SPOL Training

SPOL URL: https://spol.angelo.edu

Electronic version of training materials is available on SharePoint.
https://www.angelo.edu/live/files/26760-spol-2019-training-materialspdf

In accordance with ASU OP 02.01: Institutional Effectiveness, each department will file annual reports consisting of the following*:

a. **Unit Goals:** Includes the department/program mission statement and overarching and long-term objectives.

b. **Objective Descriptions:** The focus of the unit's effectiveness activity for the year. Does not include all unit objectives or "business as usual," but does include anything of special focus for the year, and, for the academic units, they include student learning objectives.

c. **Linking Goal** (Objective Details): Institutional Goals, Planning Priorities, and Objective Type.

d. **Intended Results/Benchmarks:** The measurable target (e.g., 20% increase with a starting benchmark of 100) the unit aspires to achieve. Intended results/benchmarks are tied directly to the assessment measure and should be clearly stated and defined. Metrics need to align with the objective description, assessment measures, previous use of results, and/or existing standards.

e. **Assessment Measures:** Define how the unit plans to measure achievement of its objectives. A combination of quantitative and qualitative measures and professional judgment can be used. Direct measures of progress are best, but indirect measures can be used along with direct measures.

f. **Actual Results:** The amount of actual progress that was made toward achievement of objectives and are directly related to the measurements used.

g. **Use of Results:** The unit will state how the results will be used to improve the quality of the program(s) or activities. If the criteria for success have been met, the department could raise the bar or could declare the objective attained and move on to another objective. Planning for the next year will depend, in part, on what is learned in the current year.

h. **Evidence/Documentation:** Supporting evidence and documentation for intended results/benchmarks, assessment measures, actual, and/or use of results need to be added to the objective through the document repository.

If Applicable:

i. **Budgetary Implications:** If the suggested improvement has fiscal implications, the plan may be used as a supporting document for budget requests.

***See I.E. Continuous Improvement Planning Rubric at the end of this document for more information on how these items will be measured.**

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Angelo State University Mission

Mission

Angelo State University provides highly competitive graduates to the global marketplace by delivering quality programs in a values-focused and student-centered teaching and learning environment.

Vision

By the end of this decade, ASU will be known as an innovative leader in driving educational, cultural, and economic initiatives to meet the needs, face the challenges, and grasp the opportunities for our region, state, and the global community.

Values

Integrity	Integridad
Diversity & Inclusion	Diversidad & Inclusión
Significance	Impacto
Community	Comunidad
Commitment	Compromiso

Each member of the Ram Family is part of our journey as we continue to build a values-based culture at Angelo State. All planning objectives need to align with Angelo State's overarching mission, vision and values.

Strategic Priorities

Angelo State's strategic priorities follow these five categories:

- Increase Enrollment and Student Success
- Undergraduate and Graduate Programs
- Service, Co-Curricular Experiences, Responsible Citizens, and Productive Careers
- Teaching, Research, Creative Endeavor
- Learning Centered Environment (Facilities and Funding)

To see more details about these metrics view the strategic priorities worksheet on the Institutional Data tab in SharePoint under the institutional plans section. https://www.angelo.edu/live/files/26657-strategic-priorities-envisioning-100-years-a.

Resources

The Accountability webpage under Institutional Data:

https://www.angelo.edu/administrative-support/accountability/research_data.php.

- Interactive Mini Factbook
- Common Data Sets
- Student Satisfaction Inventory (SSI)
- National Survey of Student Engagement (NSSE)
- IPEDS (Integrated Postsecondary Education Data System)
- Peer Institutions

SharePoint Tabs:

- Institutional Data
    - Current reports, surveys, and institutional plans.
    - Major Field Test (MFT)
- Training non-SACSCOC
    - SPOL Training Videos

Envisioning 100 Years & Beyond:
https://www.angelo.edu/live/files/27370-envisioning-100-years-beyond-strategic-plan.

60X30TX: Texas Higher Education Strategic Plan: https://reportcenter.highered.texas.gov/agency-publication/miscellaneous/60x30tx-strategic-plan-for-higher-education/.

Institutional Effectiveness Planning and Budget Timeline:
https://www.angelo.edu/administrative-support/budget-office/budget_development.php

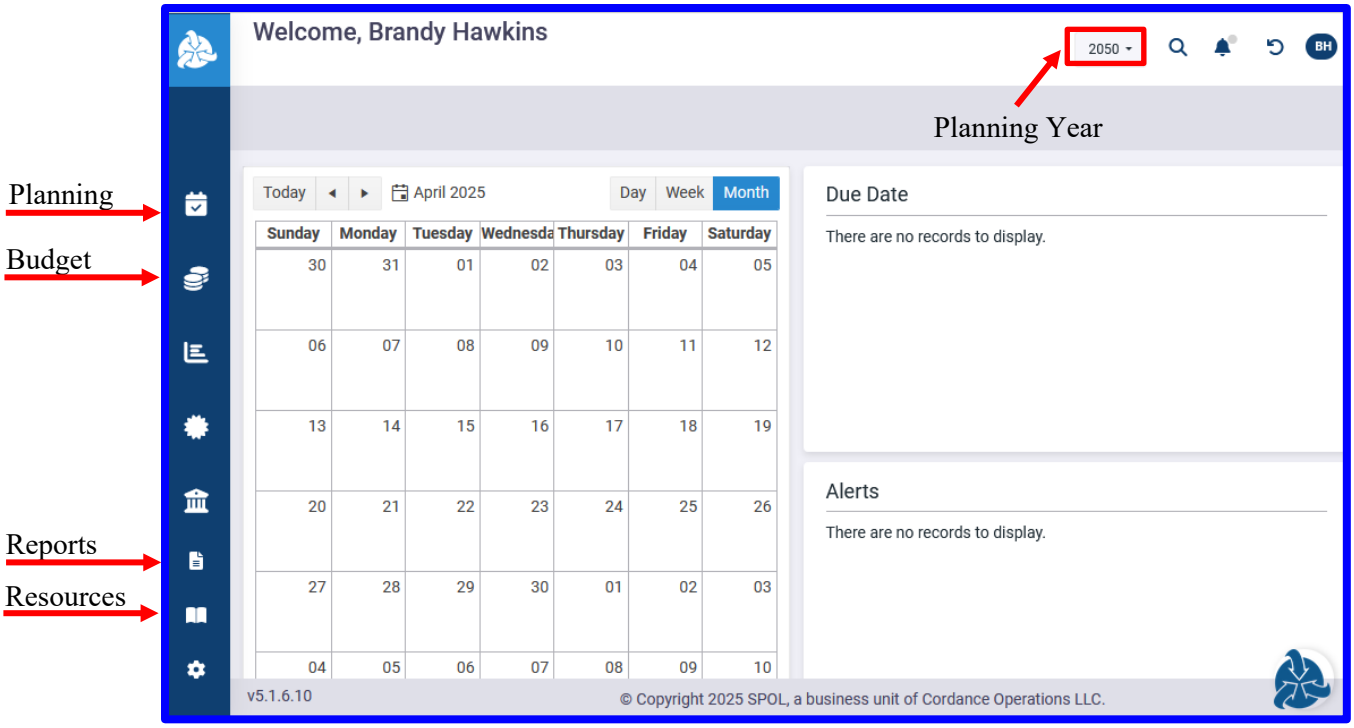
Substantive Change (SACSCOC Accreditation)

Objectives may be considered a substantive change. Reference the operating policy and the substantive change form below for clarification.

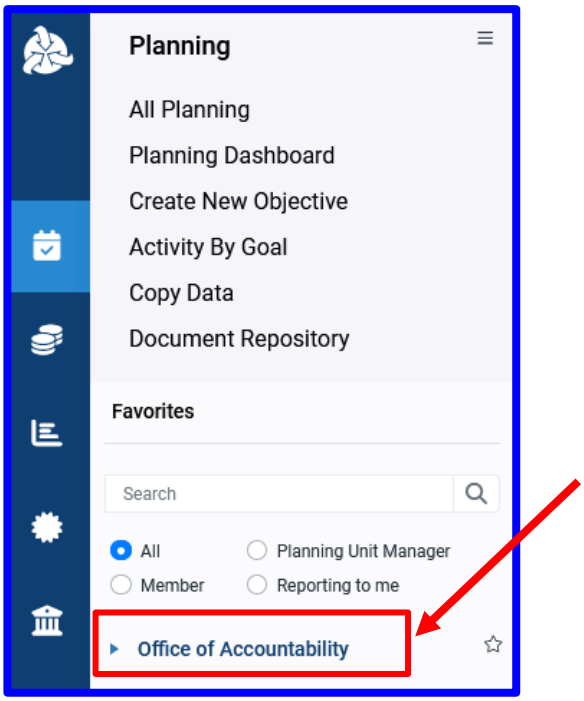
- OP 02.06: Reporting Substantive Changes to Southern Association of Colleges and Schools Commission on Colleges (SACSCOC): https://angelo.policystat.com/policy/11901709/latest/.
- Substantive Change Form: https://www.angelo.edu/live/files/25960-substantive-change-form.

SPOL (Strategic Planning Online) Walkthrough

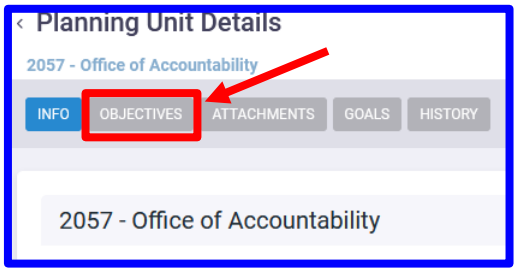
1. Login to SPOL, https://spol.angelo.edu using your ASU credentials.
2. Each department on the Organizational Chart has a planning unit in SPOL with their mission statement, how it ties to the overarching ASU mission, and how it is shared with their areas and users.
3. After logging in you will be on the SPOL homepage. Double check you are in the correct planning year. To access your unit, you will need to click on the planning icon on the navigation bar to the left of the page. Other important icons are budget, reports, and resources.



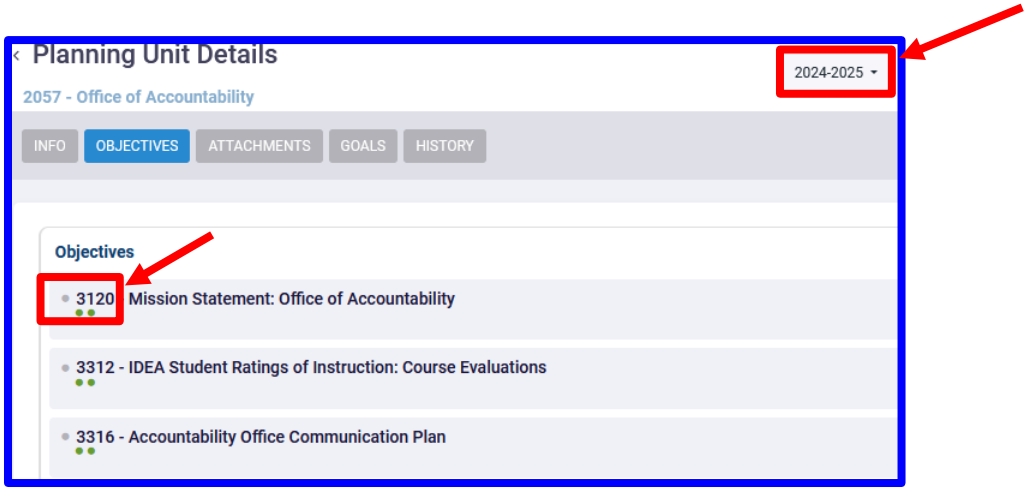
4. Your planning unit will show up to the right of the navigation bar. Click on the unit's name to enter the planning unit details page. This will give information about your unit which includes:
   - Unit manager, and members
   - Parent Unit
   - Budget Accounts



5. To access planning unit objectives, click on "Objectives" at the top of the details page under your unit's name. You will then see your objectives.



6. Important items to note in this section are the objective IDs that precede the objective name. Those are unique identifiers for your objectives. Ensure you are in the correct planning year using the drop down in the top right corner.



7. Clicking on an objective will bring up the objective details which includes:

- Objective status and purpose.
- Planning years the objective is in.
- Description
- Institutional Goals
- Planning Priorities
- Objective Types
- Intended Results/Benchmarks
- Assessment Measures
- Document Repository
- Actual Results
- Use of Results

There are (i) icons next to the sections that are required. If you click on the (i) it will also give you a tip on what needs to be in each section. To fill in these sections click on the section name.

That is how you navigate through SPOL. Below are more detailed cheat sheets for specific actions you may need to take while using SPOL.

Creating a New Objective

1. Go to your objectives within your planning unit following instructions in SPOL Walkthrough above. Once you are there, click on the word "Objectives". That will pull up the new objective box. You will need to fill in the following fields:
   - Objective Title – SMART Objective (Specific, Measurable, Attainable, Results-driven, Time-limited)
   - Planning Unit
   - Muti-Year Checkbox (if applicable)
   - Planning Year
   - Objective Purpose
   - Objective Status
   - Description

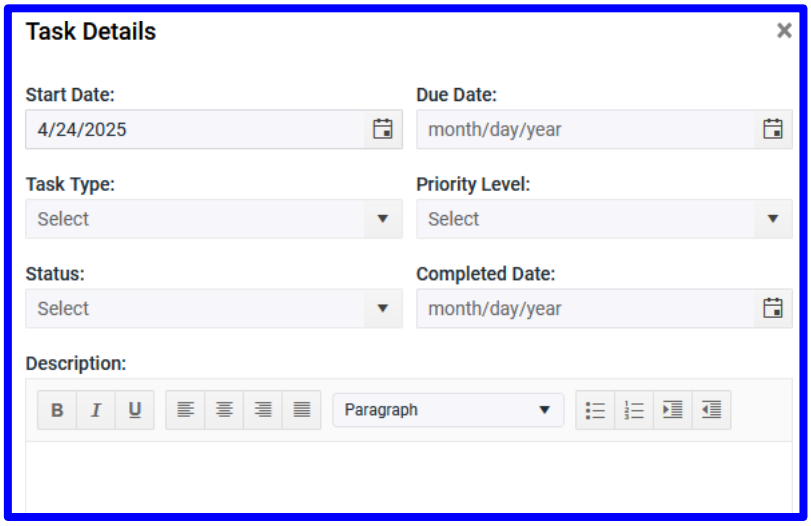
   Once you are done hit the yellow "Save" icon at the bottom.

2. After saving it will open the "Objective Details" page. This is where you will continue filling out all the required sections. When you are done with your objective you will need to approve it. To do so click the arrow under "DRAFT" in the top right corner of the screen. Then Select "Submit for Approval".

Adding A Task to an Objective

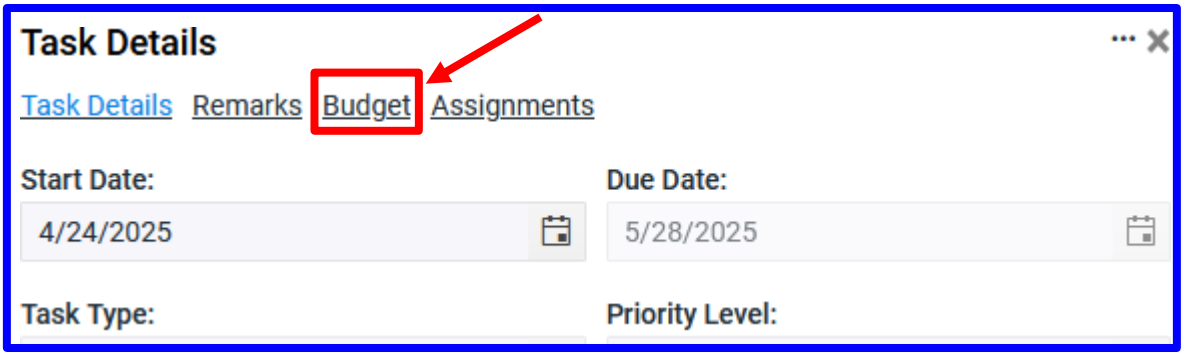
1. If you are wanting to add a task onto an existing objective to request enhanced budget or manage projects, you will need to select "Tasks" to the right of Objectives within the objective's header.

2. Once you are in the "Tasks" section click on the Tasks header, this will bring up the Task Details page. Fill out this page then click the save icon.



Enhanced Budget Request using Tasks

1. To add an enhanced budget request to a specific task, click on the task which will bring up the Task Detail then click Budget. Double check you are in the correct budget year. Select the plus icon.

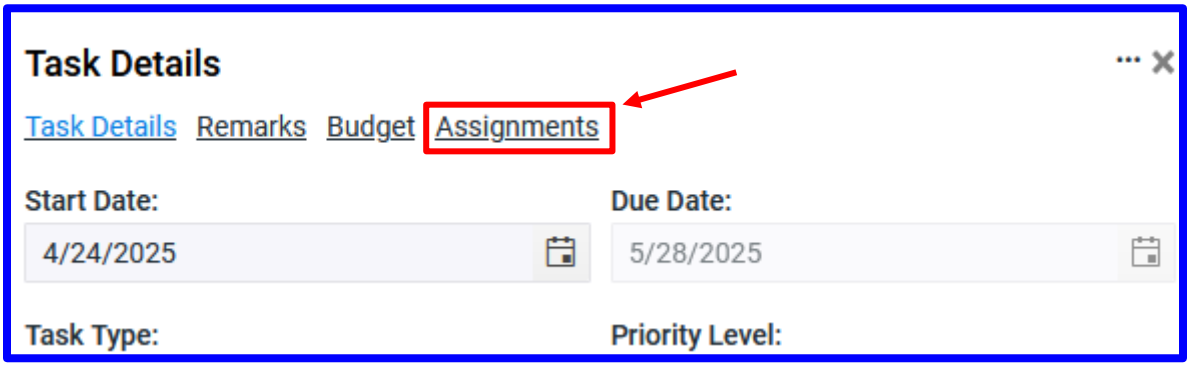


2. Select your budget account and the applicable GL code. This will then bring up the Enhanced Forecast Details. Fill in these areas and click save.

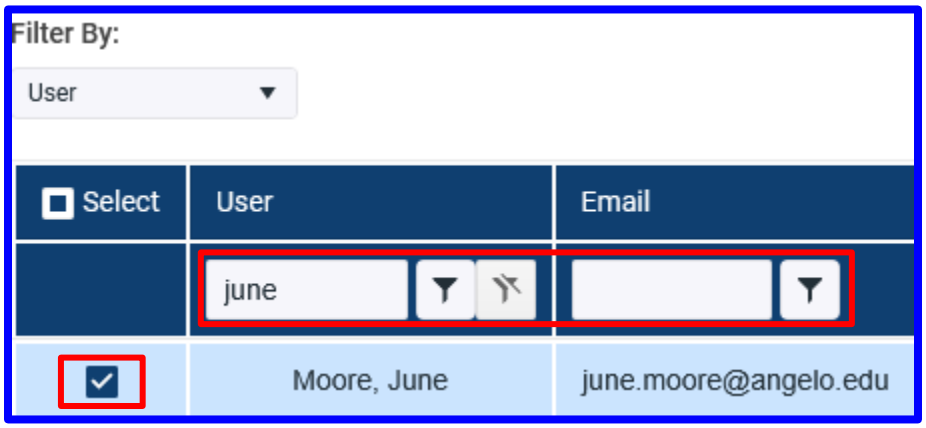
   Helpful Hint: If you want to reorganize tasks you can do so by holding the three-bar icon to the left corner of the task to drag it to another position. ☰

Assigning A Task to a Unit Member

1. Click on the task to open the "Task Details". Click on the "Assignments" header.



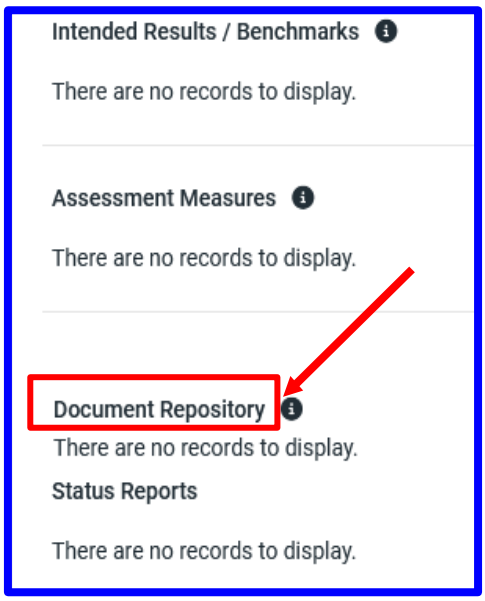
2. Click the blue + Icon to the left of the assignments section. Look up the user you want to assign either by their name or email. After finding the user select the check box and click the yellow save icon.

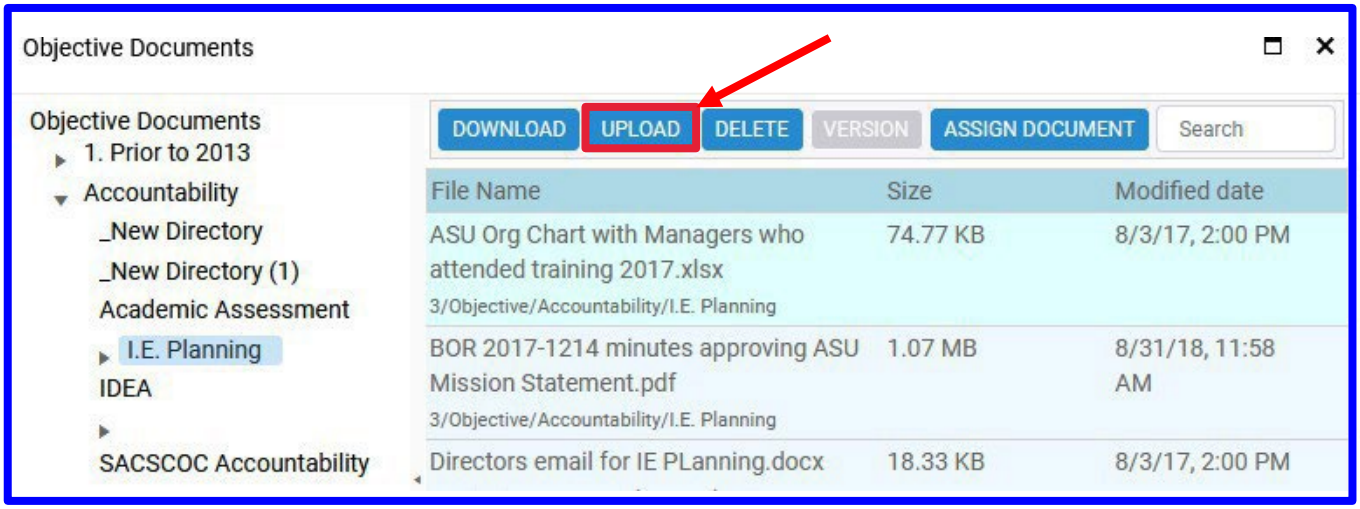


Adding Files to Document Repository

1. To add documentation to an objective you will need to click on the "Document Repository" section under "Assessment Measures" within the objective details page. This will pull up your directory to the left-hand side.

2. Select your directory and then click "Upload" then click "Select Files". Select the file you wish to upload and click open. The dialogue box will show that the file is being transferred to the directory. The file is automatically assigned to that specific objective and will show up in the objective detail page after exiting document repository.

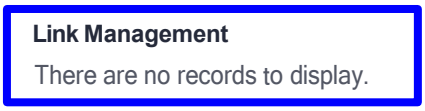




Adding Files to the Link Library

SPOL has a central Web Link Library that serves as a shared central location to catalog frequently referenced web links – particularly those that may be subject to change, Whenever the URL for a web link is updated in the library, it will automatically "update" the link in the objective.

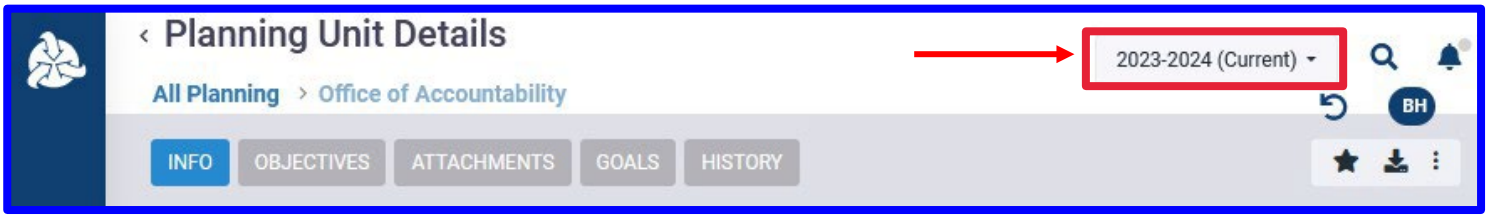
1. In the "Associations" tab there is a Link Management section at the bottom.



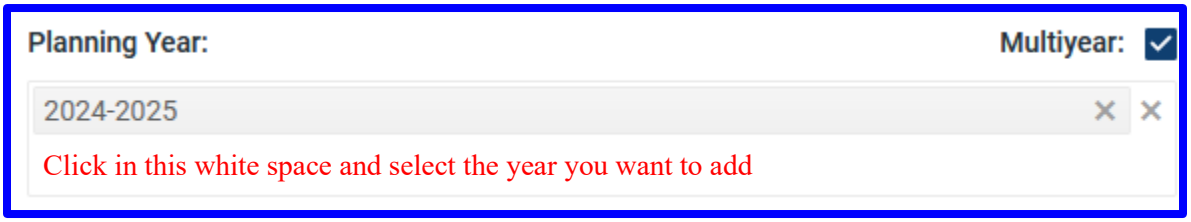
2. Click the title Link Management to open the Link Management window and display the contents of the Link Library.

Helpful Tips and Tricks

- If you think your objectives have gone missing, check to see if you are in the correct planning year.



- If you want to make an objective multi-year or add planning years, click on the "Planning Years" title. The objective detail box will open. To the right of the detail page will be a "multiyear" check box, select the box. Then click within the white space under the planning year title to select more planning years. When you select the extra year(s), it should say the year it started in as well as "x more selected" depending on how many years you have added. Do not forget to save.



Institutional Effectiveness Continuous Improvement Planning Rubric

	Developing	Acceptable	Exemplary
Institutional Mission	Objectives do not support institutional mission. Objectives do not serve as a framework for planning or align with institutional priorities and strategic plans.	Objectives support institutional mission and serve as a framework for planning. Does not clearly align with institutional priorities and strategic plans.	Objectives support institutional mission and serves as a framework for planning. Align with institutional priorities and strategic plans.
Department Mission	General statement of the intent of the program/department. Identifies the functions performed but not the greater purpose. Fails to demonstrate clear alignment with the institution's mission. Too general to distinguish the unit or too specific to encompass the entire mission.	States the department/program's purpose Aligns with the institution's mission statement. Scope and reach may be limited.	Clear and concise. Specific to the department/program (identifies what it does that separates it from other departments/programs). Addresses the larger impact of the program. Aligns with the institution's mission.
Objective Descriptions	Objective descriptions are missing or not stated with purpose of continuous improvement. May not provide measurable terms; does not focus on student learning, strategic priorities, program and/or departmental improvement and effectiveness. Descriptions should not include "business as usual" (i.e., hiring a staff member, expanding hours of operation).	Should provide a clear understanding of the purpose and describe the continuous improvement for the unit. It can have measurable outcomes listed, so the units can track it across time frames. Most descriptions focus on student learning, strategic priorities, program and/or departmental improvement and effectiveness; some objectives address longitudinal outcomes.	All objective descriptions are stated in measurable terms; all descriptions focus on student learning, strategic priorities, program and/or departmental improvement and effectiveness; some objectives address longitudinal outcomes; objectives have stated targets. Describes continuous improvement to the effectiveness of the unit.
Intended Results/ Benchmarks	There are no clearly defined intended results. No benchmarks are included. Do not align with measures and outcomes. Are not clearly defined or give enough information. Aligned with assessment process rather than results (e.g., survey return rate, number of papers reviewed). The multi-year objective is copied from year to year.	Intended results are defined but do not align with the objective, strategic initiative, or mission. Some benchmarks are included and clearly defined. Align with measures and outcomes. Specific and measurable for the intended results.	Intended results are clearly defined, clearly support the objective, and are process-, target-, or satisfaction-oriented. Benchmarks are clearly stated. Align with the objective, measures, and outcomes. Represent a reasonable continuous improvement plan. Specific and measurable for the intended results. Meaningful – based on benchmarks, previous use of results, existing standards.
Assessment Measures	Not all intended results have associated assessment measures. Few or no direct and/or indirect measures were used. The methodology does not align with	At least one (1) assessment measure or measurement approach per intended result. Described with sufficient detail.	Multiple measures for some or all intended results and benchmarks. Direct and indirect assessment measures used, emphasis on direct. Instruments or data gathering reflect

	benchmark. Instruments are vaguely described; may not be developed yet. Course grades are used as an assessment method. **NOTE:** Course grades should not be used as an assessment method.	Implementation may need further planning.	institutional data (strategic priorities, master goals) and continuous improvement planning documents. Described with sufficient detail. Purposeful – clear how results could be used for departmental/program improvement.
Actual Results	Not clearly aligned with intended results and assessment measure(s). Questionable conclusion about whether targets were met, partially met, or not met. Questionable data collection/analysis; may "gloss over" data to arrive at a conclusion.	Align with intended results and assessment measure(s). Clearly addresses whether targets were met and what actually happened with benchmark results.	Align with intended results and assessment measures. Provide solid evidence that targets were met, partially met, or not met. Appropriate data collection/analysis. Compares new findings to past trends, as appropriate. Supporting documentation (rubrics, surveys, reports*, etc.) are included in the document repository. *Reports must be free of student identifiable information.
Use of Results	Not clearly related to actual results. Seems to offer excuses for results rather than thoughtful interpretation or "next steps" for program improvement. No action plans or too many to manage. Too general; lacking details (e.g., time frame, responsible party).	Reflects with sufficient depth on what was learned during the planning year. Clearly states what was learned and if the objective is complete or will continue. If it continues, there is at least one action plan in place.	Exhibits an understanding of the implications of actual results. Identifies an area that needs to be monitored, remediated, or enhanced and defines logical "next steps." Possibly identifies an area of the assessment process that needs improvement. Contains completion dates.
Evidence/ Documentation	No evidence or documentation added to the objective. Evidence and/or documentation added but does not clearly support the intended actual or use of results. Does not support assessment measures.	May not have evidence, but objective did not require or need uploaded documentation as it was fully provided in the planning objective.	Evidence and/or documentation added and supports the intended, actual and/or use of results. Supports assessment measures and closes the loop to understand the need and purpose of the objective and future goals.
Budget		**Yes**	**No**
Additional Funds Requested			
Additional Funds Approved			
Objective Completed with Budget Enhancement and Aligns with Institutional Goals and Mission?			