

A Guide for Annual Planning and Reporting for **Academic** units

UNIVERSITY OF WEST FLORIDA

OFFICE OF INSTITUTIONAL EFFECTIVENESS

Revised June 2022

What is the Purpose?

- ▶ In support of the University of West Florida mission and Strategic Plan 2022-2027, all units engage in annual planning.
- ▶ The act of annual planning allows units to be **proactive** in looking ahead to at what the **goals** of the university are and how best to **allocate resources** (time, people, budget) to achieve those goals.
- ▶ Completion of the Annual Plan and Annual Report document allows the University to gather evidence of this university-wide process.
- ▶ This Guide is designed to help you best describe the efforts of your unit as it relates to moving the University's strategic plan forward.
- ▶ Your thoughtful work in this process is important!

The Annual Plan/Report form is a spreadsheet

- ▶ Starting with fiscal year 2019-2020, the annual plan/report form will now be completed on a **spreadsheet**.
- ▶ Starting with fiscal year 2021-2022, the annual plan/report form will now be completed in a **Google sheet**. This template is provided to your unit. All changes are automatically saved to the sheet.

Changes to the Annual Plan/Report form

- ▶ New Features include:
 - ▶ Space for **multiple goals** on the same form
 - ▶ **Drop-down lists** for UWF Strategic Directions
 - ▶ Sections for each part of the Strategic Plan are included.
 - ▶ If possible, try to have **at least one goal for each section**. However this is NOT a requirement.
 - ▶ **Facilitates better reporting** of university efforts to accomplish Strategic Plan 2022-2027.

Where do I find the Annual Plan/Report form?

- ▶ Go to <https://uwf.edu/academic-affairs/departments/institutional-effectiveness/>
- ▶ In the upper left navigation, click on **Annual Planning and Reporting**

Institutional Effectiveness



In this section

Annual Planning and Reporting	+
SLO/Assessment Forms	+
Assessment Awards and Recognition	+
Faculty Resources	+
Accreditation	+
Fifth Year Report to SACSCOC	+
College/Department Resources	+
About Us	+
Institutional Effectiveness Resources	+
Academic Degree Programs	+

Where do I find the Annual Plan/Report form? (cont.)

- ▶ From the expanded list, click on **Academic Unit Reporting**

Overview of Annual Planning and Reporting

UWF engages in mission-driven and data-informed planning, assessment, and improvement processes at all levels and sites and through all modalities. Annually, we review our mission, goals, and outcomes, and use of results to develop actionable plans for seeking improvement in the coming year.

Planning units (i.e., academic, administrative, and support units and departments) work with supervisors and division leads to set goals and objectives, and determine measures which are appropriate for determining achievement of goals and objectives in any given cycle. While divisions may set division-wide strategic plans, units at every level of the institution set goals and priorities that support the [UWF Strategic Plan 2017-2022](#) and the university [mission](#).

In this section

[Annual Planning and Reporting](#) —

[Overview](#)

[Guidance for Completing Annual Plans & Reports](#)

[Academic Unit Reporting](#)

[Administrative & Support Unit Reporting](#)

[Schedule of Reporting Dates](#)

[BOG Accountability](#)

[SLO/Assessment Forms](#) +

Where do I find the Annual Plan/Report form? (cont.)

- ▶ On this page you will see a list of reporting units organized by division.
- ▶ Locate your division and click on **your unit name**.

To Complete your Unit's Annual Reports for 2019-2020:

1. Select your **Division** below (i.e., CEPS, Finance & Admin, etc.)
2. Select your **department** or **unit** from the list (i.e. Argo Central, Controller's Office, etc.)
3. Click on the link for the appropriate folder:

Annual Report

Annual Report - Complete last 2 cols of Last Year's sheet for the Annual Report

Annual Plan - Complete the first 5 cols of the sheet for the Current Year Annual Plan

Community Engagement - Contains sheet for last year to complete of last year's activities

Distinctive & Notable - Contains a doc for last year to complete of last year's activities

4. All files are **Google** sheets or **Google** docs, so changes are automatically saved.

College of Arts, Social Sciences, & Humanities

[Anthropology](#)
[Archaeology Institute](#)
[Art](#)
[CASSH Dean's Office](#)
[Communication](#)
[English](#)
[FRAM](#)
[Government](#)
[History](#)

College of Education & Professional Studies

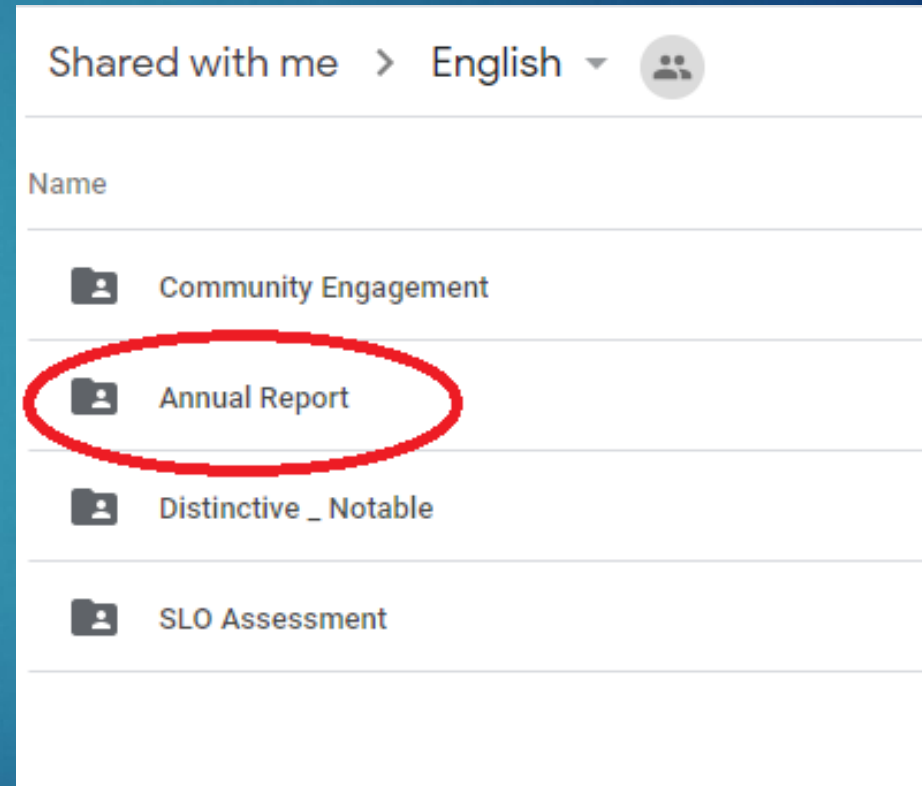
[Administration & Law](#)
[Aerospace Studies](#)
[CEPS Dean](#)
[Criminology & Criminal Justice](#)
[Educational Research & Administration](#)
[Instructional Design](#)
[Technology](#)
[Military Science](#)

College of Business

[Accounting & Finance](#)
[COB Dean](#)
[Department of Business Administration](#)
[Department of Commerce](#)
[Florida Small Business Development Center at UWF](#)
[Marketing & Economics](#)
[MBA Program](#)

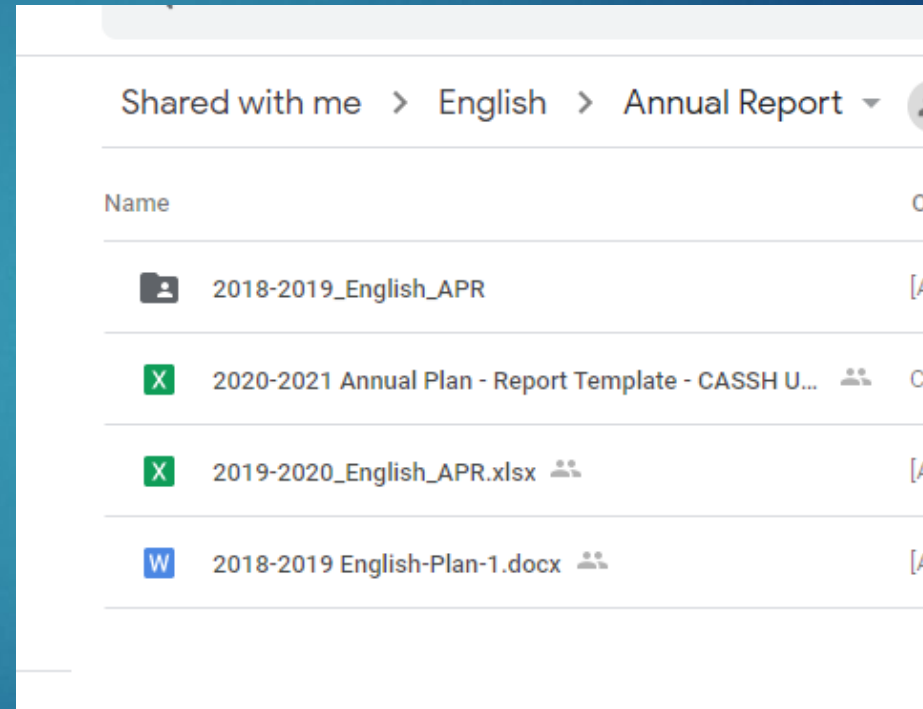
Where do I find the Annual Plan/Report form? (cont.)

- ▶ As long as you are **logged in with your UWF credentials**, you will be taken to a Google file structure titled **IE Reporting**
- ▶ You will find 4 folders
 - ▶ **Distinctive & Notable**
 - ▶ **Community Engagement**
 - ▶ **Annual Report**
 - ▶ **SLO Assessment**
- ▶ Select the **Annual Report** folder



Where do I find the Annual Plan/Report form? (cont.)

- ▶ In the folder you will see files named according to year to include:
 - ▶ 2020-2021
 - ▶ 2019-2020
 - ▶ Any prior years
- ▶ Select the file for the Annual Plan/Report year you are completing.



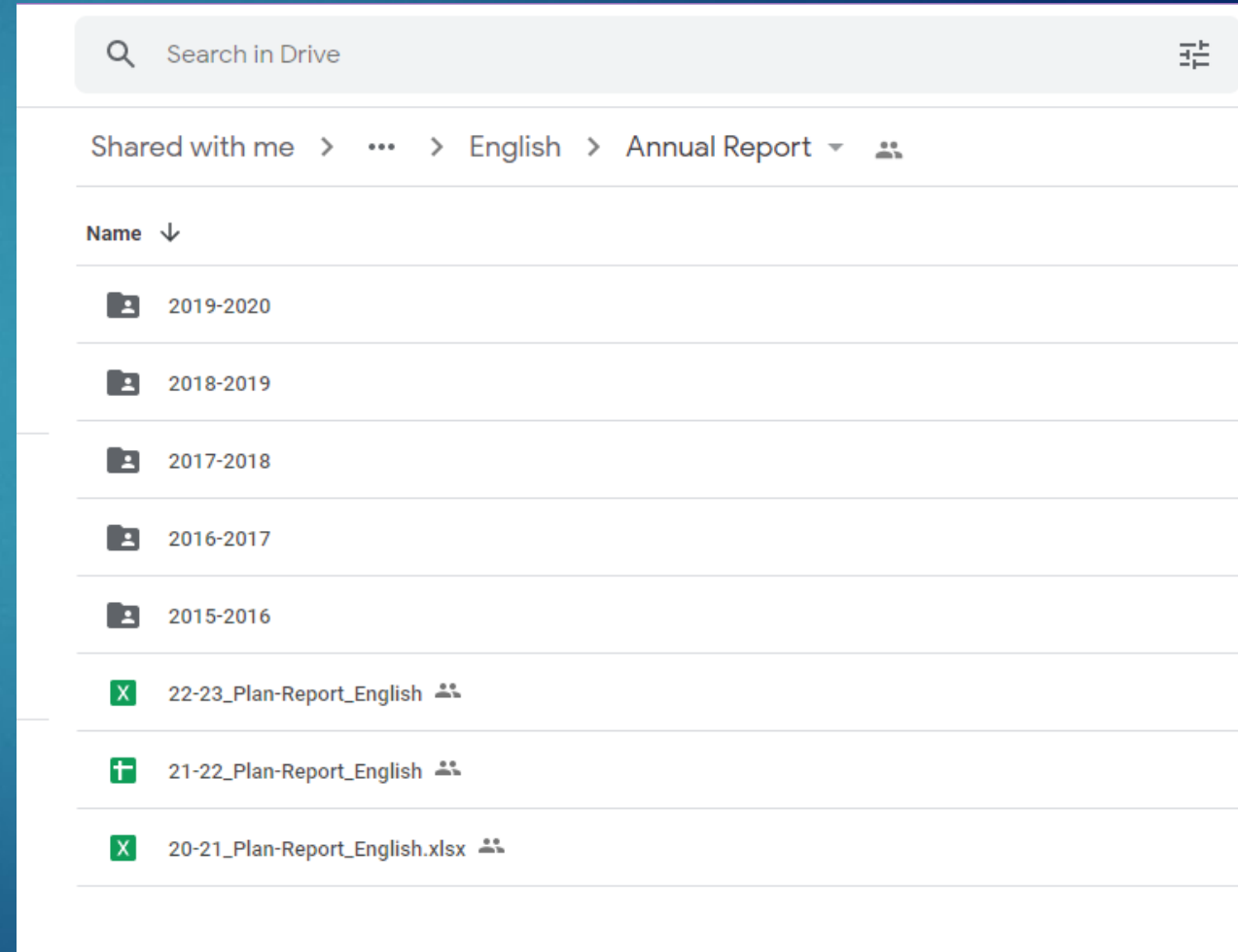


The Report

COMPLETED REPORT OF *CURRENT OR PRIOR* ACADEMIC YEAR

What do I do with the Annual Plan/Report form?

- ▶ In the folder you will see files named according to year.
- ▶ Select the file for the Annual Report year you are completing.
- ▶ In this case, we are working on the Annual **Report** for last academic year select the previous year report



Completing the Annual Report

- ▶ The form will open to the Instructions tab in Google. You may find it helpful to read the instructions.
- ▶ You can open the report in **Google** Sheets, or download the form and open it in **Excel**.
- ▶ *If you decide to download and edit into **Excel**, you will need to **save and reupload** the file.*
- ▶ When you are ready to proceed, click on the **Annual Plan-Report tab** at the bottom of the window.

The screenshot shows a Google Sheets spreadsheet with the following content:

Instructions for Completing the Annual Plan - Annual Report	
1	General Notes to Completion Guide of this Form: Annual Plans are <i>living</i> documents that reflect a thoughtful process of what a unit wants to achieve in a given year and can be modified as necessary throughout the year as priorities shape activities.
2	Annual Reports are an update of an Annual Plan that reflect the accomplishments of the year. The PLAN portion of the table is Cols. A - E and should be completed and reviewed with your supervisor at the beginning of the fiscal/academic year. The REPORT portion of the document is Cols. F-G and reflects the achievement or progress toward the goal and potential implementation. The Report is completed and discussed with supervisor at the end of the fiscal/academic year.
3	Identification Information: Complete fields in Col A Rows 2-6 as appropriate to include: Dept/Unit Name, Dept/Unit Lead, Reporting Unit Name, Supervisor Name and Division.
4	Goal/Indicator: This is a broad goal or activity that your department or office will be engaged in for the coming year. Example: "Support the University in the development of programs of strategic emphasis."
5	UWF Strategic Direction: Select the strategic direction that best fits the goal or indicator. This is a drop-down list. Even though your goal or indicator may map to more than one strategic direction, select the best fit for this field.
6	Division Strategic Direction: Select the division strategic direction that best fits the goal or indicator. This is a drop-down list. Even though your goal or indicator may map to more than one strategic direction, select the best fit for this field.
7	Expected Outcome: Each goal/indicator should have at least one expected outcome, but you may have multiple. Number them sequentially. Example: "1. Develop new Master's degree in International Affairs."
8	Assessment Instrument(s): Each expected outcome should have at least 1 assessment instrument, but may have multiple. Number them sequentially. Example: "1. Internal and CAVP Preproposal documents prepared. 2. CCRs approved. 3. RTO document approved."
9	Result(s): Each expected outcome should have a result based on the assessment instruments. Example: "1. Internal and CAVP Preproposals signed. CAVP approved in November. 2. CCRs approved by Faculty Senate in December. 3. RTO presented to BOT in Feb/Mar. Forwarded to BOG for final approval."
10	Use of Results: Each expected outcome should have a Use of Results. Example: "New Master's degree in International Affairs to be implemented next academic year pending approval by BOG."


Completing the Annual Report (cont.)

- ▶ You filled in the top portion at the beginning of the fiscal year. Edit the following fields as necessary:
 - ▶ Dept/Unit Name
 - ▶ Dept/Unit Lead (Name of chair of dean, etc.)
 - ▶ Reporting Unit (the unit above yours on the Org Chart)
 - ▶ Supervisor (Name of your Reporting Unit Lead)
 - ▶ Division (select from a drop-down list)
- ▶ See example

Planning Year:	2021-2022
Dept/Unit Name:	English
Dept/Unit Lead:	Department Chair
Reporting Unit:	CASSH Dean
Supervisor:	Dean Brown
Division:	Academic Affairs


Completing the Annual Report (cont.)

- ▶ The remainder of the form is divided into 2 portions:
 - ▶ The **Plan** (Cols. A-D/E) and
 - ▶ The **Report** (Cols. E-F/F-G)
- ▶ Report on the progress toward each goal.
- ▶ Important note: Things come up during the year such as projects, legislations, major events (COVID-19 or hurricanes) that impact our plans.
- ▶ **IT IS OK TO EDIT YOUR PLAN TO ADD NEW GOALS THAT YOU MADE DURING THE YEAR.**

A		B		C		D		E		F		G	
Planning Year:		2021-2022		 UNIVERSITY of WEST FLORIDA									
Dept/Unit Name:		English											
Dept/Unit Lead:		Chair											
Reporting Unit:		CASSH Dean											
Supervisor:		Steve Brown											
Division:		CASSH											
PLAN PORTION								REPORT PORTION					
Goal/Indicator	UWF Strategic Direction	Division Strategic Direction	Tasks/Expected Outcome(s)	Method/Documentation	Result(s)	Use of Results							
EX. 1. Support the University in the development of programs of strategic emphasis.	3.1 Build programs of distinction that enhance UWF's reputation for educational excellence.	3.3 Identify and strategically invest in programs of distinction that enhance the academic mission.	1. Develop new Master's degree in International Affairs.	1. Preproposal documents. 2. CCRs 3. Request to Offer a New Program document.	1. Preproposal documents signed and approved by Provost and CAVP. 2. CCRs approved by Faculty Senate in December. 3. RTO approved by BOT in Feb/Mar.	1. New Master's degree in International Affairs forwarded to BOG for approval. Will begin admitting students next academic year.							
Strategic Direction 1: Learner Centered and Focused													
Strategic Direction 2: Personnel Investment and Engagement													
Strategic Direction 3: Academic Programming, Scholarship and Research													

Example 1

- ▶ The dept. identified 2 tasks for Goal 1.
- ▶ Progress or completion is reported in the **Results** column (Col. E)
 - ▶ Revised 8 semester plans were made available.
 - ▶ Annual course schedules were developed.
- ▶ Next steps are reported in the **Use of Results** column (Col. F)
 - ▶ Will review 8 semester plan in 2 years.
 - ▶ Will review annual course offerings and adjust annual schedule as required.

Planning Year: 2021-2022 Dept/Unit Name: English Dept/Unit Lead: Chair Reporting Unit: CASSH Dean Supervisor: Steve Brown Division: CASSH						
PLAN PORTION				REPORT PORTION		
Goal/Indicator	UWF Strategic Direction	Division Strategic Direction	Tasks/Expected Outcome(s)	Method/Documentation	Result(s)	Use of Results
EX. 1. Support the University in the development of programs of strategic emphasis.	3.1 Build programs of distinction that enhance UWF's reputation for educational excellence.	3.3 Identify and strategically invest in programs of distinction that enhance the academic mission.	1. Develop new Master's degree in International Affairs.	1. Preproposal documents. 2. CCRs 3. Request to Offer a New Program document.	1. Preproposal documents signed and approved by Provost and CAVP. 2. CCRs approved by Faculty Senate in December. 3. RTO approved by BOT in Feb/Mar.	1. New Master's degree in International Affairs forwarded to BOG for approval. Will begin admitting students next academic year.
Strategic Direction 1: Learner Centered and Focused						
Support the UWF goal to increase the 4 year graduation rate to 25% by 2025	1.2 Align resources to deliver exceptional support services and learning opportunities that will ensure students have access, continuity, and success while earning degrees.	4. Position the College as a leader in setting and achieving UWF's strategic goals.	1.1 Worked with faculty to review the 8 semester to ensure students can complete in 4 years. 1.2 Develop a yearly proposed schedule of course offerings to support the 8 semester plan to ensure the dept offers the courses students need to graduate on time.	Revised or updated 8 semester plan for each UG program in the department. Proposed annual schedule of course offerings by semester	Revised the 8 semester plan. Made the 8 semester plan available through the catalog, the dept. website. Also made available through CASSH Advisors. Developed an annual schedule of course offerings by semester.	Will review 8 semester plan in 2 years Will review annual course offerings and make necessary changes to annual schedule as required.
Strategic Direction 2: Personnel Investment and Engagement						

Example 2

- ▶ The dept. identified 1 task for Goal 2.
- ▶ Progress or completion is reported in the **Results** column (Col. E)
 - ▶ Gave status of each item in Col. D and added 1 new result.
- ▶ Next steps are reported in the **Use of Results** column (Col. F)
 - ▶ 2 next steps identified before implementation of new degree program. Both listed in Col. F.

PLAN PORTION				REPORT PORTION	
UWF Strategic Direction	Division Strategic Direction	Tasks/Expected Outcome(s)	Method/Documentation	Result(s)	Use of Results
3.1 Build programs of distinction that enhance UWF's reputation for educational excellence.	3.3 Identify and strategically invest in programs of distinction that enhance the academic mission.	1. Develop new Master's degree in International Affairs.	1. Preproposal documents. 2. CCRs 3. Request to Offer a New Program document.	1. Preproposal documents signed and approved by Provost and CAVP. 2. CCRs approved by Faculty Senate in December. 3. RTO approved by BOT in Feb/Mar.	1. New Master's degree in International Affairs forwarded to BOG for approval. Will begin admitting students next academic year.



The Plan

PLAN FOR THE **CURRENT OR COMING** ACADEMIC YEAR

What do I do with the Annual Plan/Report form?

- ▶ The **Annual Plan** is a reflection of what your unit will do in the upcoming fiscal year.
- ▶ The form will open to the Instructions tab. You may find it helpful to read the instructions.
- ▶ You can open the report in **Google Sheets**, or download the form and open it in **Excel**.
- ▶ *If you decide to download and edit into **Excel**, you will need to **save and reupload** the file.*
- ▶ When you are ready to proceed, click on the **Annual Plan-Report** tab at the bottom of the window.

The screenshot shows a Google Sheets spreadsheet titled "2019-2020_English_APR" with a menu bar (File, Edit, View, Insert, Format, Data, Tools, Help) and a toolbar (Print, Zoom, View only). The spreadsheet content includes the following instructions:

- General Notes to Completion Guide of this Form:**
 - Annual Plans** are living documents that reflect a thoughtful process of what a unit wants to achieve in a given year and can be modified as necessary throughout the year as priorities shape activities.
 - Annual Reports** are an update of an Annual Plan that reflect the accomplishments of the year. The **PLAN** portion of the table is Cols. A - E and should be completed and reviewed with your supervisor at the beginning of the fiscal/academic year. The **REPORT** portion of the document is Cols. F-G and reflects the achievement or progress toward the goal and potential implementation. The Report is discussed with supervisor at the end of the fiscal/academic year.
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- Use of Results:** Each expected outcome should have a Use of Results. Example: "New Master's degree in International Affairs to be implemented next academic year pending approval by BOG."

At the bottom of the window, the "Annual Plan-Report" tab is highlighted with a red circle.

What do I do with the Annual Plan/Report form? (cont.)

- ▶ Complete the top portion as follows:
 - ▶ Dept/Unit Name
 - ▶ Dept/Unit Lead (Name of chair of dean, etc.)
 - ▶ Reporting Unit (the unit above yours on the Org Chart)
 - ▶ Supervisor (Name of your Reporting Unit Lead)
 - ▶ Division (select from a drop-down list)
- ▶ See example

Planning Year:	2021-2022
Dept/Unit Name:	English
Dept/Unit Lead:	Department Chair
Reporting Unit:	CASSH Dean
Supervisor:	Dean Brown
Division:	Academic Affairs

What do I do with the Annual Plan/Report form? (cont.)

- ▶ The remainder of the form is divided into 2 portions:
 - ▶ The Plan (Cols. A-D) and
 - ▶ The Report (Cols. E/F)
- ▶ Let's review the types of goals you may want to include.

The Plan

The Report

PLAN PORTION				REPORT PORTION	
Goal/Indicator	UWF Strategic Direction	Tasks/Expected Outcome(s)	Method/Documentation	Result(s)	Use of Results
EX. 1. Support the University in the development of programs of strategic emphasis.	3.2 Further enhance strategies that promote opportunities for learners to engage in research and participate in service activities with faculty.	1. Develop new Master's degree in International Affairs.	1. Preproposal documents. 2. CCRs 3. Request to Offer a New Program document.	1. Preproposal documents signed and approved by Provost and CAVP. 2. CCRs approved by Faculty Senate in December. 3. RTO approved by BOT in Feb/Mar.	1. New Master's degree forwarded to BOG for approval. Will begin admitting students next academic year.

Things to Remember for the Annual Plan

- ▶ Please develop a plan that reflects the activities of your department/unit for the coming fiscal year.
- ▶ Most of your goals will be **Process-related** or **Satisfaction-related**, however you may have a few that are true Student Learning related.
- ▶ Each Goal (3-8 overall) should:
 - ▶ Be measurable (Col. A)
 - ▶ Be tied to at least 1 UWF Strategic Direction (Col. B)
 - ▶ Have at least 1 identified task or outcome (Col. C)
 - ▶ Have 1 or more items of documentation (Col. D)
- ▶ Everything you type in the Google spreadsheet is automatically saved.

Who do I contact with questions?

- ▶ Please contact your Office of Institutional Effectiveness with ANY questions! **Set up a time and we can go over your report and assist you with filling these out!!!**

We can be reached at:

- ▶ Angela Bryan, Director
850-473-7234
abryan@uwf.edu
- ▶ Carolyn Beamer, Asst. Director
850-474-2239
cbeamer@uwf.edu