your student success goals, which may include these five and any others you establish.

#### What do you mean by "goals"?

In general:

- Goals focus on the general aims of the program
- Objectives focus on what you expect to do/know at the end of the activity
- Outcomes focus on what actually happened and for which you have supporting evidence

Goals are typically more general, objectives and outcomes more specific. In addition, objectives look toward the future and outcomes reflect the current state.

### Question 4:

#### What are "student equity-related categorical programs? What are campus-based programs?

The "Student Equity Planning Overview 2015-16" from the Chancellor's Office lists the following categorical, campus-based programs

- Disabled Student Programs and Services (DSPS)
- Extended Opportunity Programs and services (EOPS) and Special Services
- Math, Engineering, Science Achievement (MESA)
- Puente
- Middle College High School Programs
- Student Success and Support Program (SSSP)
- Programs for Foster Youth
- Programs for Veterans
- California Work Opportunity and Responsibility to Kids (CalWORKs)
- Student Financial Aid Administration (SFAA)
- Board Financial Assistance Program (BFAP)
- Basic Skills Initiative

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### Question 5:

If the only noncredit offering we have is supervised tutoring, do we still need to answer this question?

Yes

### Question 6:

Do you mean just in house PD, or does this refer to PD off-site?

Please include all professional development activities, e.g., flex, statewide events, etc.

Do you mean just the five goals listed in #3?

Be sure to list all of your goals, not just the five goals in #3.

### Question 7:

Do you mean just the five goals listed in #3?

Be sure to list all of your goals, not just the five goals in #3.

### Question 8:

Do you mean just the five goals listed in #3?

Be sure to list all of your goals, not just the five goals in #3.

### Question 9:

Do you mean just the five goals listed in #3?

Be sure to list all of your goals, not just the five goals in #3.

### Question 10:

Where do I send my Executive Summary?

You do not need to send the Executive Summary to the Chancellor's Office. Simply post it on your college website and include a link to that posting in the report.

Do you want the Executive Summary to include goals for BSI and SSSP?

The decision is up to the college. You can include all program goals, or just the minimum requirement, which is Student Equity goals.



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## Approval Signatures

Does each college submit a plan or does each district?

Each college submits a plan.

In multi-college districts, are you looking for the campus president or the district chancellor?

The college president must sign the plan.

## Budget Template

Where are the signatures for approval of the budget?

There is no separate signature page for the budget. The signatures for the plan are all that is required.

Do we need to break down the expenditures in detail for each category?

No.

Will the Year-End Expenditure Report (YER) break down the expenditures in detail for each category?

At this point, the structure of the YER has not been determined

Will SE still be reporting budget expenditures by category and activity within budget code line items?

No.

## Expenditures Guidelines

Do we need approval for out-of-state travel?

No, but the travel must be related to SSSP, SE, or BSI. (In addition, please review AB 1887 related to state funded travel to states with discriminatory laws.)

Are gift cards a "gift of public funds"?

Not necessarily, though the word "gift" is included in the phrase "gift card," it does not automatically mean it is a gift of public funds. Instead, you need to consider the objectives of the program and whether the gift card helps achieve the objectives of the program while also being reasonable and justifiable.



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Have we informed auditors of the change to expenditure guidelines?

Yes. They will know by the time they audit these expenditures since that audit will be after the funds can be spent (i.e., for 2016-17 funds, after June 30, 2018).

Can I spend BSI (SSSP/SE) funds on \_\_\_\_?

The Chancellor's Office is not making this determination for colleges. Instead, each college needs to decide whether the expenditure is reasonable and justifiable based on program objectives, as outlined in Ed. Code and title 5.

Can you pay for courses (i.e. instructor costs) if we opt to not collect apportionment for the course?

Yes.

So can you request more funds?

You will be able to request more funds in the Mid-Year Expenditure process. At this time, we are not asking for Mid-Year reports for 2016-17 (possibly in the fall of 2017) since we are allowing two years to expend 2016-17 funds. We are not expecting colleges to return as much funds (due to the extended time to expend) in this new cycle.

Will any leftover Student Equity 2015-2016 funds be rolled over, or will these funds go back to the state?

Funds are not "rolled over." 2015-16 Student Equity funds delivered to colleges in the apportionment process, but not expended will need to be returned to the state. The college will receive an invoice for the repayment of those funds.

Are we allowed to pay students a stipend for a performance or presentation for a program?

No. Stipends for students are one of the five non-allowable expenditures listed in the new Expenditure Guidelines.

What about Basic Aid districts? Do those count towards apportionment?

Basic aid districts are allocated categorical funds in the same manner as other districts.

BSI - Can we now use funds in transfer level courses (accelerated Math/ English) that we believe serves the success of students previously placed in Basic Skills?

The current Basic Skills Initiative (BSI 1.0) limits BSI fund expenditures to the following purpose:

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Enhancements to basic skills and immigrant education programs, including, but not limited to, curriculum development, course articulation, research, professional development, instructional equipment, counseling, and tutoring.

However, note that the Chancellor's Office clarified that these funds were limited to basic skills courses and students in basic skills courses, with the exception of Intermediate Algebra.

BSI 2.0, effective July 1, 2017, expands the allowable expenditures. It provides for the above purpose as well as:

To implement or expand upon the use or application of evidence-based practices and principles identified in paragraphs (1) to (6), inclusive, of subdivision (a) of Section 88810. [CA Ed Code 88815(b)(2)(B)(ii)]

Section 88810 lays out the Basic Skills Student Outcomes and Transformation program. One of the evidence-based practices and principles from the Transformation program is "increasing the placement of students directly in transferable gateway English and mathematics courses and career pathways, with remedial instruction integrated as appropriate for underprepared students." Another is "providing proactive student support services that are integrated with the instruction."

Therefore, if you want to support students placed into transfer-level English, math, or ESL who would have been placed into basic skills courses, such support is clearly within the allowable expenditures for BSI 2.0 funds (BSI funds July 1, 2017 and after). However, BSI funds allocated prior to July 1, 2017 do not have an explicit allowance for such an expenditure and have been further limited to basic skills courses and the students enrolled in them (again, with the exception of Intermediate Algebra).

**If 2016-2017 SSSP funds are "carried over", can we use 2017-2018 expenditures for SSSP match?**  
SSSP 2016-17 funds are not "carried over" into the next fiscal year. Each fiscal year has its own allocation. The college has two years to spend that yearly allocation. The Chancellor's Office has been allowing an additional six months (for Student Equity and SSSP) and is simply extending that ability to two years, instead of 18 months.

First, matching funds are only required for SSSP funds. Matching funds must be a 1:1 ratio for each year's allocation. If 2017-18 expenditures are used for 2016-17 match funds, they cannot be

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duplicated as matching funds for 2017-18. Colleges will need to track funds expended to each fiscal year separately.

**For clarification, will be an annual program allocation with two years to spend?**

Yes. There will still be annual allocations for each program, with two years to spend the yearly allocation.

**Since the plan is not due until Dec. 2017, are we using 2016-17 funds to pay for costs incurred fall 2017? What would be the start date for 2017-19 funds? July 1, 2017?**

You are allowed to pay for expenditures incurred in the 2017-18 fiscal years with 2016-17 funds, but program or accounting will need keep track of funds expended from 2016-17 and 2017-18 funds, respectively. Funds expended in one fiscal year cannot be used an expenditure in another one. July 2017 will be the start date for the expenditure of the 2017-18 program allocation.

**Will SEP/SSSP/BSI have "regular annual allocations" in July 2017 for 2017-18 or will it be received "bi-annually?"**

Each program will continue to receive their yearly program allocations in July.

**What happens if an employee previously paid by general fund has a change in role or an additional role? Would this be considered supplanting?**

This would be a very delicate situation. Initially, any position paid for by general fund, then paid for by BSI, SE, or SSSP would be considered supplanting. So simply changing a job description would not suffice. If new duties were created by BSI, SE, or SSSP, then a portion of that position could be paid by the respective program. If the position is new due to the requirements created by BSI, SE, or SSSP, then the position can be paid by that specific program. For clarity, a position must have net new responsibilities directly related to BSI, SE, or SSSP services for it to be considered allowable.

**Is the funding for the three grants are lumped together just for reporting purposes?**

The funding for the three programs: BSI, SE, and SSSP are through the apportionment process and are not grants. The report for all three programs has been integrated into a single report to minimize work for the colleges and to recognize the natural integration of the programs at the campus level. The Chancellor's Office encourages colleges to leverage all funds to meet the needs of their campus population.



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### What is the definition of "Public Purpose?"

A "public purpose" is a governmental action or direction that purports to benefit the public as a whole. The basic legal framework prohibiting a gift of public funds is found in the California State Constitution. Article XVI, Section 6 of the California Constitution generally prohibits the giving or lending of public funds to any person or entity, public or private, subject to certain exceptions.

### Noncredit

Would the integration of SSSP include credit and noncredit into one plan?

Yes.

What will be the noncredit certification process if a college were to opt out?

The college would not submit the yearly certification form in June. If the decision to opt out is made after the certification form is submitted, then the college should inform the Chancellor's Office of the change. The email is [noncreditSSSP@cccco.edu](mailto:noncreditSSSP@cccco.edu).

Is it an option to provide SSSP services to noncredit students with credit funding if your "program" is small?

Yes, colleges can certainly use credit SSSP funding to provide noncredit students with services.

### Other

What reports are due annually?

It has not been determined at this time.

Will there be a Mid-Year Expenditure Report?

It has not been determined at this time.

It appears the new report only has budget line items for Personnel, Benefits and Non-Personnel for SSSP/SEP/BSI. Will the accounting for three programs continue to be separate?

Yes.

Is there some guide to BSI/SE/SSSP collaboration w/Career Pathways/Strong Workforce?

Not at this time. The Chancellor's Office understands that BSI, SE, and SSSP goals intersect with other programs and is working on their integration in future phases.