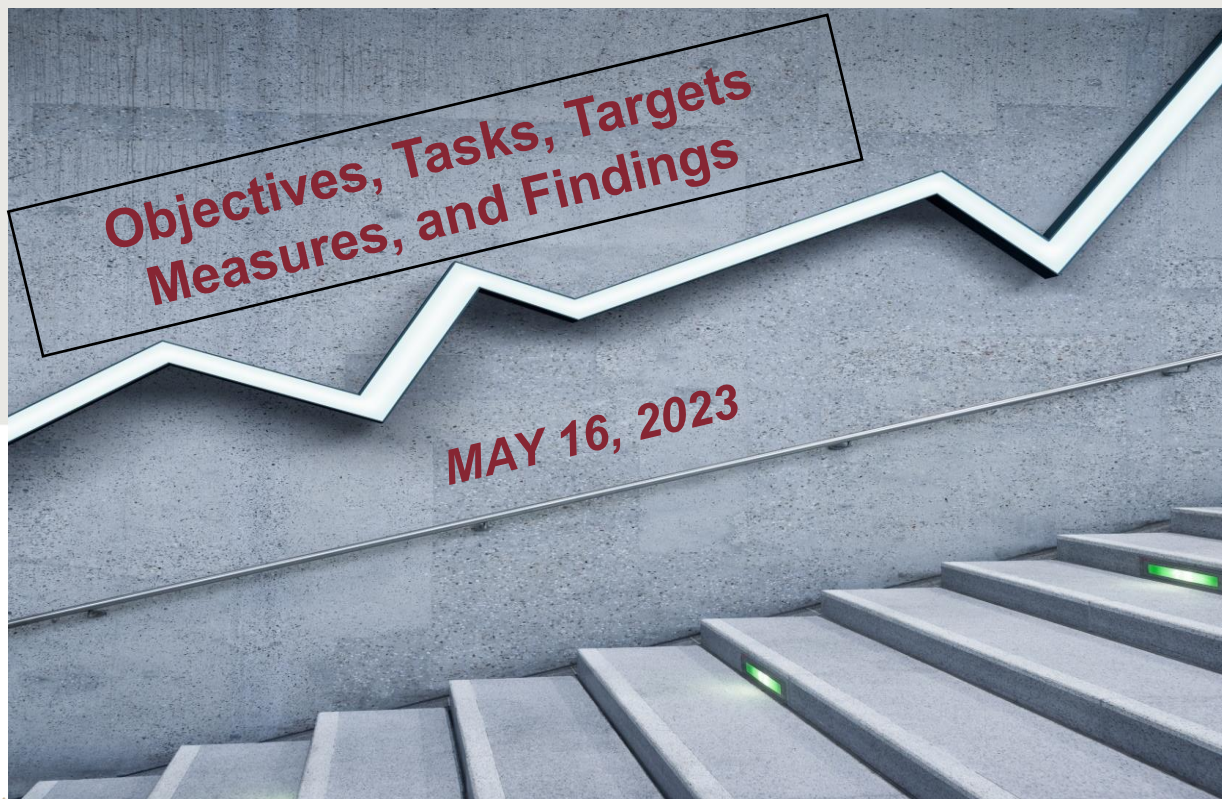


Planning in SPOL



WELCOME!

Presenters and Role:

Introduction –

Dr. Brittany Williams Goldstein: Chief of Staff / Vice President of Policy, Research, and Governance

SPOL Diamond – Features and Flow

*Dr. Gurvinder Khaneja – Director,
Office of Institutional Research*

SPOL – Process and Procedure

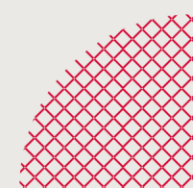
*Mr. Alec O’Shea – SPOL Representative
Ms. Jayme Kerr – SPOL Representative*

Please note – This session is being recorded to assist in the future.

TRAINING OBJECTIVES

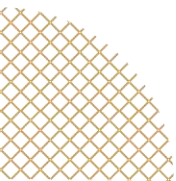
- *Strengthen understanding the relationship between Planning and Assessment.*
- *Learn how to populate excel templates with objectives, tasks, targets, measures, and findings in SPOL-Diamond.*
- *Understand functionality of newly designed SPOL-Diamond.*
- *Populating SPOL- Diamond with information from Excel template*

*Questions will be addressed at the end of the session.
You can post your questions through the chat.*



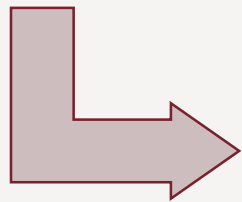
RCNJ

Boldly Ascending:
Unit Effectiveness
Planning as
Continuous Learning
and Improvement

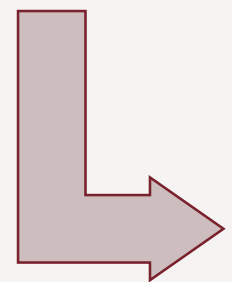


CONTINUOUS LEARNING AND IMPROVEMENT

Mission
Vision
Values



*Boldly
Ascending*

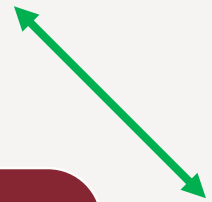


Unit
Effectiveness
Plans

- 3 Goals
- 13 Objectives



Key Performance Indicators



- Unit Purpose
- Unit Objectives
- Tasks
- Measures
- Targets
- Findings
- Use of Results

SAMPLE PLAN FEATURING 1 OBJECTIVE

BA Goal 3: Agile Stewardship

BA Objectives: 3a Institutional distinction, 3c Fiscal sustainability, 3d Organizational agility

Unit Objectives: Value-added institutional relationships with national membership organizations.

Tasks:

1. Audit of Institutional Memberships
2. Determine Membership Alignment
3. Cost Benefit Analyses of Memberships

Measure(s):

- a. Adaptive Insights YoY Institutional Memberships Report;
- b. Annual Member Liaison Reports (A5)

Target:

- a. Year over Year expense reduction in membership fees (direct);
- b. 60% of Annual Liaison Reports will report increased engagement with membership association for AY24; 75% for AY25 (indirect).


Findings: Partially met.

- a. From FY23-FY24, membership fee expenses decreased by 5% through a combination of fee negotiations and membership discontinuations.
- b. Forty percent of Annual Member Liaison Reports (N=45) reported increased engagement with membership associations for FY24 as verified by the Annual Member Liaison Reports.

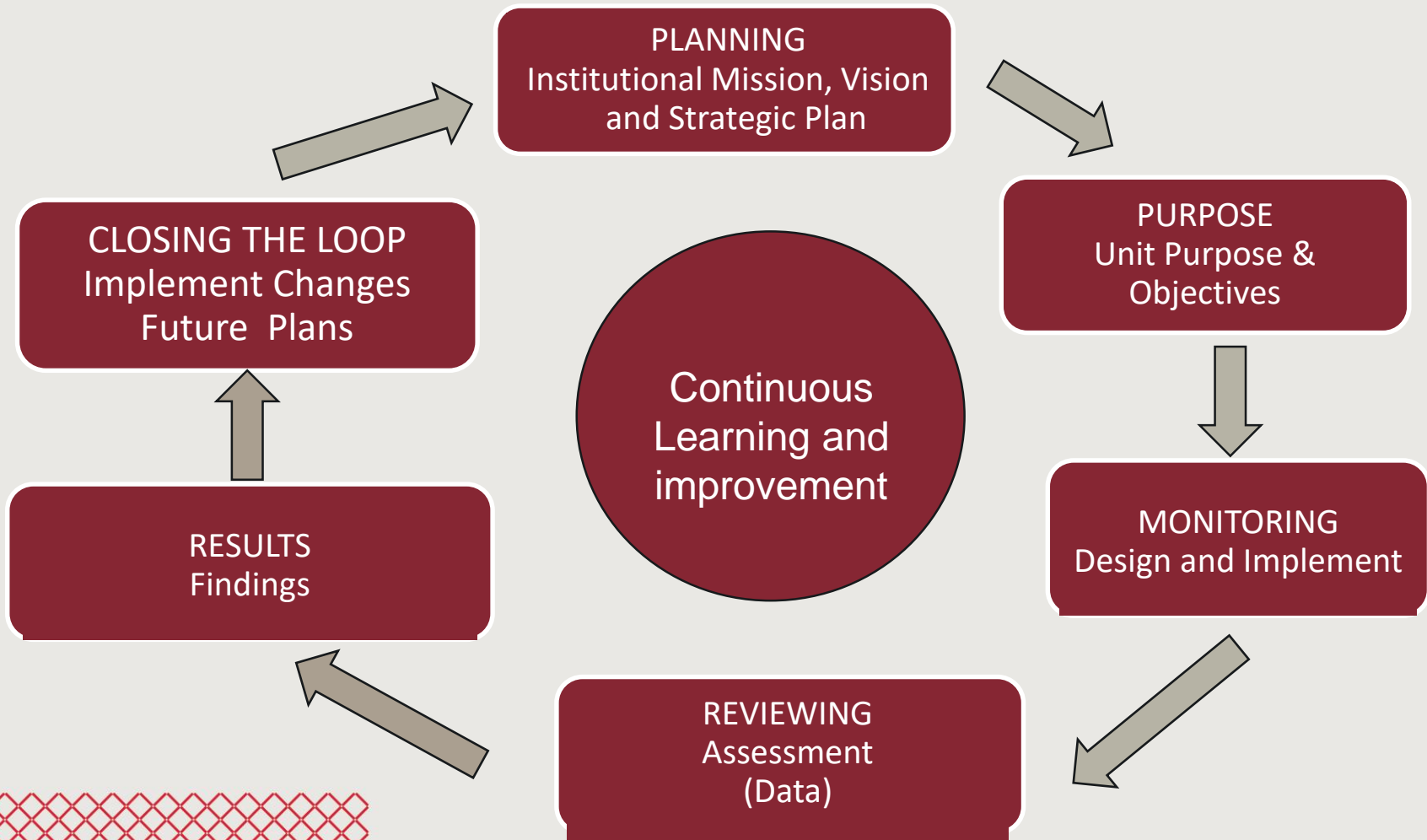
Use of Results:

- a. Greater expense reductions were realized through membership fee negotiations than through discontinuation. As a result of this, the College will more routinely seek to negotiate membership fees.
- b. Of the 60% (27) of Annual Member Liaison Reports (N=45) which did not report increased engagement with membership associations for FY24, the vast majority of the Reports also reported the association did not provide virtual engagement opportunities.

As a result, the Office of the President will 1) reconsider the target in light of current travel limitations, and 2) advance a “temporary suspension of membership” option to liaisons.



ORGANIZATIONAL EFFECTIVENESS



TYPES OF PLANNING AT AN INSTITUTION

Strategic Planning – Means/Process Oriented

Institutional Effectiveness Planning - Ends/Outcomes Oriented

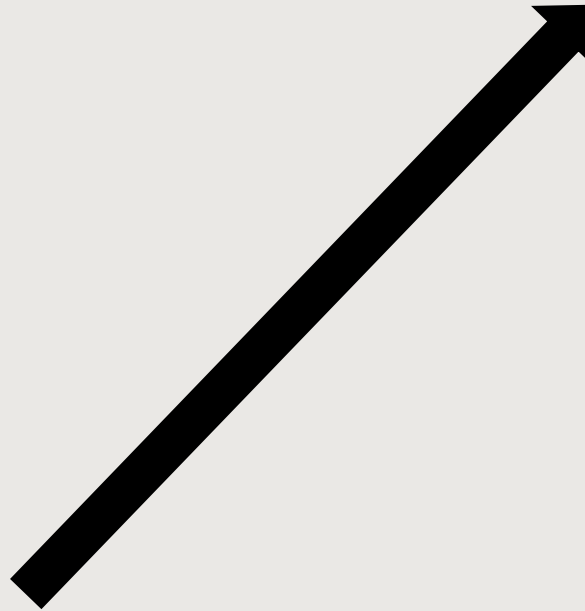
Institutional Mission



**Strategic Plan
(Goals and Objectives)**



**Unit Purpose
Statements**



Objective



Tasks



Measures



Target



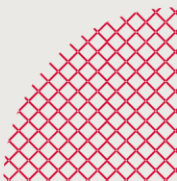
Results

PROCESS OF SELECTING UNIT OBJECTIVES

***START** by selecting 3 - 5 unit objectives:*

- *Consult with your unit/team manager or AAC representative.*
- *Strategic but not operational (demonstrating a new or adjusted endeavor).*
- *Ensure that the selected objective is linked to an objective in Boldly Ascending (Strategic Plan) and aligns with your unit purpose statement.*

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SPOL – Diamond TEMPLATE FOR SPOL

NEXT POPULATE EXCEL TEMPLATE - Information to be entered in SPOL

- *What is the need for a template?*
- *How does the template help?*
- *Let us review.*

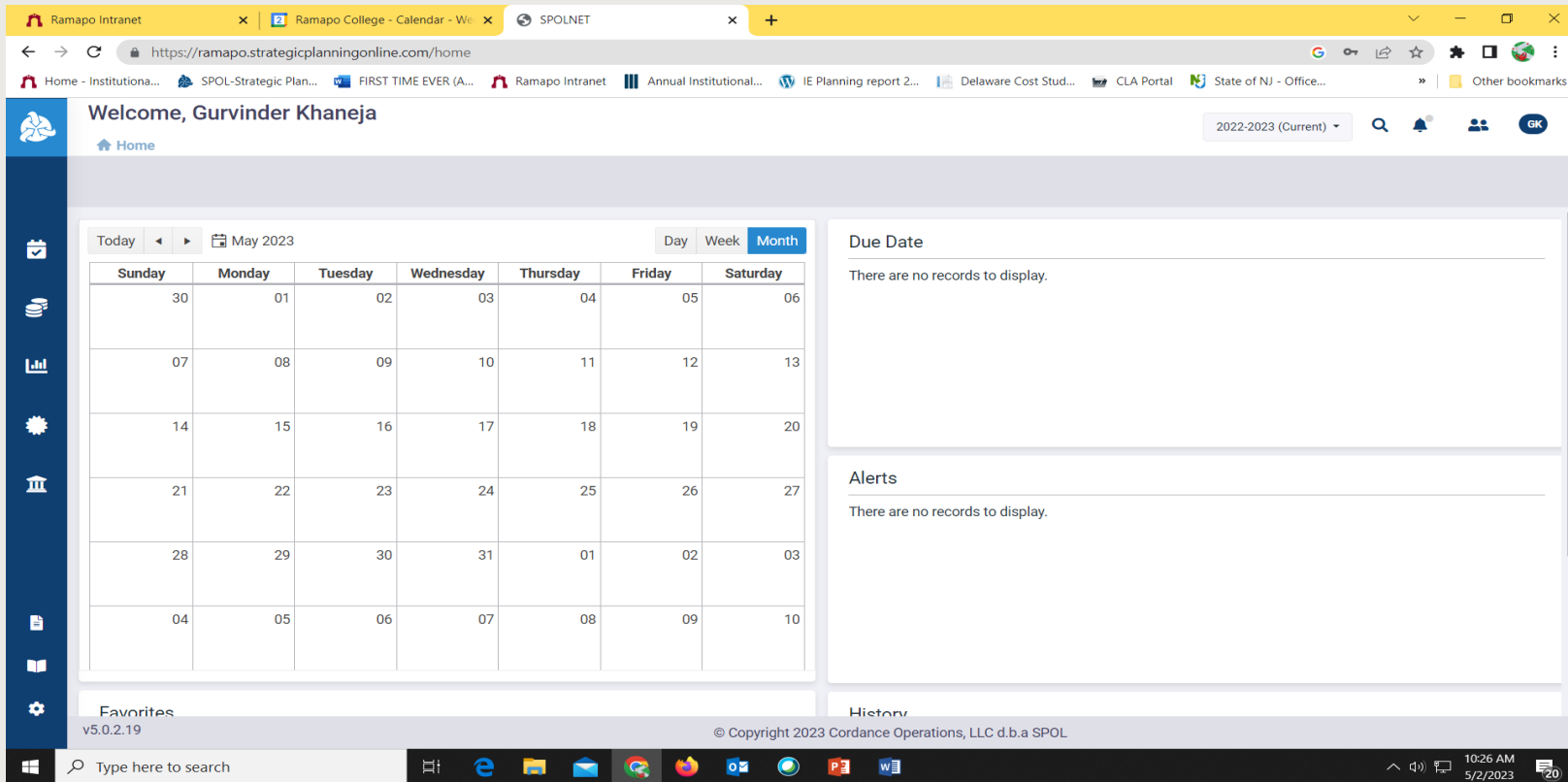
Ok! Let us start “SPOL-ING.”

SPOL Login:

<https://ramapo.strategicplanningonline.com>

Note - Remember to Bookmark the site.

SPOL – Diamond START HERE



The screenshot shows a web browser window with the URL <https://ramapo.strategicplanningonline.com/home>. The page title is "Welcome, Gurvinder Khaneja". The main content area features a calendar for May 2023, with tabs for "Day", "Week", and "Month". The calendar shows dates from 30 to 10. To the right of the calendar are two sections: "Due Date" and "Alerts", both containing the text "There are no records to display." Below the calendar is a "Favorites" section with the version number "v5.0.2.19". At the bottom of the page, there is a copyright notice: "© Copyright 2023 Cordance Operations, LLC d.b.a SPOL". The Windows taskbar is visible at the bottom of the screenshot, showing the time as 10:26 AM on 5/2/2023.

Select the first icon on the left hand pane and select your Planning unit, Such as, “Executive Core/Institutional Research.

YEAH! - The fun begins here!

SPOL – Diamond UNIT PURPOSE AND OBJECTIVES

*Click on your unit title, for example you can select
“**Executive Core/ Institutional Research.**”*

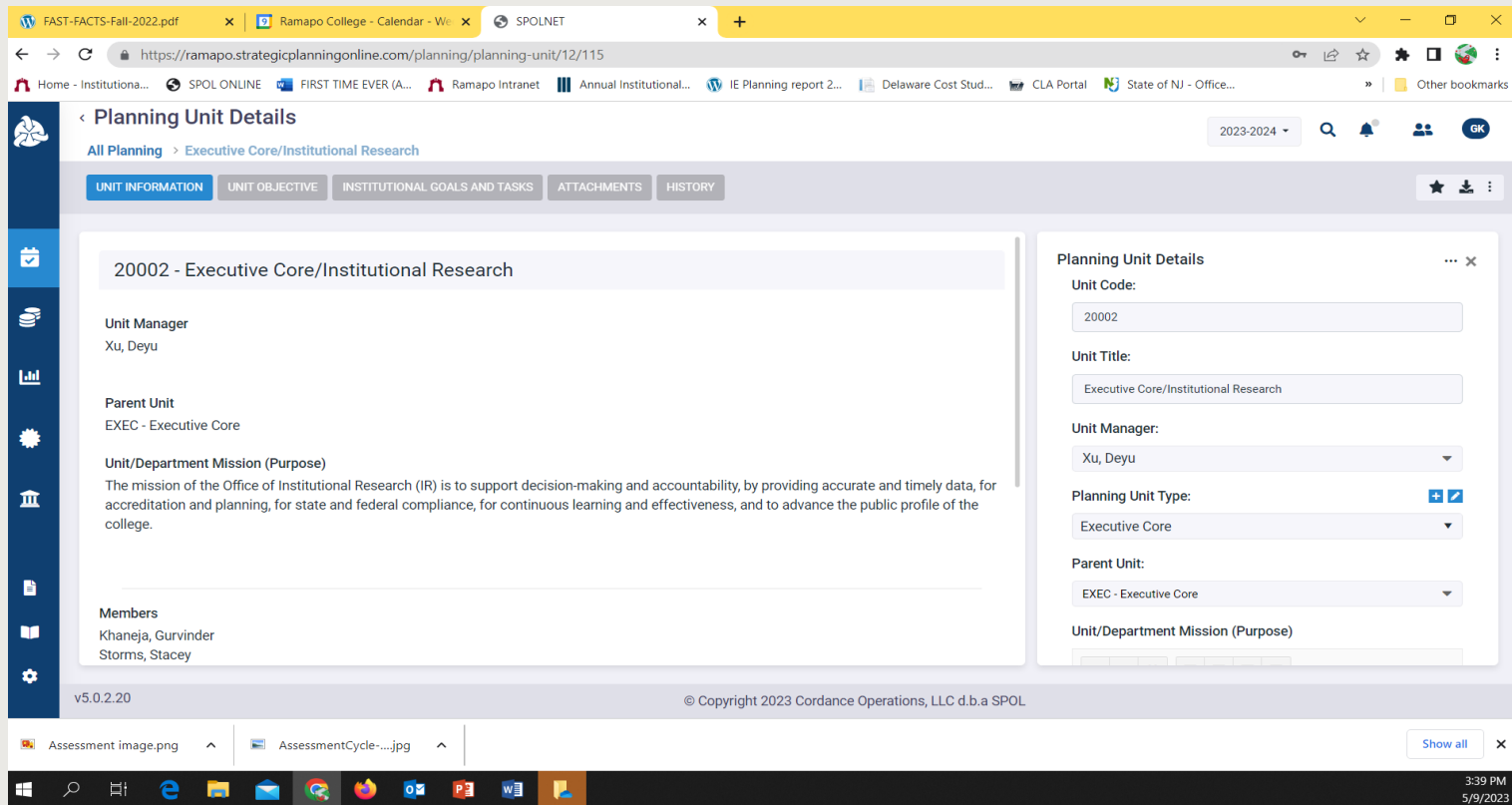
On this screen you are expected to:

- *Select the year 2023-24 on the top right.*
- *Enter your Unit Purpose*
- *Enter Unit Objectives*
- *Link to Strategic Plan Goals and Objectives*

AAC Members – Check that the names of all your CEC members are accurate per the list that was sent to you. If you need to add or delete any names, send an email to gkhaneja@Ramapo.edu

SPOL – Diamond UNIT MISSION

Select the Core/Unit and you see the following screen:



The screenshot shows a web browser window displaying the SPOL (Strategic Planning Online) interface. The browser tabs include 'FAST-FACTS-Fall-2022.pdf', 'Ramapo College - Calendar - We...', and 'SPOLNET'. The address bar shows the URL: <https://ramapo.strategicplanningonline.com/planning/planning-unit/12/115>. The page title is 'Planning Unit Details' and the breadcrumb trail is 'All Planning > Executive Core/Institutional Research'. The main content area is titled '20002 - Executive Core/Institutional Research' and contains the following information:

- Unit Manager:** Xu, Deyu
- Parent Unit:** EXEC - Executive Core
- Unit/Department Mission (Purpose):** The mission of the Office of Institutional Research (IR) is to support decision-making and accountability, by providing accurate and timely data, for accreditation and planning, for state and federal compliance, for continuous learning and effectiveness, and to advance the public profile of the college.
- Members:** Khaneja, Gurvinder; Storms, Stacey

On the right side, a 'Planning Unit Details' sidebar shows the following fields:

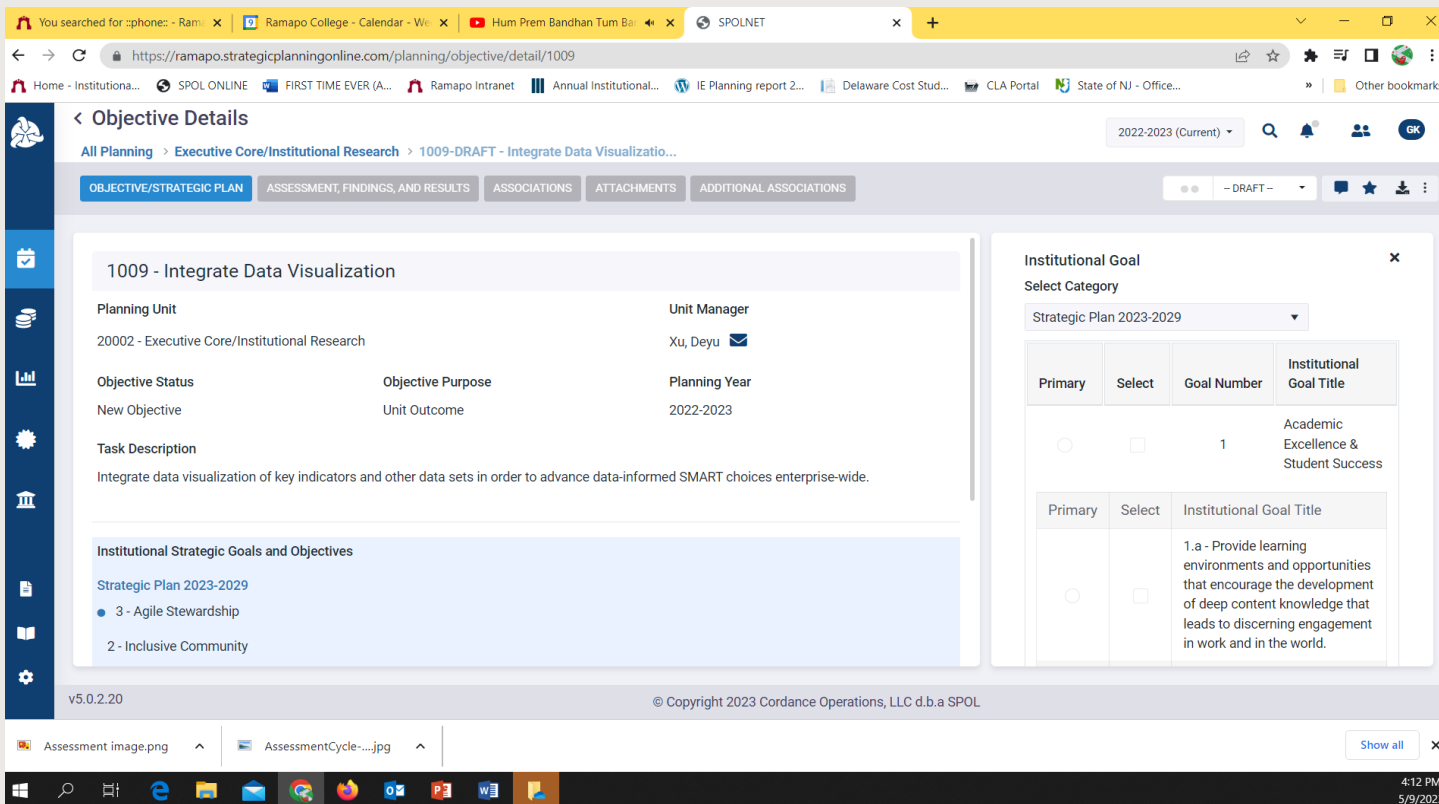
- Unit Code:** 20002
- Unit Title:** Executive Core/Institutional Research
- Unit Manager:** Xu, Deyu
- Planning Unit Type:** Executive Core
- Parent Unit:** EXEC - Executive Core
- Unit/Department Mission (Purpose):** (Empty field)

The footer of the page indicates the version is 'v5.0.2.20' and the copyright is '© Copyright 2023 Cordance Operations, LLC d.b.a SPOL'. The Windows taskbar at the bottom shows the time as 3:39 PM on 5/9/2023.

Alec and Jayme will demonstrate how to enter information here.

SPOL – Diamond LINKING UNIT OBJECTIVES TO STRATEGIC GOALS AND OBJECTIVES

If you have entered the unit objective, i.e. “Provide accurate and timely data for accreditation and planning.” Double click on unit objective and you reach the screen where you can link unit Objective to Strategic Goals and Objectives



The screenshot shows the SPOLNET web application interface. The browser address bar displays the URL: <https://ramapo.strategicplanningonline.com/planning/objective/detail/1009>. The page title is '< Objective Details'. The breadcrumb trail is 'All Planning > Executive Core/Institutional Research > 1009-DRAFT - Integrate Data Visualizatio...'. The page is in 'DRAFT' mode.

The main content area is titled '1009 - Integrate Data Visualization'. It includes the following information:

- Planning Unit:** 20002 - Executive Core/Institutional Research
- Unit Manager:** Xu, Deyu
- Objective Status:** New Objective
- Objective Purpose:** Unit Outcome
- Planning Year:** 2022-2023
- Task Description:** Integrate data visualization of key indicators and other data sets in order to advance data-informed SMART choices enterprise-wide.

Below the task description, there is a section for 'Institutional Strategic Goals and Objectives' with a list:

- Strategic Plan 2023-2029
 - 3 - Agile Stewardship
 - 2 - Inclusive Community

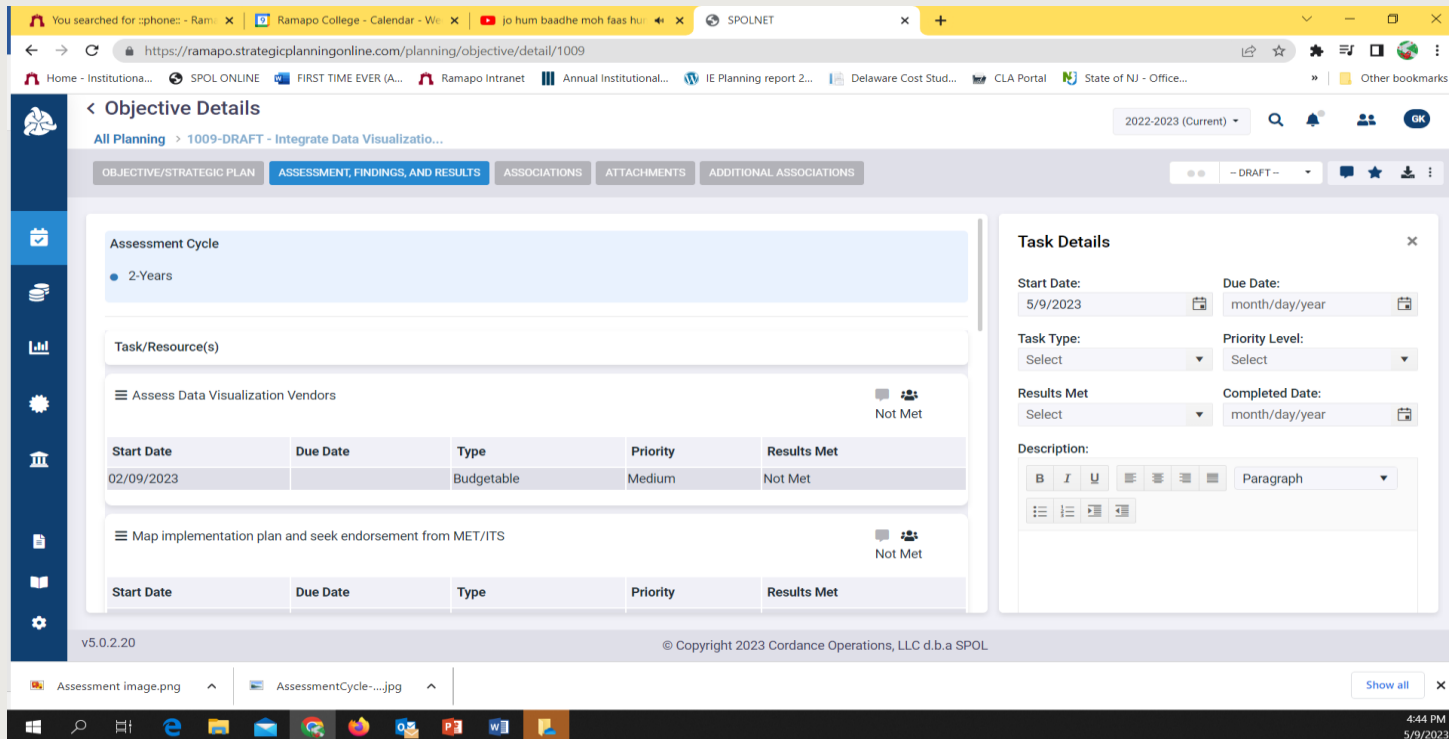
On the right side, there is a modal window titled 'Institutional Goal' with a close button. It has a 'Select Category' dropdown set to 'Strategic Plan 2023-2029'. Below this is a table with columns 'Primary', 'Select', 'Goal Number', and 'Institutional Goal Title'.

Primary	Select	Goal Number	Institutional Goal Title
<input type="radio"/>	<input type="checkbox"/>	1	Academic Excellence & Student Success
Primary	Select	Institutional Goal Title	
<input type="radio"/>	<input type="checkbox"/>	1.a - Provide learning environments and opportunities that encourage the development of deep content knowledge that leads to discerning engagement in work and in the world.	

At the bottom of the page, the version number 'v5.0.2.20' and copyright information '© Copyright 2023 Cordance Operations, LLC d.b.a SPOL' are visible. The Windows taskbar at the bottom shows the time as 4:12 PM on 5/9/2023.

SPOL – Diamond ASSESSMENT FINDINGS AND RESULTS

- The following tab allows you to enter*
- *Assessment Cycle*
 - *Tasks, Measures, Target and Resources*
 - *Results, Findings and Reflections for next cycle*



Objective Details
All Planning > 1009-DRAFT - Integrate Data Visualization...

OBJECTIVE/STRATEGIC PLAN | **ASSESSMENT, FINDINGS, AND RESULTS** | ASSOCIATIONS | ATTACHMENTS | ADDITIONAL ASSOCIATIONS

2022-2023 (Current) | Search | Notifications | Profile | GK

Assessment Cycle

- 2-Years

Task/Resource(s)

Assess Data Visualization Vendors Not Met

Start Date	Due Date	Type	Priority	Results Met
02/09/2023		Budgetable	Medium	Not Met

Map implementation plan and seek endorsement from MET/ITS Not Met

Start Date	Due Date	Type	Priority	Results Met

Task Details

Start Date: 5/9/2023 Due Date: month/day/year

Task Type: Select Priority Level: Select

Results Met: Select Completed Date: month/day/year

Description: Paragraph

v5.0.2.20 © Copyright 2023 Cordance Operations, LLC d.b.a SPOL

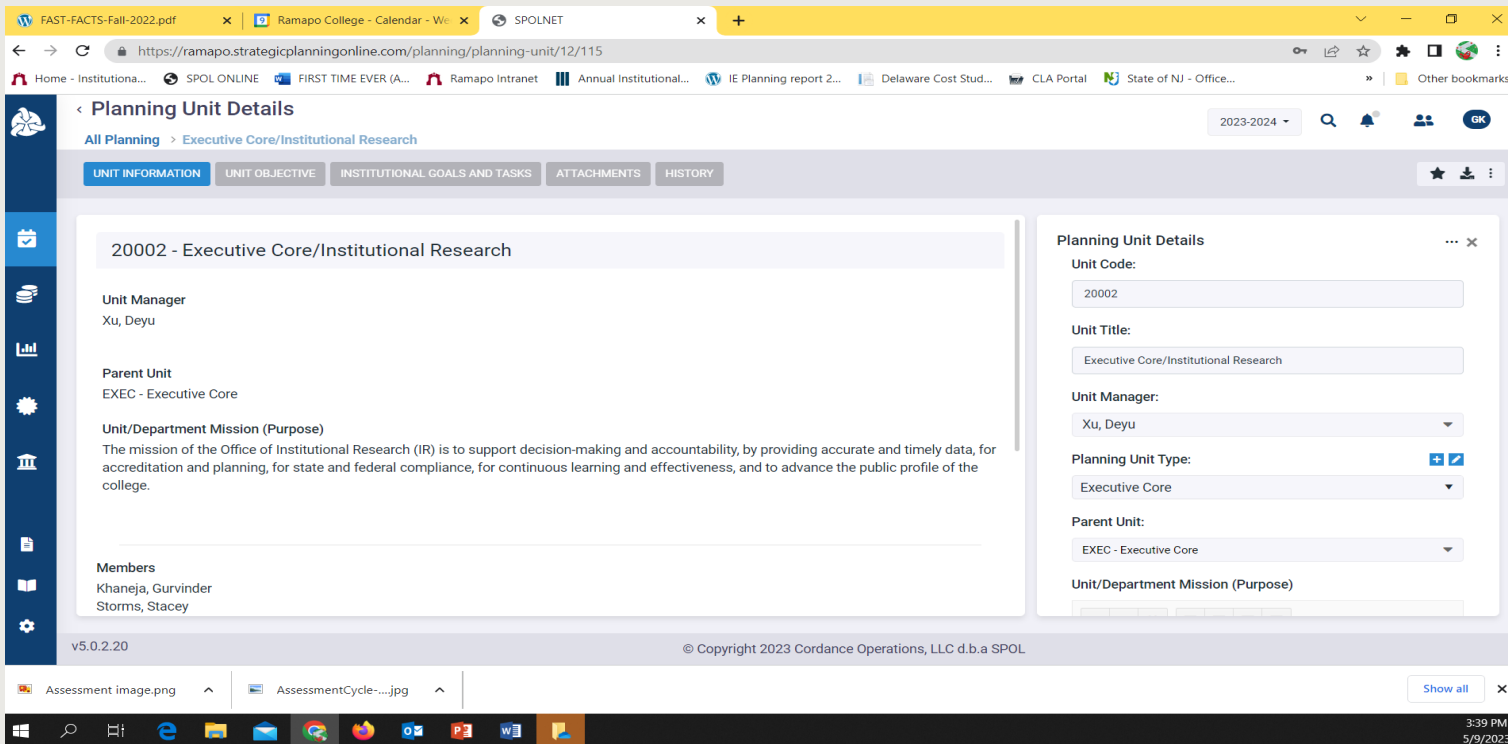
Assessment image.png | AssessmentCycle-...jpg | Show all

4:44 PM 5/9/2023

SPOL – Diamond HELPFUL TABS

The other tabs on the screen are

- *Associations*
- *Attachments (Evidence)*
- *Additional Associations*



The screenshot displays the SPOLNET web application interface. The browser address bar shows the URL: <https://ramapo.strategicplanningonline.com/planning/planning-unit/12/115>. The page title is "Planning Unit Details". The main content area is divided into two columns. The left column, titled "UNIT INFORMATION", contains the following details: Unit Code: 20002 - Executive Core/Institutional Research; Unit Manager: Xu, Deyu; Parent Unit: EXEC - Executive Core; and Unit/Department Mission (Purpose): The mission of the Office of Institutional Research (IR) is to support decision-making and accountability, by providing accurate and timely data, for accreditation and planning, for state and federal compliance, for continuous learning and effectiveness, and to advance the public profile of the college. The right column, titled "Planning Unit Details", contains a form with the following fields: Unit Code: 20002; Unit Title: Executive Core/Institutional Research; Unit Manager: Xu, Deyu; Planning Unit Type: Executive Core; Parent Unit: EXEC - Executive Core; and Unit/Department Mission (Purpose). The bottom of the page shows the version number "v5.0.2.20" and the copyright notice "© Copyright 2023 Cordance Operations, LLC d.b.a SPOL". The Windows taskbar at the bottom indicates the time is 3:39 PM on 5/9/2023.

SPOL – Diamond RESOURCES

Questions ????

For help Email: rcnj-ir@ramapo.edu

*Materials Regarding SPOL Training are available on the
Administrative Assessment Committee (AAC) website:*

<https://www.ramapo.edu/assessment-committee/>

Next Meeting – Thursday May 18th @ 2.30 pm.

Bring your questions – simple or complex and we will answer!

THANK YOU!

