

Inputting 2018-19 Program Review Update in SPOL

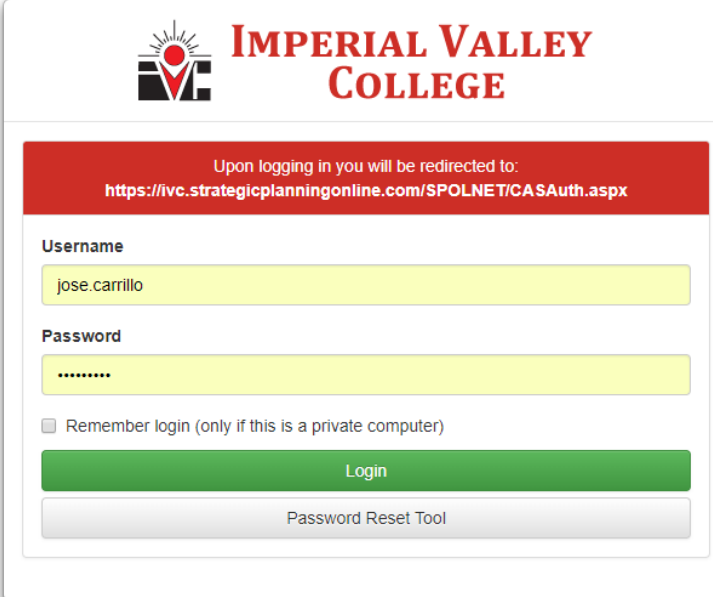
Program review is entered in two different modules in SPOL, planning and accreditation.


**Past Goals** – 2017-18 Goals must be updated in Planning Module

**Future Goals** – 2019-20 objectives will be inputted in Planning Module

Below is a quick outline of the inputting process:

1. Log in to SPOL: <https://spol.imperial.edu> , it will redirect you to the IVC sign-on screen. Log in using IVC credentials as seen below (@imperial.edu not needed).



 **IMPERIAL VALLEY  
COLLEGE**

Upon logging in you will be redirected to:  
<https://ivc.strategicplanningonline.com/SPOLNET/CASAuth.aspx>

**Username**  
jose.carrillo

**Password**  
.....

Remember login (only if this is a private computer)

Login

Password Reset Tool

## Past Goals

- By default, you will be in the 2018-19 Planning year, so you need to go to 2017-18, click on my planning units, and continue clicking on the triangles until you find the 17-18 objectives as seen below:

The screenshot shows the Strategic Planning Online (SPOL) interface. At the top left, the version is v4.5.0.7 and the date is Tuesday, October 2, 2018. The user is Jose G Carrillo, Director of Institutional Research - Imperial Valley College. The planning year is set to 2017-2018. The navigation menu includes My SPOL, Planning, Budget, Assessment, Credentialing, Accreditation, Resources, Reports, Support, Admin, and Logout. The main content area shows a welcome message and five icons for Planning, Budgeting, Assessment, Credentialing, and Accreditation. Below this is a section for Planning: My Planning Units, which contains a table of planning units and objectives.

Planning Unit	Planning Unit Manager	Approval Status	View	
Institutional Research	Carrillo, Jose G	<span style="color: green;">●</span> <span style="color: green;">●</span>	View	
Objective ID	Objective Title	Approval Status	DOC	LNK
929	Enhance IR website to improve data availability	<span style="color: green;">●</span> <span style="color: green;">●</span>		
823	Have readily available and current data for stakeholders	<span style="color: green;">●</span> <span style="color: green;">●</span>		
983	Make three scorecard presentations to campus community	<span style="color: green;">●</span> <span style="color: green;">●</span>		
984	Request for Student Employment Funds to assist the Office of Institutional Research	<span style="color: green;">●</span> <span style="color: green;">●</span>		

3. Double click on each objective and update the areas shown with the arrows on the screenshot below. Include an update on the narrative of any information that you need to convey in regards to the task or objective. Make sure you update **all** tasks on every objective, and **all** objectives for the 2017-18 planning year. These objectives are the PAST objectives that were to be completed by June 30, 2018. If the objective was not completed, you can carry over an objective to the next year. Please provide a status update in the narrative.

**Objective Descriptors** + Add Edit Delete

Objective ID: 983      Status: In Progress      Objective Purpose: 3 Program Review  
 Office of Institutional Research will conduct three presentations to campus community to present the Scorecard findings

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**Planning Years**

Planning Year	Start Date	End Date
<input checked="" type="radio"/> 2017-2018	07/01/2017	06/30/2018

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**Planning Unit Goals** Select      **Resource Plans** Add/Edit      **Planning Priorities** Add/Edit

There are no records to display      There are no records to display      ● Accreditation Compliance

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**Institutional Goals** Add/Edit

2012-15 Educational Master Plan

● 1.2 Goal One - Institutional Mission and Effectiveness --> Use of Institutional Scorecard to drive planning

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**Tasks or Steps to Accomplish Objective** Add Edit Expand All

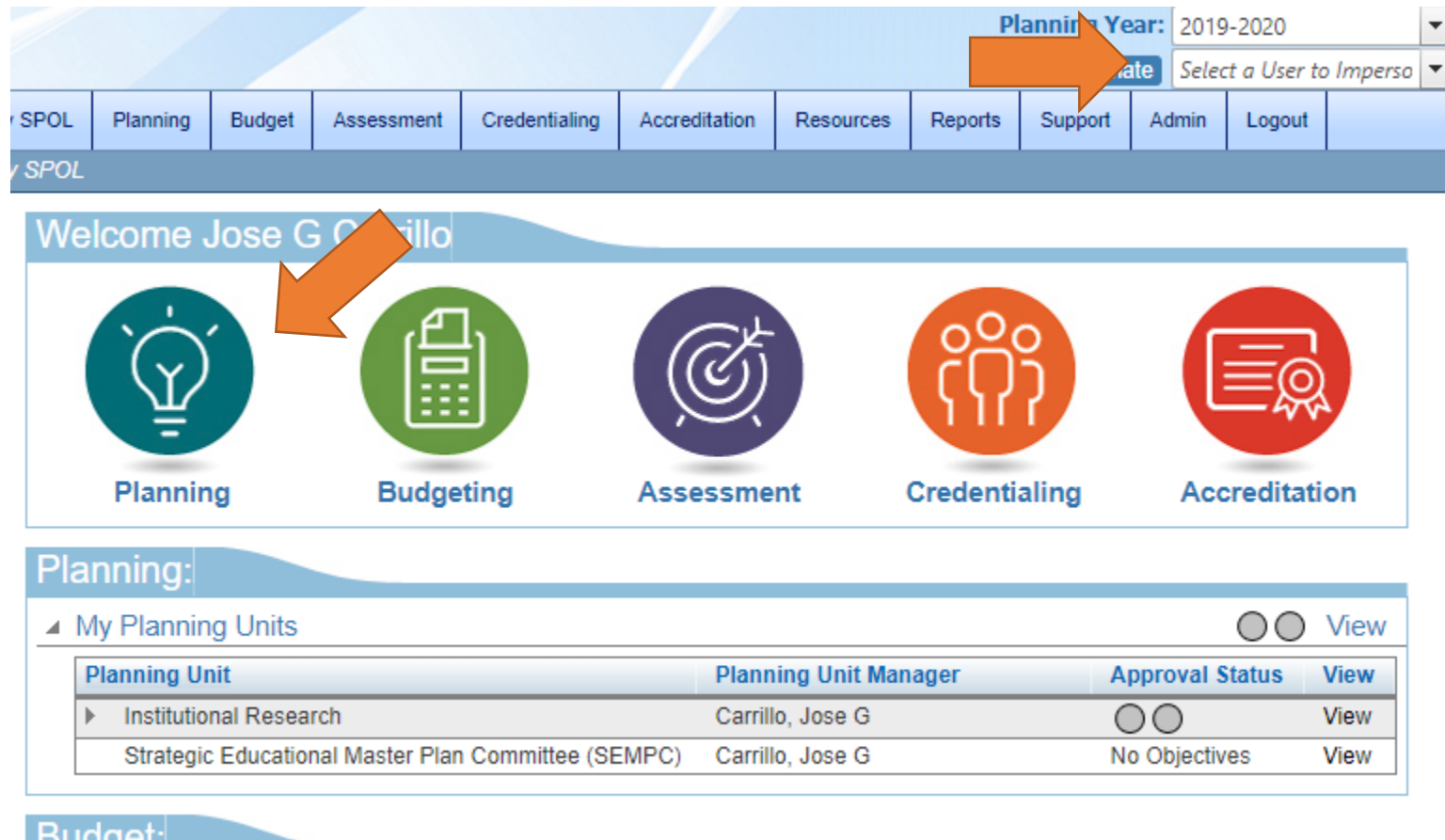
Make a powerpoint on latest scorecard figures

<b>Start Date:</b> 03/24/2017	<b>Type:</b> Qualitative	<b>Priority:</b> High	<b>Budget:</b> \$0
<b>Due Date:</b> 07/01/2017	<b>Completion Date:</b>	<b>Status:</b> In Progress	<b>More &gt;&gt;</b>

**Total Objective Budget: \$0**

## Future Goals

4. For Future Goals, change the planning year to 2019-20 in SPOL. Click on planning circle.



The screenshot shows the SPOL system interface. At the top right, the "Planning Year" dropdown is set to "2019-2020". Below the navigation bar, the user is welcomed as "Jose G Carrillo". A row of five circular icons represents different system functions: Planning (lightbulb), Budgeting (calculator), Assessment (target), Credentialing (people), and Accreditation (certificate). An orange arrow points to the Planning icon. Below this, the "Planning:" section is active, showing a table of "My Planning Units".

Planning Unit	Planning Unit Manager	Approval Status	View
▶ Institutional Research	Carrillo, Jose G	<input type="radio"/> <input type="radio"/>	View
Strategic Educational Master Plan Committee (SEMPC)	Carrillo, Jose G	No Objectives	View

5. Click on create new objective.

The screenshot shows the 'My SPOL > Planning' homepage. At the top is a navigation menu with links: My SPOL, Planning, Budget, Assessment, Credentialing, Accreditation, Resources, Reports, Support, Admin, and Logout. Below the menu is a breadcrumb trail 'My SPOL > Planning'. The main content area is titled 'Welcome to the Planning Homepage' and contains several interactive cards:

- View My Planning Units**: View all of your current Planning Units, or search for a specific Planning Unit and make your necessary updates.
- View My Objectives**: View all of your current objectives, or search for a specific Objective and make your necessary updates.
- Search for Objectives**: Search Objectives according to Planning Unit, Planning Year or Unit Manager.
- Create a New Objective**: Open up a blank Objective page and enter the relevant data to create a new Objective. (An orange arrow points to this card.)
- Copy Objective Data**: Copy objective data from one planning year to another.
- New Objective Wizard**: Follow our easy to use, step-by-step wizard to creating a new Objective.
- View All Planning Units**: View all Planning Units, or search for a specific Planning Unit and make your necessary updates.
- View All Objectives**: View all objectives, or search for a specific Objective and make your necessary updates.
- View Activity by Institutional Goal**: View all planning and assessment activity currently supporting your Institutional Goals.
- Document Repository**: Document Repository.
- Print a Report**: Bring up the reporting interface to generate an informative report in minutes.

6. These instructions also show how to transfer from paper template to SPOL. If you are not using paper template as a guide, complete the areas shown with the arrows below. If you are using paper, please refer to next page.

Enter objective title, select your planning unit/dept, chose 2019-20 for original planning year, select an objective purpose, select 3-Program Review as an objective purpose, choose Planning under Objective status, and describe your objective under the Objective Description area. Once you have finished click on the floppy/save icon to proceed to the new set of questions on creating tasks and measuring your objective.

The screenshot shows a web application interface for creating a new objective. At the top, there is a navigation menu with tabs: My SPOL, Planning, Budget, Assessment, Credentialing, Accreditation, Resources, Reports, Support, Admin, and Logout. Below the menu, the breadcrumb trail reads "My SPOL > Planning > Create a New Objective". The main heading is "Create a New Objective".

Fields and arrows:

- Objective ID:** <NEW>
- Objective Title:** A text input field containing "The title for my objective goes here". An orange arrow points to this field.
- ERP ID:** Create On Save
- Planning Unit:** A dropdown menu showing "15000 - Institutional Research --- Carrillo, Jose G". An orange arrow points to this dropdown.
- Original Planning Year:** A dropdown menu showing "2019-2020". An orange arrow points to this dropdown.
- Leave on "No":** Radio buttons for "Yes" and "No", with "No" selected.
- Objective Purpose:** A dropdown menu showing "3 Program Review". An orange arrow points to this dropdown.
- Objective Status:** A dropdown menu showing "Planning". An orange arrow points to this dropdown.
- Objective Description:** A text area with a rich text editor toolbar. The text inside reads "This is where I describe in detail what I plan to accomplish and why is needed". An orange arrow points to the text area.
- Format:** Radio buttons for "Plain Text" and "HTML", with "HTML" selected.
- Save:** A floppy disk icon in the top right corner with an orange arrow pointing to it.

If using paper template, see below:

The image displays a paper template for creating a 2019-20 program objective and a corresponding web application interface. Two large orange arrows indicate the mapping between the two.

**2019-20 PROGRAM OBJECTIVE(S) Template:**

- Identify 2019-20 FUTURE Objective(s):** Objective Description:
- Task(s)** one or more tasks to complete this objective/goal
- A.** Timeline/Target Date for Completion:
- B.** Timeline/Target Date for Completion:
- C.** Timeline/Target Date for Completion:
- How will this objective be measured?
- How will the completion of tasks identified above improve student/program success?
- Who are the responsible parties and assignees?
- Please fill the section below only if your objective requires a budget enhancement request – if you have more than one task requiring a resource request, please repeat the sections below.
- Identify Task:**
  - Facilities  Marketing  Technical  Professional Development  Staffing  Administrative
- Timeline/Target Date for Completion:**
- Expense Type (mark all that apply)**
  - One-Time  Recurring  Legally Mandated
- Funding Type**
  - General District  Categorical (Specify)
- Budget Request** \$

**INSTITUTIONAL GOAL(S) (Select 1 primary goal)**

- A) Student Success** (primary?)
  - A1  A4  A7
  - A2  A5
  - A3  A6
- B Teaching & Learning Effectiveness** (primary?)
  - B1  B3
  - B2
- C Access & Growth** (primary?)
  - C1  C2
- D Community, Econ & Workforce Dev.** (primary?)
  - D1  D2
- E Organizational Effectiveness** (primary?)
  - E1  E7
  - E2  E8
  - E3  E9
  - E4  E10
  - E5  E11
  - E6

**Create a New Objective Web Form:**

- Objective ID:** <NEW>
- Objective Title:** The title for my objective goes here
- Planning Unit:** 15000 - Institutional Research --- Carrillo, Jose G
- Original Planning Year:** 2019-2020
- Objective Purpose:** 3 Program Review
- Objective Status:** Planning
- Objective Description:** This is where I describe in detail what I plan to accomplish and why is needed

7. Leave Planning Unit Goals, Resource Plans, and Planning Priorities Blank. Select your institutional goal that best describes your activity, add a new task (see next page), and complete the measurements, intended results and associated accreditation standards. The associated accreditation standard ties your last comprehensive program review (program health or SWOT) to this year's objective. Please make sure you select the cycle were you last completed a comprehensive review for this section and the appropriate standard.

My SPOL > Planning > Create a New Objective > The title for my objective

### Objective Details

The title for my objective goes here

15000 - Institutional Research  
 Unit Manager: Carrillo, Jose G  
 Email Unit Manager: [Send Email](#)

Approval Notes:  Approval Status:    
 Note Options:  Approval Options:

**Objective Descriptors** [Add](#) [Edit](#) [Delete](#)

Objective ID: 1273 Status: Planning Objective Purpose: 3 Program Review  
 This is where I describe in detail what I plan to accomplish and why is needed

**Planning Years**

Planning Year	Start Date	End Date
2019-2020	07/01/2019	06/30/2020

**Planning Unit Goals** [Select](#) **Resource Plans** [Add/Edit](#) **Planning Priorities** [Add/Edit](#)

There are no records to display

**Institutional Goals** [Add/Edit](#)

There are no records to display

**Tasks or Steps to Accomplish Objective** [Add](#) [Edit](#) [Expand All](#)  
 Total Objective Budget: \$0

There are no records to display

**What Measurement Tools or Methodologies Will You Use for this Objective?** [Add](#) [Edit](#)

There are no records to display

**How Intended Results Improve Student Success or Program Effectiveness?** [Add](#) [Edit](#)

There are no records to display

**Associated Accreditation Standards or Other Standards** [Select](#) [Remove](#)

There are no records to display

**How will this objective be measured?**

**How will the completion of tasks identified improve work efficiency, reduce costs, or improve student success?**

**Who are the responsible party(ies) and assigned user(s)?**



8. Adding a task and/or budget enhancement request:

2017-18 PROGRAM OBJECTIVE #1
<b>Identify 2017-18 Objective(s):</b>
<b>Objective Description:</b>
<b>Task(s)</b> one or more tasks to complete this objective/goal
A.
<b>Timeline/Target Date for Completion:</b>
B.
<b>Timeline/Target Date for Completion:</b>
C.
<b>Timeline/Target Date for Completion:</b>
<b>How will this objective be measured?</b>
<b>How will the completion of tasks identified improve student/program success?</b>
<b>Who are the responsible parties and assigned user(s)?</b>

- a) Click on Add under the tasks/steps section
- b) the first date should be the start date and the end date should be the date due. For example if Fall 2019, is listed on the timeline, start will be August 1, 2019 with an end date of December 31, 2020.
- c) Choose High for priority level
- d) Under type, choose Qualitative/Qualitative for how the objective will be measured.
- e) Choose status of the objective from the dropdown menu. Most will be planning unless it is a multi-year objective
- f) You do not need to fill in completed date/order number.
- g) Click on Save.

9. If there is a budget enhancement tied to this task, you need to complete the following:

- a) Click on view budget
- b) Click on new
- c) Select budget account
- d) Select the GL code for corresponding request, if the GL code is not listed select new GL code, click next

Tasks or Steps to Accomplish Objective

Start Date: 11/10/2014    Type: Qualitative    Priority Level: Medium    Order: 4

Date Due: 11/18/2014    Completed Date:    Status: Incomplete    Budget: \$0

Description:  
hvjvhj

Remarks  
There are no records to display

View Budget    View Assignments    Save    Delete    Close

List Budget Items for this Task

Enhanced Budget Items

2015-2016

There is no enhanced budget data found for the following year.

New Enhanced Budget Non-Financial Item Detail

Budget Account  
Research Planning and Grants Admin. O General Inst Support Services

GL Code  
6590 - Capital Equipment DEP Asset (Forecast)

Next

- e) Under the Enhanced Budget forecast detail screen, select high for priority
- f) state the task on to description
- g) Select the commodity type from the Resource Committee that best describes your budget enhancement request
- h) Select if this a classroom related expense
- i) Select if this is a legal requirement
- j) Enter the cost of the expense under the proposed section
- k) Enter a justification if one is stated
- l) Click on save, then close, and close on the new window.

Note: The description and justification will be used to prioritize, budget enhancement request, please make sure these are thorough and well-written.

10. If you have supporting documentation to enter, click add on Documents with Supportive information. Click on the objective folder and select upload, choose your file and upload. Click on close.

11. When completed, go to the approval status options drop down menu and submit for approval.

12. If you have more objectives, go to my SPOL, planning, and create a new objective under the 2019-20 year.