CREATING AN OBJECTIVE (PLAN OF ACTION)

The last step of the CPR, APP, or ALUR process is to create one or more objectives which define the planned activities for the upcoming year or multiple years.

- Go to the **Planning** tab.
- Click on **Create a New Planning Objective**.

- Complete the Create a New Objective form.
  - **Enter a short, descriptive title** (5-8 words) in the Objective Title box.
  - **Choose your planning unit** (department for CPR/APP or unit for ALUR) from the drop-down list
  - **Choose** "**Program Review – CPR/APP/ALUR**" for the Objective Status
  - **Choose** an Objective Status of "**New/In Progress**"
  - **Write a description** of the objective (plan of action) the program or unit intends to accomplish. The description should describe what the program intends to do over a specified time period and the expected results (how success will be measured). The objective description should be at the summary level as more detailed action steps to accomplish the objective will be listed along with resource requests in a different section.
  - Click [icon] to SAVE.

> **The planning year is the upcoming year for which activities are being planned.**
> If your objective will span multiple years, you may select "Yes" under Multi-Year Objective. However, keep in mind that resource requests occur annually. Single year objectives can be copied to the next year if additional resources are needed which can provide a multi-year plan without selecting multiple years when creating the objective.
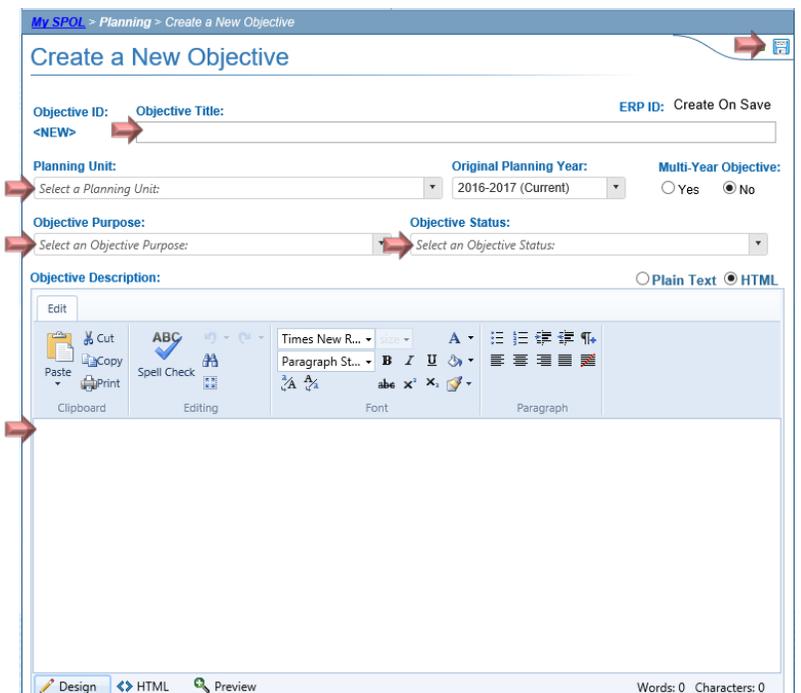
- On the next screen, **check out** the newly created objective by clicking [icon] at the top corner.
- **Choose Institutional Goals** (District/College Goals) to which this objective aligns. Click [Select] for a list. *See next page for more details.*
- **Choose** the **Associated Standards** to which this objective aligns. Click [Select] and associate with the last standard in the CPR, APP, or ALUR that was just completed. *See following pages for more details.*
- **Add Action Steps** and **Resource Requests** by clicking [Add]. *See following pages for more details.*
- Optional: Upload any supporting documentation to the folder for your area.
- Check in the objective by clicking [icon] at the top corner.
- Return to the main page by using the back arrow. [icon]

Objective Details

Develop a New Strategic Plan

TEST11000 - TEST - Training Planning Unit
Unit Manager: Jones, Cheri
Email Unit Manager: [Send Email]

🛈 **Draft**
-- DRAFT --

Approval Notes: 📋
Note Options ▼

Approval Status: ◯ ◯
Approval Options ▼

Objective Details
[Add] [Edit] [Delete]

Objective ID: 8   **Status:** New/In Progress   **Objective Purpose:** Program Review - CPR/APP/ALUR

The current strategic plan expires in 2017. A new Skyline College strategic plan will be developed which aligns with the District's strategic plan and covers the time frame of 2018-2023. A collaborative planning process involving representatives from various constituencies will be facilitated through existing governance structures.

Planning Years

Planning Year	Start Date	End Date
◉ 2016-2017 - (Current)	07/01/2016	06/30/2017

Institutional Goals (District/College Goals)
[Select]
There are no records to display

Associated Standards (CPR, APP, or ALUR)
[Select] [Remove]
There are no records to display

Action Steps and Resource Requests
[Add] [Edit] [Expand All]
Total Objective Budget: $0
There are no records to display

#### Document Management
[View] [Add] [Remove]
There are no records to display

Choosing Institutional Goals

- After clicking **Select**, the pop-up window will display with a list of goals. Choose from various plans under Goal Category.
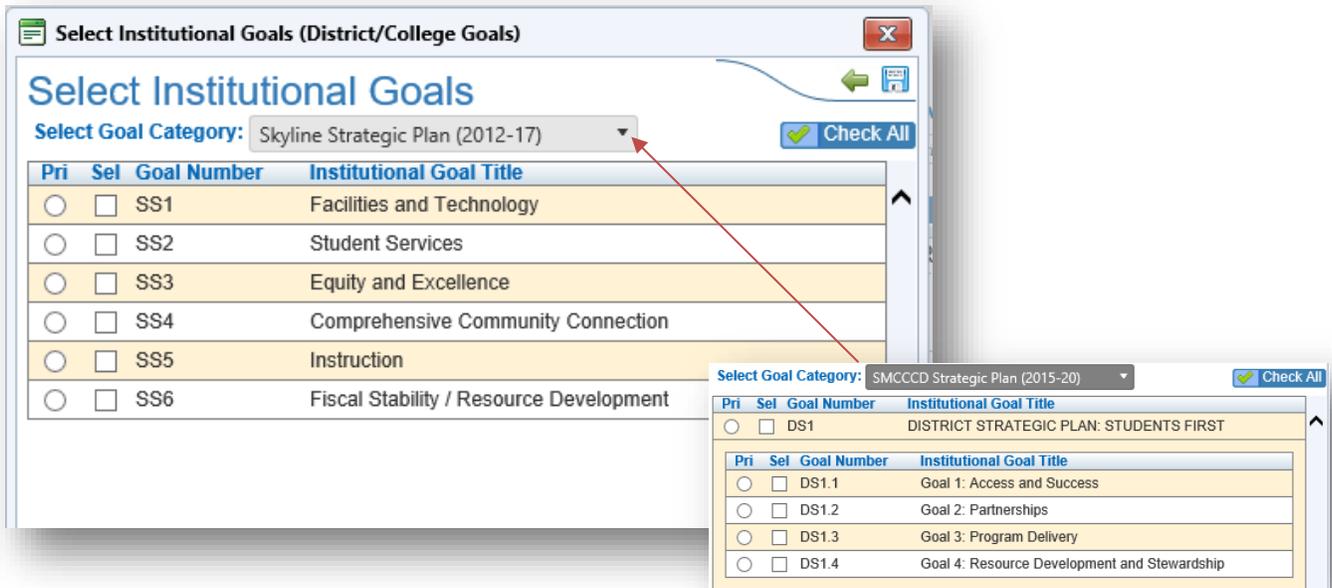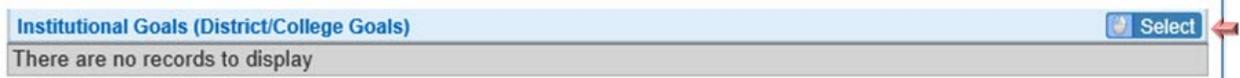
- For at least one plan, choose a **primary (PRI)** goal to which the objective aligns. You may add other secondary selections (SEL) by checking additional boxes.
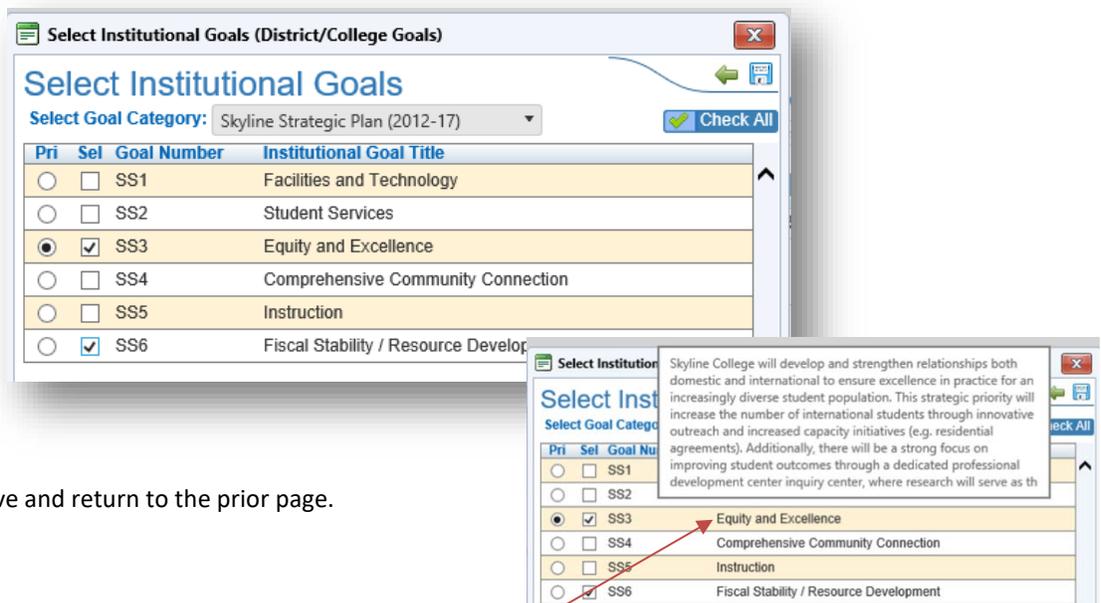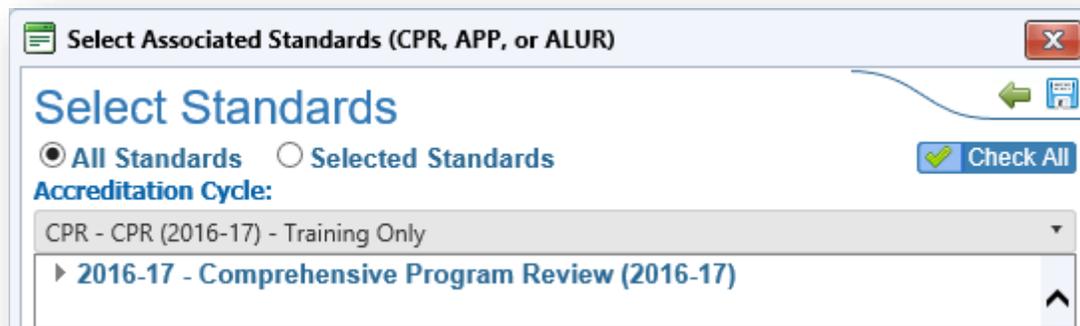

- Click [save icon] to save and return to the prior page.

Hint: Not sure which to choose? Use your mouse to hover over the goal title for a description.

Choosing Standards to Associate

- After clicking **Select**, click the arrows ▶ to expand the list next to the CPR, APP, or ALUR that has just been completed.

- **Check the box** next to the last standard in the CPR, APP, or ALUR for the current program review year. The standard should reference "Action Plan and Resource Requests" under Strategy for Program Enhancement.
- Click 🖫 to save and return to the prior page.
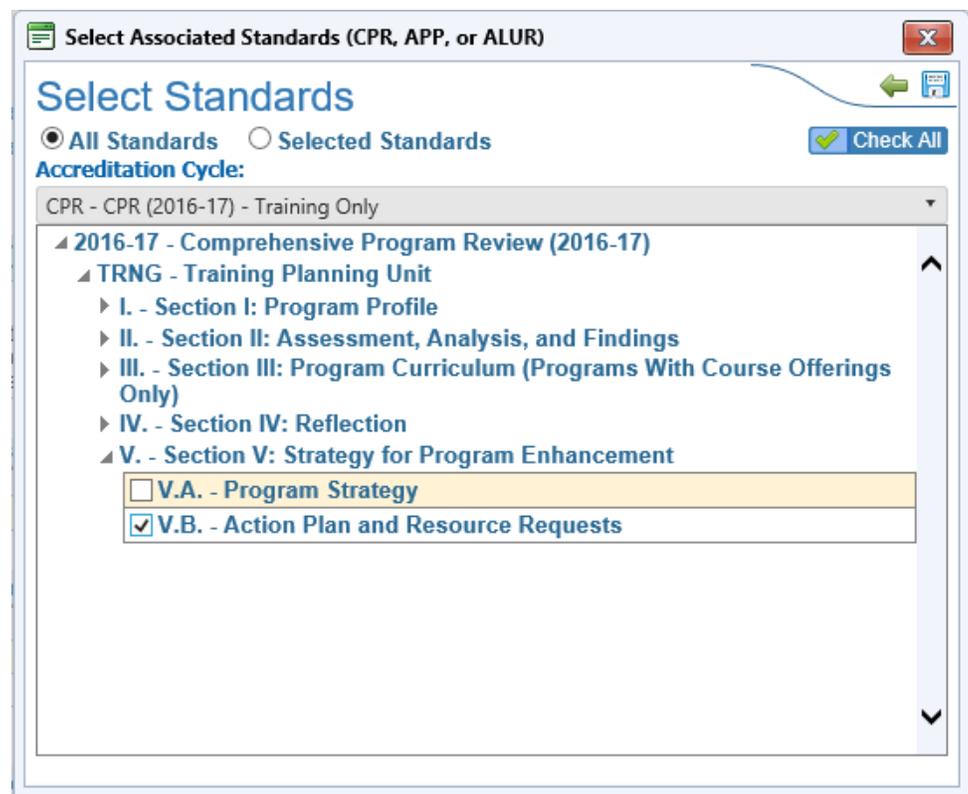
Creating Action Steps and Resource Requests
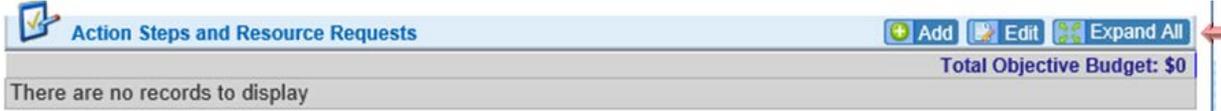
- After clicking **Add**, complete the pop-up form to define your first action step.
    - **Choose a start date** in the upcoming year.
    - For Type, choose "**Department/Division/Unit**".
    - **Decide on a priority level.** Required items (e.g., new mandated services) should always be high priority.
    - Optional: Include a due date if one has been determined.
    - Set the Status to "**New/Pending**".
    - **Add a brief description** of the action step (what you intend to do in this step).
    - Click **SAVE**.
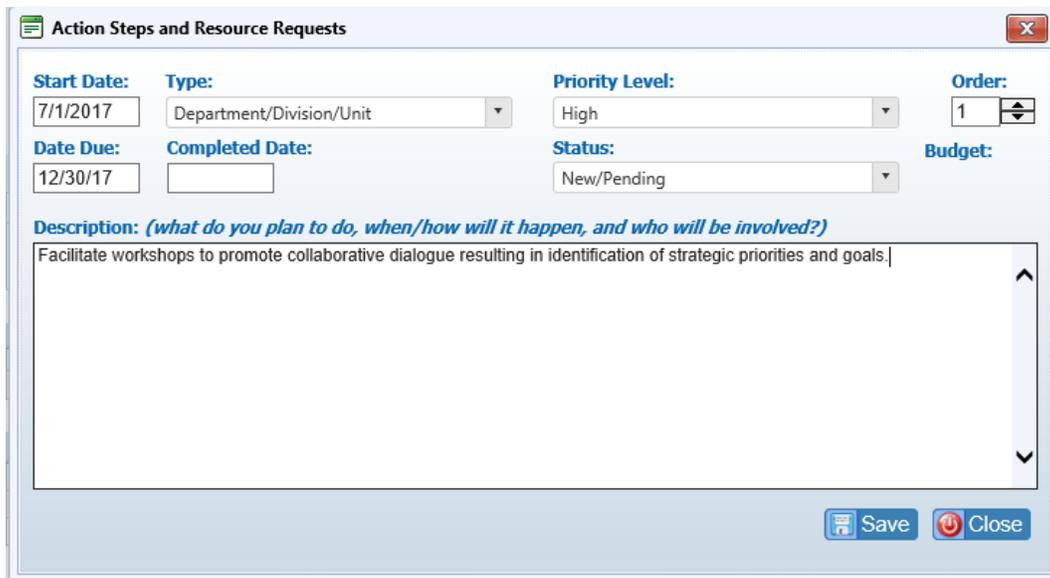
An updated version of the form will display. It automatically has a budget of zero.

- If you can accomplish the action step **within your existing budget**, click **CLOSE** to return to the main page.
- **If you need resources**, see following pages for more details.

Requesting Resources (Budget Requests)

SPOL is used to request resources to complete the objectives or action plans created during the CPR, APP, or ALUR process. These resources are in addition to the program or unit's existing (base) budget.

1. **If resources (funding) are needed to complete an action step, make sure to include a budget request.**
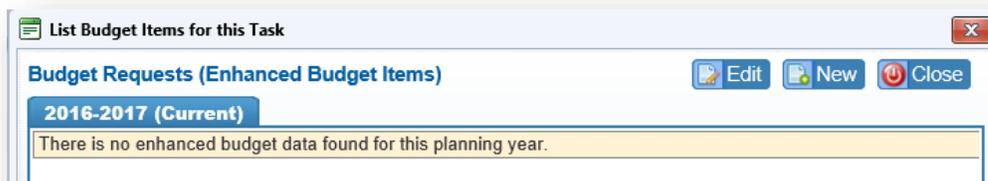2. **If the budget is zero, it is assumed that you can complete this step within the program or unit's existing budget.**

Adding a Request

- From the Action Step for which resources are needed, click **View Budget Requests**. (This button only displays after the Action Step is initially saved.)
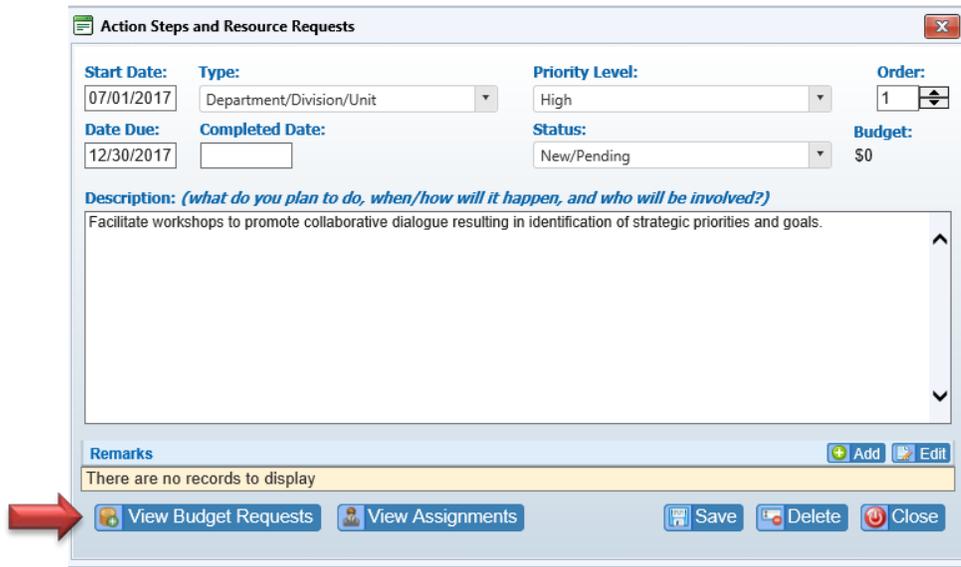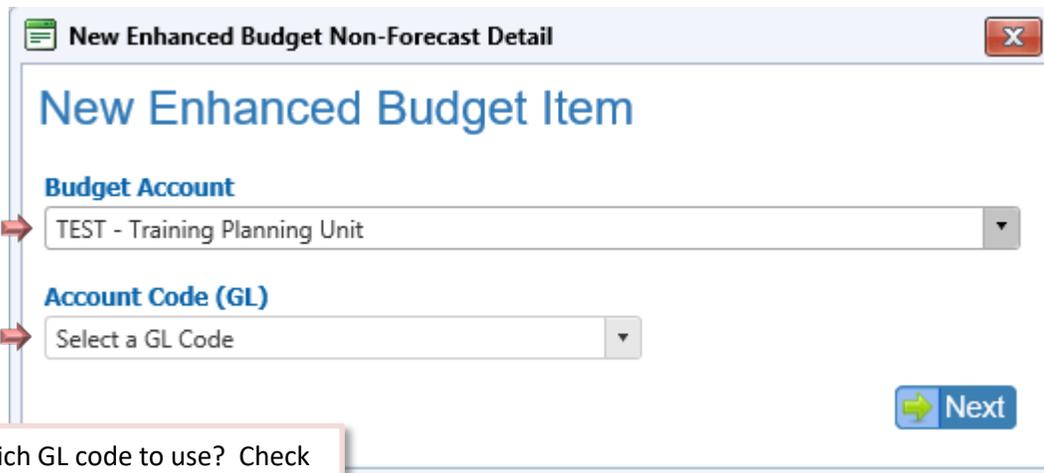

- Click ![New] in the upper corner to add a new request for resources.

- **Select your program (CPR/APP) or unit (ALUR)** from the list of budget accounts.
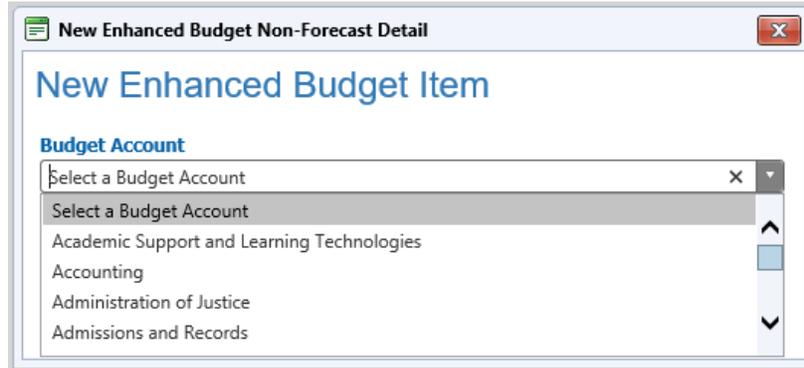
- **Select the Account (GL) Code** for the resource request from the drop-down list. Click **Next**.

Not sure which GL code to use? Check with your division assistant or dean.

Hint: Every department/division has been provided with the full list of account codes in the drop-down menu. The PRIE office (SPOL administrator) or your program's SPOL lead (planning unit manager) can customize the drop-down menu for your program by unselecting codes which are not frequently used.

- **Enter the amount** the program or unit is requesting.
- **Provide the itemized cost** (40 folders @ $2 = $80) **and justification** for why the resources are needed.
- Click **SAVE**. The form will update to show the Remarks area. Click **CLOSE**.

- If additional resources are needed for this action step, click New. Otherwise, click **Close** to return to the Action Step page. Click **Close** again to return to the main Objective page.

SUBMITTING OBJECTIVES AND RESOURCE REQUESTS

Once all action steps and resource requests have been added, check-in the draft objective. The planning unit's designated SPOL lead (unit manager) will approve the objective to send it into the review process.

If the planning unit's SPOL lead is not the last person working on the objective, any planning unit member may choose "Submit for Approval". This action will send an email to the SPOL lead to prompt him or her to approve the objective.

Planning Unit Manager View

Planning Unit Member View

At the appropriate time, supervising administrators will take action to approve objectives and resource requests which forwards the recommended budget to the next level for approval. Once the request reaches the final level, Administrative Services will allocate available funding. The funded amount and FOAP will be recorded in SPOL on each resource request. Administrators can also provide feedback during the approval process and return (reject) items back to the program/unit for updating.

Below is an example from the vendor of an objective (plan of action) with related action steps (tasks) and resource requests.

Example

Objective ID: 44

Unit Manager: Hall, Tracy

Obj. Status: In Progress

Objective Title: Grant Writing Educational Series

Planning Unit: 11000 - Institutional Effectiveness

Objective Description:

Develop and implement an educational series covering the skills and knowledge needed for grant writing. The series will run through the fall and spring semesters; will be offered to all faculty, staff and administrators; and will follow a progression that should result in draft proposals by the end of the series.

Institutional Goals	Objective Types
College Personnel	* Strategic Theme: Strong & Viable Institution
Fiscal Resources	Baccalaureate Programs
	Strategic Theme: Communication

Action Steps and Resource Requests

Due Date	Status	Priority	Task	Budget Amount
05/16/2010	Complete	High	Identify the skills sets and knowledge needed by grant writers, and then organize them into coherent training sessions (10 sessions maximum).	$0
05/23/2010	Complete	Medium	Organize the sessions into a series that would progress through the grant writing process so as to encourage participants to develop a real proposal in the process of taking the series.	$0
05/30/2010	Complete	High	Identify faculty and staff who are experts on each topic, and invite them to teach specific sessions in the series.	$0
08/22/2010	Complete	High	Select specific dates for each session and confirm the availability of instructors.	$1,500
09/09/2010	Complete	Medium	Announce the series to all administrator at President's Staff Meeting and ask them to encourage their employees to participate.	$0
N/A	Ongoing	High	Schedule the sessions in Technology Center rooms where video recording is available (T-110, T-309, T-300).	$0