Rolling-up Plans in the District Offices Planning and Program Review

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Prioritizing Objectives at Four Levels

Department Level
- Supervisors/Manager/Administrator
- Accounting and Budget, Accounts Payable, Payroll, Contracts, Purchasing

Division Level
- Directors/Manager
- Fiscal Services, Facilities, Administrative Applications, Distance Education, Institutional Effectiveness, Printing, and Technical Services

Area
- District Police, EDCT, Fiscal Services, Human Resources, KVCR, and TESS

All District Offices
Logging-In

When the Chancellor, a Vice Chancellor, or in some cases a Director/Manager logs in they have the ability to...

◦ ...not only create and edit a Department or Area plan
◦ ...but they can also roll up the goals and resource requests for the Department or Area

Administrator/Supervisor → Department
Division → Director/Manager
Vice Chancellor → Area
Chancellor → District Offices
Area
Division
Department

- District
  - District Police Department
  - EDCT
  - Fiscal Services
    - Accounting
      - Budgeting
      - Payroll
    - Business Services
    - Facilities
    - Internal Auditing
  - Human Resources
    - Safety and Risk Management
  - KVCR
  - Technology and Educational Support Services
    - Administrative Applications
    - Distance Education
    - District Institutional Effectiveness, Research, & Planning
    - Printing Services
    - Technical Services
Rolling Up a Plan
(Combining Objectives)

Step 1 – Click on the Department, Division, or Area Level

- **Test Parent**
  - **Test 1**
  - **Test 2**

- **District**
  - **Distributed Education and Technology Services**
    - **Distributed Education**
    - **District Computing Services - Administrative Services**
    - **District Computing Services - Technical Services**
    - **EduStream**
    - **Print Shop**
  - **District Police Department**
  - **EDTC**
Rolling Up a Plan (Combining Objectives)

Step 2 – Click on “Create a New Annual Plan or Program Review”

Plans for Test Parent

- Create a New Annual Plan or Program Review
- Create Annual Plan or Program Review by Copy

**Name:** PPR Test - Editing Progress Report  
**Version:** 4  
**Group:** 2011 - 2012  
**Type:** CHC Program Review 2011-2012  
**Last Modified On:** 11/3/2011 1:44:59 PM  
**Last Modified By:** Michelle Riggs  
**State:** Locked for Editing  
**State By:** Michelle Riggs

- **Edit Plan**  
- **View Versions**  
- **View Objective Priority List**  
- **View Goal Priority List**  
- **Reports**  
- **View Plan**

- In order to Edit this plan, it must be unlocked.  
- In order to comment on this plan, it must be submitted and not locked.
Rolling Up a Plan
(Combining Objectives)

Step 3 – The Plan Type and Group will default to the current year plans.

Plan for Test Parent >> New Plan

**Entity Name:** Test Parent

* **Plan Type:** CHC Annual Planning 2013-2014

* **Plan Group:** 2015 - 2016

This Entity has children. Please select plans below to roll up their Goals and Resource Requests.

Test 2: Copy of Test 2 Program Review
Test 1: Test Unit Plan 1

Are you sure you want to create a new plan for this entity?

[No] [Yes]
Rolling Up a Plan (Combining Objectives)

Step 4 – Select the plans while holding down the control key

Plans for Test Parent >> New Plan

Entity Name: Test Parent
Plan Type: CHC Annual Planning 2013-2014
Plan Group: 2015 - 2016

This Entity has children. Please select plans below to roll up their Goals and Resource Requests.

Test 2: Copy of Test 2 Program Review
Test 1: Test Unit Plan 1

Are you sure you want to create a new plan for this entity?

No Yes
Rolling Up a Plan (Combining Objectives)

Step 5 – Click “Yes”
Rolling Up a Plan
(Combining Objectives)

The new roll-up plan has been created.

You can view and edit the plan and objectives just like you can with other plans.

- **Name**: Test Plan Roll-Up
- **Version**: 1
- **Group**: CHC Roll Up Plan
- **Type**: CHC Program Review
- **Last Modified On**: 2/9/2011 9:25:25 AM
- **Last Modified By**: Keith Wurtz
- **State**: Available for Editing
- **State By**: Keith Wurtz

- Edit Plan
- View Versions
- View Objective Priority List
- Reports
- View Plan
- Submit Plan (Draft)
- Submit Plan (Finalized)
- Delete Plan

In order to comment on this plan, it must be submitted and not locked.
Rolling Up a Plan (Combining Objectives)

Step 6 – Click on “Reports” to roll-up the objectives and resources into Excel

- **Name:** Test Plan Roll-Up  
  **Version:** 1  
  **Group:** 2010 - 2011  
  **Type:** CHC Program Review  
  **Last Modified On:** 2/9/2011 9:25:25 AM  
  **Last Modified By:** Keith Wurtz  
  **State:** Available for Editing  
  **State By:** Keith Wurtz

  - [Edit Plan](#)  
    - [View Versions](#)  
      - [View Objective Priority List](#)  
        - **Reports**  
          - [View Plan](#)  
            - [Submit Plan (Draft)](#)  
              - [Submit Plan (Finalized)](#)  
              - [Delete Plan](#)  
              - In order to comment on this plan, it must be submitted and not locked.
Rolling Up a Plan (Combining Objectives)

Step 7 – Click on “View Objective Priority List” to prioritize the objectives.
Rolling Up a Plan (Combining Objectives)

Step 8 – Prioritize objectives either by clicking on the arrows or by clicking on the numbers. View goals and resources by clicking on details.

<table>
<thead>
<tr>
<th>Id</th>
<th>Priority</th>
<th>Title</th>
<th>Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>7.1</td>
<td>1</td>
<td>Facilitate the continued development and streamlining of the outcomes assessment process by collecting, documenting, and analyzing institutional, program, and course level outcome data.</td>
<td>Details</td>
</tr>
<tr>
<td>34.2</td>
<td>2</td>
<td>Adequately support the operations of the new buildings.</td>
<td>Details</td>
</tr>
<tr>
<td>34.3</td>
<td>3</td>
<td>Provide cleaning services to maintain the health and safety of the campus.</td>
<td>Details</td>
</tr>
<tr>
<td>23.1</td>
<td>4</td>
<td>Increase student engagement and involvement by facilitating increased participation in student clubs as measured by an increase in the number of students participating in clubs as well as the number of club activities on campus.</td>
<td>Details</td>
</tr>
<tr>
<td>106.1</td>
<td>5</td>
<td>Support the learning of cognitive, affective and psychomotor skills through a new FT Faculty hire.</td>
<td>Details</td>
</tr>
<tr>
<td>32.6</td>
<td>6</td>
<td>Increase full time faculty staffing in the tutoring center</td>
<td>Details</td>
</tr>
<tr>
<td>3.3</td>
<td>7</td>
<td>Provide consistent front line reception, scheduling and information service and support to ensure optimal student access to mandated SSSP services.</td>
<td>Details</td>
</tr>
<tr>
<td>6.1</td>
<td>8</td>
<td>Provide continuous A/V support during hours of operation. Increase available man-hours during semester breaks for maintenance of A/V equipment</td>
<td>Details</td>
</tr>
<tr>
<td>18.1</td>
<td>9</td>
<td>Increase FTES according to growth plan.</td>
<td>Details</td>
</tr>
<tr>
<td>18.2</td>
<td>10</td>
<td>Increase class fill rates according to growth plan.</td>
<td>Details</td>
</tr>
</tbody>
</table>
Rolling Up a Plan (Combining Objectives)

Step 9 – Click on “Reports” and then “Objective Priority Report” to export objectives and resources into Excel

Plans for District

- Create a New Annual Plan or Program Review
- Create Annual Plan or Program Review by Copy

- **Name:** 2014 - 2015 District District Program Review  
  **Version:** 2  
  **Group:** 2014 - 2015  
  **Type:** District Program Review  
  **Last Modified On:** 3/5/2015 2:39:13 PM  
  **Last Modified By:** Albert Maniaol  
  **State:** Submitted (Finalized)  
  **State By:** Albert Maniaol

- Objective Priority Report
- Goal Priority Report
- Progress Report

- View Versions
- View Objective Priority List
- View Goal Priority List
- Reports
- View Plan
Rolling Up a Plan (Combining Objectives)

For each program the following fields are exported to Excel: Area, Area Priority, Area Objective, Division, Division Priority, Division Objective ID, Department, Department Priority, Department Objective Id, Objective, Goal, Impact Type, Resource ID, Resource, Resource Type, Expenditure Category, Year 1-3 Cost, and Year 1-3 Savings
Rolling Up a Plan
(Combining Objectives)

Important to Remember
◦ Only Plans that are (Finalized) are rolled-up
Questions

DO YOU PREFER THAT I SPEND THE DAY PLANNING, WHICH DOESN'T LOOK LIKE WORK?

OR SHOULD I PLUNGE INTO MY PROJECT WITH AGGRESSIVE RANDOMNESS?

HE TOLD YOU TO NOT WORK?

HE DOESN'T KNOW IT YET.