



Annual Planning Information Session

*What you need to know to increase
the likelihood of a successful submission**

August 31, 2026

Planning Committee Co-Chairs
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Outline of Presentation:

- Highlight of Changes to Be Implemented This Cycle
- Why Plan?
- Orientation to Planning & Budget Development Webpage
- Inspiring Innovation: Recent Submissions & Possible Sources of Innovative Ideas/Solutions
- Tools to Help Expand on the Initial Idea & Engage Others
- Effective Planning Practices – Sequential Steps
- Reminders
- Questions?



Highlight of Changes to Be Implemented This Cycle (Overview)

Changes Regarding	Refinements for 2027-2028 Annual Planning Process	Rationale
Planning Committee (PC) Role	Assuming responsibility for reviewing and managing Operational Optimization (OO) submissions (along with Strategic Initiative (SI) submissions)	Both types of submissions link to EMP (area of PC expertise)
	Categorizing submissions as SI or OO	Remove onus from submitters (PC most familiar with distinctions; additional materials for PC to be developed fall 2026)
Increased Coordination	<u>Between PC and Cabinet:</u> - Initial Review of SI & OO Proposals - Updates on Status of Proposals <u>Between IT and Submitters:</u> - Via IT Project Intake Form*	- Continues improvements implemented spring 2026 - Alignment with recent changes - Increased collaboration with experts
Timeline (Earlier Deadline)	SI & OO Submissions due by October 30, 2026	- Assessment of submissions completed by end of January - All resource requests associated with SI/OO submissions get forwarded to District committees at same time as Operational Continuation needs



Why Plan?

- Innovation helps promote student success, improve the student experience, and increase effectiveness
- Intentional planning around institutional priorities aligns with accreditation expectations
 - institutional priorities → drive planning → resource allocation
- Encourage innovation and collect ideas through the annual planning process
 - inform the development of grant proposals (to identify alternative funding options)
 - position NVC for the future (for when the fiscal situation changes)



Orientation to Planning & Budget Development Webpage

<https://www.napavalley.edu/about/administrative-services/planning-and-budget-development.html>

- **Strategic Initiative & Operational Optimization Proposals**
 - Proposal Form (download Word file; save locally)
 - Institutional Planning Priorities
 - Timeline
 - Description of the Process
 - Prioritization Rubric
 - [PPt] (to be posted following this Information Session)
 - IT Project Intake Form & Annual Planning Interface
 - IT Project Intake Form (to be posted on “IT Forms for Employees” site this week)

Walk through the content of this part of the webpage



Orientation to Planning & Budget Development Webpage (cont'd)

<https://www.napavalley.edu/about/administrative-services/planning-and-budget-development.html>

- **Context for Planning Related to SI & OO Proposals**
 - Review these materials!
 - Confirm that the innovative idea aligns with the content of the plans
- **Additional Resources**
 - Additional metrics referenced in Dr. Pitman's Flex Day Presentation – focusing on post-graduation success:
 - Attainment of living wage
 - Educational attainment

Walk through the content of this part of the webpage



Inspiring Innovation – Recent SI Submissions

Recent SI Submissions	EMP Goal(s)
○ Customer Relationship Management System (2024-2025) ○ Transformative Technology Tools (2025-2026)	○ Goal 4: Infrastructure Improvements & Fiscal Sustainability
○ Culturally Inclusive Spaces (incl. Student Activities Center, Display of Student Art) (2024-2025 & 2025-2026)	○ Goal 2: Equitable Student Outcomes ○ Goal 5: Culture & Climate
○ Transitioning to Becoming a Distance Education Teaching College (2023-2024)	○ Goal 1: Enrollment Stabilization

Possible Sources of Innovative Ideas/Solutions

- Program Review, Department/Committee/Council Meetings
- Ideas Shared at Brown Bag Lunches (2025-2026)
- Ideas Shared at Budget Workgroup Meeting (Spring 2026)
- Conferences & Flex Day Sessions
- Research/Literature



Tools to Help Expand on the Initial Idea & Engage Others

Posted under “Additional Resources” on Planning & Budget Development Site

- **Strategic Initiatives Planning Template**
- **Think – Pair – Share Template**

Highlight these two items located on webpage



Effective Planning Practices – Sequential Steps

INITIAL STEP

- Begin with an idea
- Think BIG!

COLLABORATE

- Have conversations to develop ideas further (widen the circle)
- Use tools provided to help guide the discussion
- Submit IT Project Intake Form (if applicable)
- Engage appropriate staff to collect estimated costs associated with resource needs/requests (consult)

ENSURE ALIGNMENT WITH EXISTING PLANS

- Review the EMP!!!
- If the innovation is equity-related, review the SEP to confirm alignment (applies to other plans as well)
- Identify specific components of large institutional plans (to be cited within the Submission Form)

COMPLETE THE SUBMISSION FORM

- Focus on THE GOAL of the innovation/initiative
- Use the Institutional Planning Priorities and Prioritization Rubric to help complete the Submission Form – to help ensure alignment with the desired features of a submission and the dimensions on the rubric
- This type of approach aligns with the expectations of the PC, makes the innovation and its impact clearer, ensures direct linkage with existing plans
- *Heed word limits and instructions (including limiting the number of EMP Goals or plans selected)



REMINDERS

Strategic Initiative & Operational Optimization Proposals can be submitted by anyone

Strongly suggested: Involve area supervisor(s) as collaborator

If a technology-related resource is needed for implementation,

- Submit IT Project Intake Form by September 17
- Attach the completed form (including IT input) with the SI/OO submission

Deadline for submission: October 30, 2026



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Questions?