

Electronic version of training materials are available on Sharepoint under the Training Materials header: <https://angeloedu.sharepoint.com/sites/AccHub-TrainingNon-SACSCOC>

1. Please logon to **SPOL (Strategic Planning Online)** prior to training to be sure you have access. This will be a working training.
  - Use Google Chrome to open SPOL
  - SPOL URL: <https://spol.angelo.edu>
2. Each department has a planning objective in SPOL with their mission statement, how it ties to the overarching ASU Mission, and how it is shared with their areas and users.
  - [OP 02.01: Institutional Effectiveness](#) - "(2) Each department will determine its relationship to specific parts of the Mission Statement and will define its own purpose in terms of the Mission Statement. These descriptions become a permanent part of the department's institutional effectiveness plan. (3) Each department will file annual reports consisting of the following: (a) Unit Goals: These include the department/program mission statement and overarching and long term goals".
  - [ASU Mission, Vision, Values](#)
3. [Student Satisfaction Inventory \(SSI\)](#) objective. Please look over the SSI results. If there are opportunities for your area to address a concern or work on a continuous improvement plan, the objective details page, is a perfect place to use this.
4. What this training will cover:
  - Angelo State University Mission
  - Strategic Priorities
  - Resources (Institutional Data, Comparisons, etc.)
  - Adding Objectives/Unit Goals
  - Assigning Tasks
  - Enhanced Budget Requests
  - Assessment Measures
  - Intended Results/Benchmarks
  - Actual Results
  - Use of Results
  - Adding Evidence/Documents
  - Submitting for Approval
5. What is a substantive change, and does my planning impact it? Who is the responsible party for reporting my substantive change?
  - [OP 02.06: Reporting Substantive Changes to Southern Association of Colleges and Schools Commission on Colleges \(SACSCOC\)](#)
    - i. Substantive Change Form

In accordance with [ASU OP 02.01: Institutional Effectiveness](#), each department will file annual reports consisting of the following:

- **Unit Goals:** These include the department/program mission statement and overarching and long-term goals.
- **Objective Descriptions:** These are the main focus of the unit's effectiveness activity for the year. They do not include all unit objectives or "business as usual," but they do include anything of special focus for the year, and, for the academic units, they include student-learning objectives.
- **Intended Results/Benchmarks:** This is the measurable target (e.g., 10% increase, half as many) the unit works to achieve. It is tied directly to the assessment measure used. Intended results should be clearly defined, support the objective, and be process-, target-or satisfaction-oriented. Benchmarks should be clearly stated and align with the objective, assessment measures, and intended results. They should be specific and measurable and based on benchmarks, previous use of results, and/or existing standards.
- **Assessment Measures:** These 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. Instruments or data gathering reflect institutional data (strategic priorities, master goals) and continuous improvement planning documents.
- **Actual Results:** The results show the amount of actual progress that was made toward achievement of objectives and are directly related to the measurements used. Actual results should align with the objective's intended results / benchmarks and assessment measures.
- **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.
- **Evidence/Documentation:** Supporting evidence and documentation for intended results/benchmarks, assessment measure, actual, and/or use of results can be added to the objective through the document repository. Located at the bottom of the objective.
- **Budgetary Implications:** If the suggested improvement has fiscal implications, the plan may be used as a supporting document for budget requests. Enhanced budget requests should tie to continuous improvement objectives.

# Resources

## 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, Angelo State University 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

## Envisioning 100 Years & Beyond:

<https://www.angelo.edu/live/files/27370-envisioning-100-years-beyond-strategic-plan>

## 60X30TX: Texas Higher Education Strategic Plan:

<http://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](https://www.angelo.edu/administrative-support/budget-office/budget_development.php)

## The Accountability webpage under Institutional Data:

[https://www.angelo.edu/administrative-support/accountability/research\\_data.php](https://www.angelo.edu/administrative-support/accountability/research_data.php)

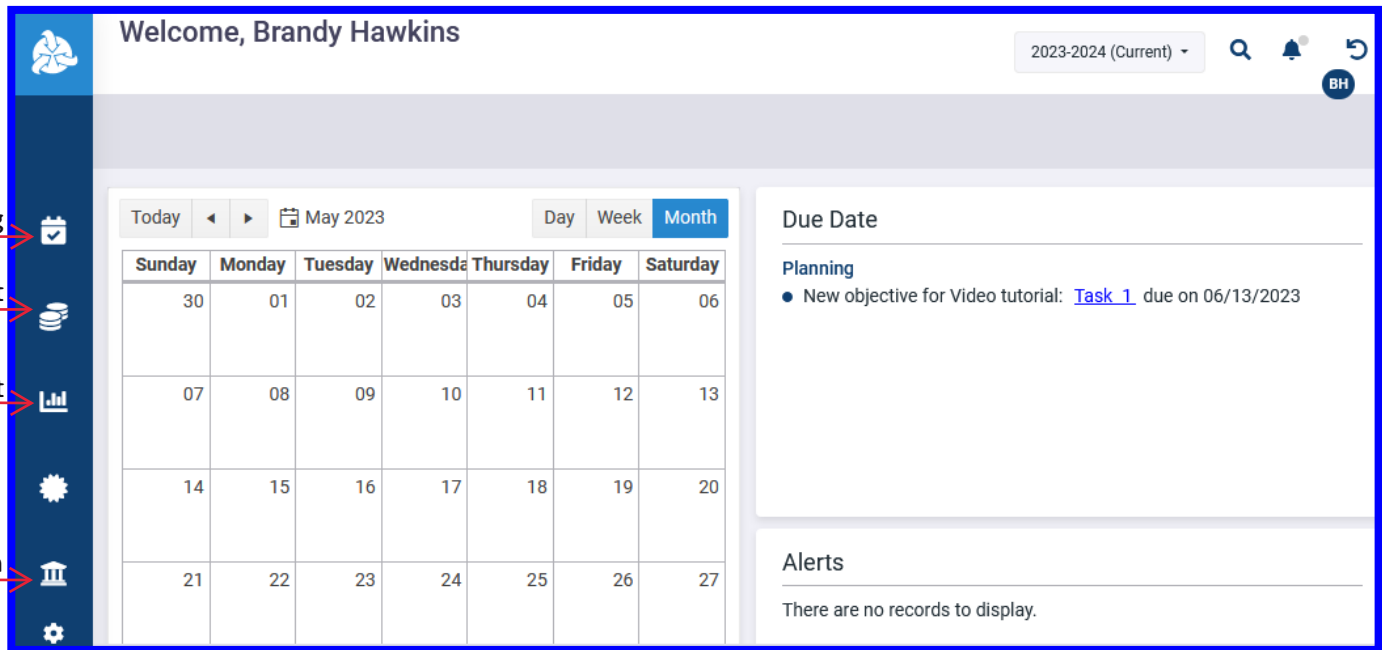
- Interactive Mini Factbook
- Common Data Sets
- Student Satisfaction Inventory (SSI)
- Student Engagement (NSSE)
- IPEDS (Integrated Postsecondary Education Data System)
- Peer Institutions

## Blackboard / Sharepoint Tabs

- Institutional Data
  - Current reports, surveys, and institutional plans
  - Major Field Test (MFT)
- Training Non-SACSCOC
  - SPOL training videos

## Leading the Way (TTUS Strategic Vision)

[https://www.texastech.edu/vision-and-progress/Leading-the-Way\\_2016-Performance-and-Accountability-Report-Retreat.pdf](https://www.texastech.edu/vision-and-progress/Leading-the-Way_2016-Performance-and-Accountability-Report-Retreat.pdf)



## New Objective Cheat Sheet

### Entering a New Objective

1. Click on the Planning icon on the *navigation bar* to the left of the page.



2. Click the Planning Unit you are creating the objective for.

3. This will open the **Planning Unit Details** page. The headers listed are Objective, Tasks, Associations, and History. Click on the Objectives header.

4. To add a new Objective click on the Objectives title. Fill the following Fields:

- Objective Title
- Objective Description – SMART Objective - Specific, Measurable, Attainable, Results-driven, Time-limited

5. Select from the drop-down box:

- Planning Unit – the department that will carry out this objective
- Planning Year – the year the objective will begin
  - Multi-year objectives can be extended into future planning years
- Objective Purpose
- Objective Status

6. Click the save icon (Yellow Button) at the lower right of the page.



7. You will then navigate to the **Objective Details** page.



8. To add a task click on the task header within the objective. Then click the task header again to open the task details box.

9. Enter individual records in each of the following areas:

- **Tasks** – the steps you'll follow or strategies you'll employ to achieve the objective (click the drop-downs to add a start date, due date, task type, priority level, and status, description – (You can sort your tasks in whichever order you like by holding the three bar icon ≡ in the left corner and dragging it to the desired location)

**Task Details** [X]

Start Date: 5/16/2023 [Calendar icon]

Due Date: month/day/year [Calendar icon]

Task Type: Select [Dropdown arrow]

Priority Level: Select [Dropdown arrow]

Status: Select [Dropdown arrow]

Completed Date: month/day/year [Calendar icon]

Description:

[Rich text editor toolbar: B, I, U, List, Paragraph, Bulleted list, Numbered list, Indent, Outdent]

[Cancel] [Save]

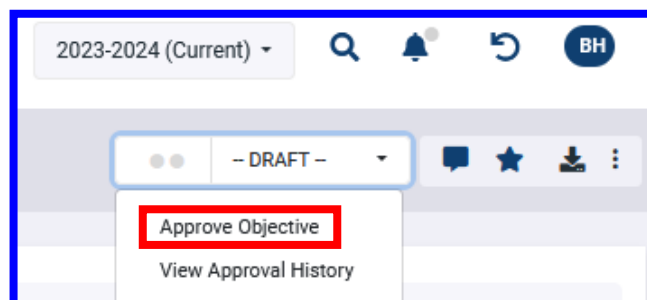
10. Required data to enter:

- **Intended Results** – what you want to see happen as a result of a) the objective overall and b) specific tasks (strategies)
- **Assessment Measures** – the tools, methods, and/or data sources you will use to determine whether or not you achieved your intended results
- **Units Impacted** – select from the list any other departments who will need to assist you in carrying out this objective
- **Adding Evidence** – supporting evidence and documentation for intended results/benchmarks, assessment measure, actual, and/or use of results

11. Bonus data you may want to include:

- **Status Reports** – a good place to add any other information that doesn't fit elsewhere
- **Associated Standards** – create a link between this objective and an accreditation standard, if appropriate

12. Approve the objective by clicking <Approve> at the top right of the page (planning unit managers only). This takes the objective out of draft mode and sends it through to the next approver



# Helpful Tips & Tricks

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

- If you are viewing a multi-year objective, you can easily change or add planning years from within the objective. Click the Planning Years title then an objective details box will open. Then click within the open space under the planning year title to select more planning years (see below).

**Objective Detail**

Objective Title:  
Mission Statement: Office of Accountability

Planning Unit: (Remove Approvals to Edit)  
Office of Accountability

**Planning Year:** Multiyear:

2016-2017  
7 more selected

Click within this open space to add years to the objective

- Attending Open Sessions is a great way to keep up with your continuous improvement objectives. Open Session times are found on the Accountability webpage at <https://www.angelo.edu/services/accountability/accountabilityspol-sessions.php>
- When considering a goal, think about your baseline (where you are now) and your goal (where you want to be).

**Intended Results / Benchmarks**

08/31/2021	A power BI dashboard has been created to assist with helping the faculty liaisons view the current response rates weekly. We would like to see the gap between DC and DE back to the 5%. 2018 - 2019 Response Rates (IDEA) By Modality DC - 35% DE - 40% Main - 51% 2019 - 2020 DC - 39.37% DE - 48% Main - 55.54% 2020-2021 DC - 25.62% DE - 49.49% Main - 52.65% Overall: 47.48%
08/31/2021	Goal: To have less than 10% zero response rates for evaluated courses. Baseline: 2018-2019 there were 363 evaluated courses that had a zero percent response rate out of 2,866 evaluated courses (12.67%). 2019-2020 there were 477 evaluated courses that had a zero percent response rate out of 3,244 evaluated courses (14.70%). 2020-2021 there were 362 evaluated courses that had a zero percent response rate out of 3,213 evaluated courses (11.27%) Out of the total of these zero response courses over (255) 70% of them came from DC.

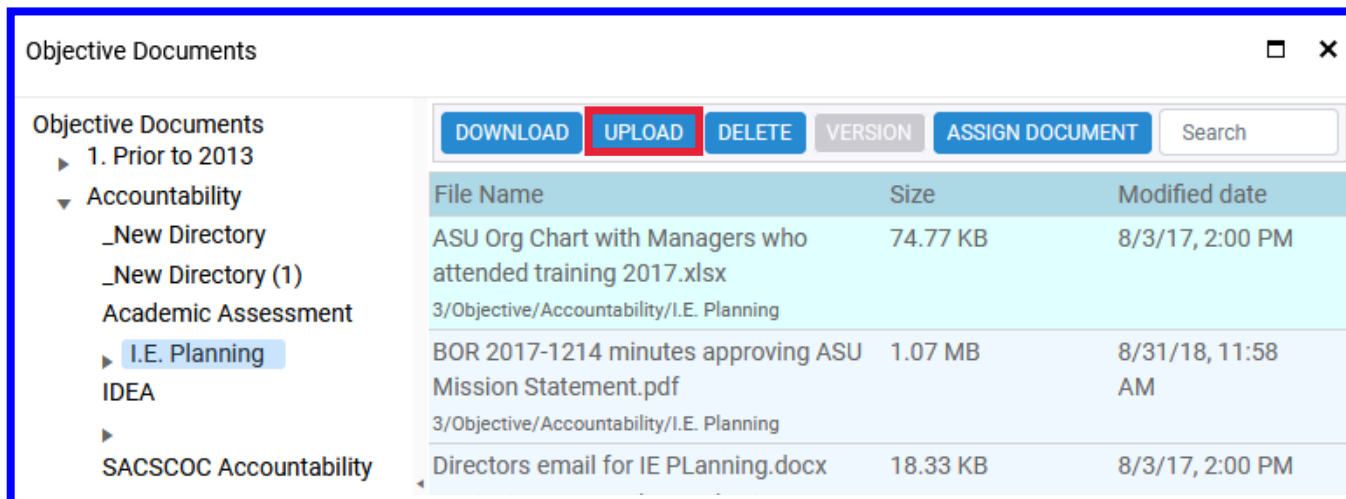
**Assessment Measures**

08/31/2021	To have the dashboard in Rampport by the end of the fiscal year. Response rate percentages and zero response rates.
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## Adding Files

To add a file, click on the document repository at the bottom of the objective. It will display the contents of the directory. Click the caret to the left of the directory name to expand and display sub-directories.

1.e When the directory has been selected, click the <Upload> button.e



The screenshot shows a window titled "Objective Documents" with a sidebar on the left and a main content area on the right. The sidebar contains a tree view with the following items: "Objective Documents", "1. Prior to 2013", "Accountability", "\_New Directory", "\_New Directory (1)", "Academic Assessment", "I.E. Planning" (highlighted), "IDEA", and "SACSCOC Accountability". The main content area has a toolbar with buttons for "DOWNLOAD", "UPLOAD" (highlighted in red), "DELETE", "VERSION", and "ASSIGN DOCUMENT", along with a search box. Below the toolbar is a table with three columns: "File Name", "Size", and "Modified date".

File Name	Size	Modified date
ASU Org Chart with Managers who attended training 2017.xlsx	74.77 KB	8/3/17, 2:00 PM
3/Objective/Accountability/I.E. Planning		
BOR 2017-1214 minutes approving ASU Mission Statement.pdf	1.07 MB	8/31/18, 11:58 AM
3/Objective/Accountability/I.E. Planning		
Directors email for IE PLanning.docx	18.33 KB	8/3/17, 2:00 PM

2.e Click the <Browse> button in the dialog box to browse to the file to be uploaded.e

3.e Click on the file name, and then click the <Open> button.e

4.e The dialog box will show that the file is being transferred to the server; the window will close when the transfer is complete, and the file will be displayed in the Document Management window.e

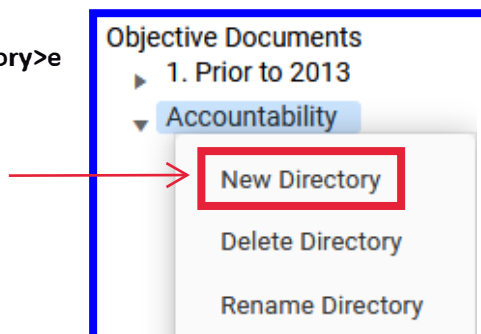
5.e Repeat steps 1-4 to add more documents.e

6.e The file is automatically assigned to the Standard where the upload operation was begun; when the Document Management window is closed, the file will be displayed in the Document Management data store on the Standard Detail page.e

## Adding a Sub-Folder to Directory

1.e Select your department folder.e

2.e Right click and select <New Directory>e



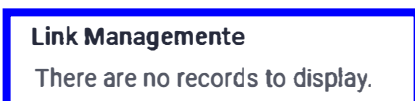
3.e Click in the <Directory Name> field to change the name of the directory.e

4.e Click anywhere outside of the folder to save the name of the directory.e

## Adding Evidence 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.

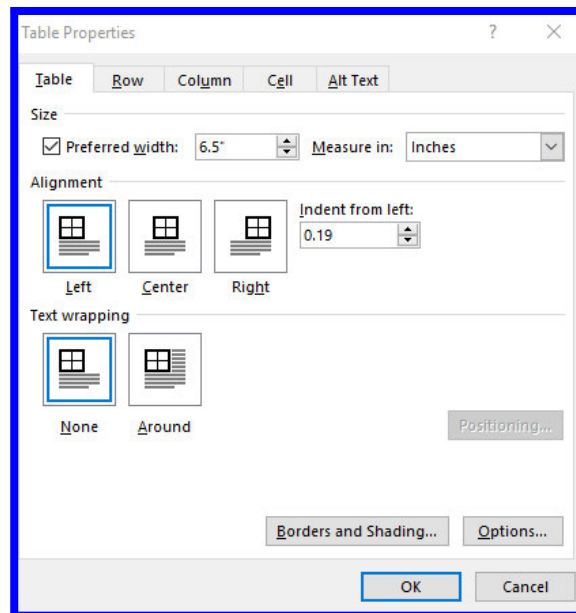
1.e In the Associations Tab there is a Link Management Section at the bottom.e



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

## Formatting in Word before Pasting into SPOL

- Establish 1" margins on all sides, letter-sized paper, portrait orientation, so that the printable space on the page is 6.5" x 9". This conforms to the default page setting established when the narrative is published out of SPOL, so it will give a preview of the final report before pasting into Word.
- Resize all tables to a width of 6.5" or less.
- Make sure there are no hidden rows or columns in tables, otherwise they will display when placed in SPOL.
- Identify formatting and graphics that cannot be supported in HTML, including:
  - Tables placed on the page in landscape view
  - Text that runs in any direction other than left-to-right
  - Graphical elements created with Word tools, including shapes, SmartArt, charts, graphs, and WordArt



## Resizing Tables

For tables to paste smoothly into the HTML editor, they must be no wider than 6.5". You can use the following tips to manage tables.

- In table properties, set the required table width to 6.5". You may need to adjust the table itself, such as resizing columns, to get a good result.
- For very wide tables, you might swap the tables and rows. The end result may be a table that is longer, but narrower.
- The text in the column headers can be oriented to run vertically, which will allow you to lessen the column width. Because vertical text is not supported by the HTML editor, you'll have to capture an image of the resulting table.

