SPOL Planning

Change Your Password and Update Your Personal Information

1. Click on <Planning> on the navigation bar at the top of the page.
2. Click <Create a New Objective> on the Planning Homepage.
3. This will open the Create/Edit a New Objective page.
4. Fill in the following data:
   - **Objective Title**
   - **Objective Description** – SMART Object – Specific, Measurable, Aggressive/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 (blue diskette) at the upper or lower right of the page.
7. You will then navigate to the Objective Details page.
8. If you want to add more planning years, click <Edit Planning Years>; when the new window opens, select additional years, and then save.
9. Tie your objective to:
   - **Institutional Goals**
   - **Objective Types**
   - **Planning Priorities**
10. To do this, click on the <Edit> button to the right of that data store. When the window opens, select as many items as appropriate (using the check boxes). Select one of these to be the “primary” by clicking the round radio button to the left of the check box. Click <save> to close the window and record your selections.

11. Enter individual records in each of the following areas (use the <Add> button to add a new record; to edit an existing record, either double-click on it or single-click to select and then click <Edit>):
   - **Tasks** – the steps you’ll follow or strategies you’ll employ to achieve the objective (click the drop-downs to add a due date, priority, and status – use sort order to put the tasks in a specific order)
   - **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

12. Option data you may want to include when writing a new objective:
   - **Status Reports** – a good place to add any other information that doesn’t fit elsewhere
   - **SWOT Analysis** – to analyze your internal Strengths and Weaknesses and external Opportunities and Threats relative to this objective
   - **Associated Standards** – create a link between this objective and an accreditation standard, if appropriate
   - **Associated Outcomes** – create a link between this objective and an assessment outcome, if appropriate
   - **Document Management** – upload a document with supporting information

13. Approve the objective by clicking <Approve> at the top of the page. This takes the objective out of draft.

**Closing the Loop: Reporting Results**

**Mid-year and at the end of the year,** enter the following:
   - **Status Reports** – detailing what has happened, challenges faced, successes achieved, changes in strategies, etc.
   - **Actual Results** – describe what actually happened; actual results should relate to intended results and might be determined using the assessment measures you identified
   - **Use of Results** – describe what is next for continuous quality improvement... knowing what you know now, what might you do differently in the future?
   - **Gap Analysis** – this provides a framework to link together an intended result, actual result, and use of result, and gives you additional space to describe your analysis of performance gaps and action plans to be taken to close the gap in the future