Creating Objectives in SPOL

This tutorial guides you step-by-step through the process of creating planning objectives. As you complete your program review, or during your year off from program review, you may come up with ideas that might improve your program. These ideas need to be defined as **objectives** (<u>what</u> you hope to accomplish) and then broken down into **action plans**, or tasks (steps for <u>how</u> the idea will be accomplished). You can assign people to work on action plans and you can request resources (people, money, things) to complete an action plan.

<u>Creating Objectives</u>

1. Log into SPOL
2. From the My SPOL landing page, click on the **Planning** module.
3. From the Planning Homepage, you have two options: **View My Objectives**, or **New Objective Wizard**. The wizard is nice but you will end up being prompted for information that Cañada is not using. So to keep things easier, click on **View My Objectives**. You'll end up on a page listing "My Objectives for Planning Year 20xx".
4. Click on the blue **New Objective** button located on the right side of the page.
5. You will begin describing your objective by entering a variety of critical details.
    - **Objective Title** - A short description of the Objective.
    - **Planning Unit** - Select your department from the pull-down menu.
    - **Original Planning Year** - By default the current year is already selected.
    - **Multi-Year Objective** - This choice indicates the life span of an Objective.
        - **No** (Single-Year Objective) - Indicates an Objective that requires one year to complete or begins and ends within a single academic year. Items such as supplies and equipment requests, subscriptions and memberships that go through an annual funding cycle are single-year objectives. You are applying for funding for this year.
        - **Yes** (Multi-Year Objective) - Indicates an Objective that requires multiple years to complete (begins and ends over multiple academic years). Projects that will take multiple years to complete should select this option.
    - **Objective Purpose** - Select the primary purpose for which the Objective has been created from the dropdown menu. **Program Improvement Plan** is typically the best choice. **Program Resource Request** is used if your objective is solely to purchase stuff (supplies, equipment, memberships, subscriptions). **Program Personnel Request** could be used if want to state your intention to propose a new faculty/staff position during the annual new position process. **College Planning Objectives** are created by committees and college-wide plans.
    - **Objective Status** - Select the current status of your Objective from the dropdown menu. **New Objective** would be the best choice. In future years, for Multi-year objectives, you can return to this page and indicate how much progress you've made: Planning/Discussion (25% complete), Implementation (50%), Ongoing Implementation (75%), Institutionalization (100%), Deferred or Discontinued.
    - **Objective Description** - This is the place to write a full description of your Objective. What would you like to accomplish? What information from program review suggests this would be a good direction to head? Note: If this is a Resource Request for supplies/equipment, just state that is so. You will enter more specific information and justification later.
6. Click the blue "disk" icon in the upper right to save your work.
7. You should know see the resulting **Objective Details** page so that you can check to be sure the information you entered up till now is correct. At this point you have a couple of options:
    A. You can identify other people on campus who will be impacted by, or involved with, your objective. You can notify them through SPOL that you need their help.
    B. You can create **Action Plans** and identify **Resources Required**. The latter is where you actually ask for "stuff" and money!

A. <u>Notifying people who are affected by, or will assist with, your plans</u>

1. Scroll to the **Impacted Units** section and click the blue **Select** button.
2. Click the option to view **All Planning Units** and wait for list to display.

3. Select the check box for the programs/departments that will be impacted.
4. You can write them a brief note by clicking the yellow note icon.
5. You can enter a date to contact them or just leave it at the default.
6. Click the blue "disk" icon to save your work.

B. Creating Action Plans

"Action plans" are a list of tasks that need to be accomplished in order to accomplish an objective. You can assign people to complete action plans; you can request resources (people, money, things) that are needed to complete an action plan.

1. Scroll to the **Action Plans & Resources Required** section and click the blue **Add** button.
2. You will begin describing your action plan by entering a variety of critical details.
   - **Type** - Select the type of action plan from the pull-down menu. If this is a plan to accomplish something, then **Department Action Plan** is the best choice
   - **Priority** - Select a priority from the pull-down menu
   - **End Date** - You may leave the end date and completed date blank for now.
   - **Status** - Select the current status of your action plan from the dropdown menu. **New** would be the best choice. In future years, for Multi-year objectives, you can return to this page and indicate how much progress you've made.
   - **Describe the Action Plan** - Write an explanation of the task that is be accomplished. If you are simply asking to purchase "stuff" (supplies, equipment, subscriptions, memberships), just write this. You'll provide detailed purchasing information and justification later.
3. Click the blue **Save** button.

C. Adding Resource Requests to an Action Plan

1. Click on the blue **Resources Required** button located in the bottom left of the **Action Plan & Resources Required** widow.
2. Click the blue **New** button on the upper right to begin adding budget requests.
3. Identify your **Program** from the pull-down menu and the **type of resource** you are requesting. Resources should be tangible items that can be funded. Non-tangible requests, such as scheduling, are not meant to be included as resource requests.
   - **Facilities**: Includes requests for new facilities or facility improvements. Examples of facility requests include: program space needs, new flooring, or replacement of large equipment.
   - **Contract Services**: Includes requests for independent contractors or service vendors beyond what the program/department current budget can cover. Equipment: Items with a single unit cost greater than $5,000. Examples of equipment requests include: x-ray machine, batting cages). If equipment will require additional resources (power, removal of existing equipment, etc.) please provide these details in your request.
   - **Supplies**: Includes new items with a single unit cost less than $5,000 that are not currently budgeted by the program/department.
   - **Subscriptions and memberships**: Includes subscriptions for resources, materials, or services. Membership requests can only be for institutional memberships and must follow district guidelines. Individual memberships are not allowed.
   - **Professional Development**: Includes requests for professional development funds that are not currently budgeted by the program/department.
   - **Instructional Personnel**: Includes requests for new instructional personnel
   - **Non-instructional Personnel**: Includes requests for non-instructional personnel
   - **Information Technology (IT)**: Includes requests for new IT equipment (computer, laptop, printer, and scanner). Replacement of existing IT equipment does not need to be submitted as a resource request. Please work with IT directly for replacement items.
   - **Other**: Includes items not covered by all other resource request categories. Please check with the budget office prior to using this category.
4. Complete the **Resources Required** window. Provide the most detail possible as this helps the prioritization process go more quickly and smoothly.

- **Priority**: Indicate level of priority (Low, Medium, and High). The level of priority should reflect need related to the program's goals and objectives. For example, a high priority would indicate something 'mission critical'. Medium priority indicates something is important, and low priority would indicate something that is more of a 'want' than a 'need'.
- **Item Name**: The item name should reasonably identify what the item is. Please do not use item numbers (eg., "Student Microscope" should be used instead of "40X-1000X")
- **New/Repair/Replacement**: Indicate if the request is for a new item, repair of an existing item, or replacement of an existing item. For new items, please indicate in the description if the purchase is a one-time expense or on-going. For repair and replacement items, please indicate when the existing item was purchased. For replacement items, keep in mind 'replacement' means the new item would be consistent with the previous item (not 'more, bigger or better').
- **Taxes Included**: Indicate if the request amount includes taxes
- **Shipping Included**: Indicate if the request amount includes shipping costs
- **Number needed**: Indicate the number of items requested
- **Unit price**: Indicate unit price. A unit price must be included for the request to be considered. Please make every effort to get an accurate price for items requested. The exceptions for this requirement are for the following request categories: IT and Facilities. For these requests, please enter an amount of $1. The budget office will work with the IT and Facilities departments to obtain quotes.
- **Total cost**: This amount will be calculated automatically based on the number of items needed and unit price.
- **Description of item**: Please describe the individual resource requested and indicate if the expense is one-time or on-going. Also include how the request supports the mission of the college, strategic goals, and/or program mission. If applicable, explain the relationship of the resource recommendation to Learning Outcomes and overall institutional effectiveness. If there are safety/liability concerns, legal, or accreditation mandates related to the request, please indicate this information and provide any supporting documentation. Whenever possible, please include actual ordering information including vendor and catalog number.

5. Click the blue **Save** button in the lower right.
6. Continue adding resource requests until finished. Then click **Save** and **Close.**