

# A Guide for Annual Planning and Reporting for **Non-Academic** units

UNIVERSITY OF WEST FLORIDA

OFFICE OF INSTITUTIONAL EFFECTIVENESS

June 2022 revised

# 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 how the **goals of the unit support the university goals** as well as plan how best to **allocate unit 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.

# The Annual Plan/Report form

- ▶ 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**



The screenshot shows the 'Institutional Effectiveness' website. On the left is a photograph of a stone sign for the University of West Florida. On the right is a navigation menu with the following items:

- 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 +

The 'Annual Planning and Reporting' link is circled in red.



# Where do I find the Annual Plan/Report form?

- ▶ From the expanded list, click on **Administrative & Support 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**.

## **Academic Affairs**

[Academic Technology Center](#)  
[Argo Central](#)  
[Center for Behavior Analysis](#)  
[Center for Cybersecurity](#)  
[Center for Research & Economic Opportunity](#)  
[Complete Florida](#)  
[Continuing Education](#)  
[CUTLA](#)  
[Economic Development & Engagement](#)  
[Emerald Coast](#)  
[Enrollment Management & Services](#)  
[Financial Aid & Scholarships](#)  
[Florida Small Business Development Center](#)  
[FLVC](#)  
[Global Online](#)  
[Graduate School](#)  
[Innovation Institute](#)  
[Institutional Effectiveness](#)  
[Institutional Research](#)  
[ITS](#)

## **Academic Engagement & Student Affairs**

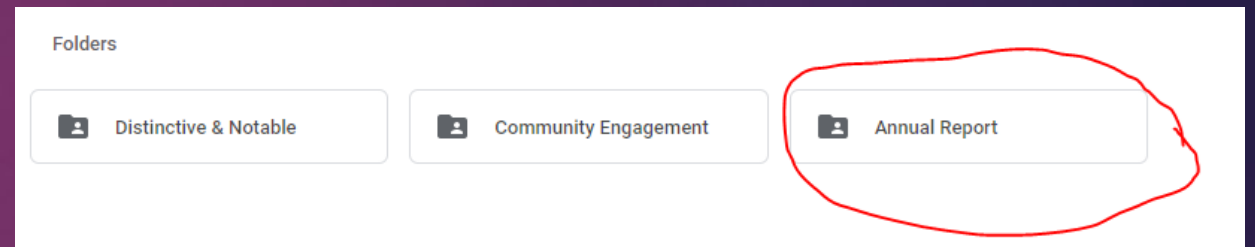
[Academic Engagement](#)  
[Career Development & Community Engagement](#)  
[Career Education](#)  
[Center for Academic Success](#)  
[Center for Asian Studies](#)  
[Community & Employer Engagement](#)  
[Counseling & Health Services](#)  
[Dean of Students](#)  
[Diversity Programs](#)  
[Educational Research Center for Child Development](#)  
[Equal Opportunity Programs](#)  
[First & Second Year Experience](#)  
[First Year Advising](#)  
[High Impact Practices & Experiential Learning](#)  
[Housing & Residence Life](#)  
[Intensive English](#)  
[International Affairs](#)  
[International Programs](#)

## **Finance & Administration**

[Building & Grounds Management](#)  
[Business & Auxiliary Services](#)  
[Controllers Office](#)  
[Environmental Health & Safety](#)  
[Facilities Maintenance](#)  
[Facilities Management](#)  
[Facilities Planning, Construction, & Space Management](#)  
[Office of VP for Finance & Administration](#)  
[Procurement & Contracts](#)  
[University Police Department](#)  
[Utilities, Energy, & Environmental Sustainability](#)

# Where do I find the Annual Plan/Report form?

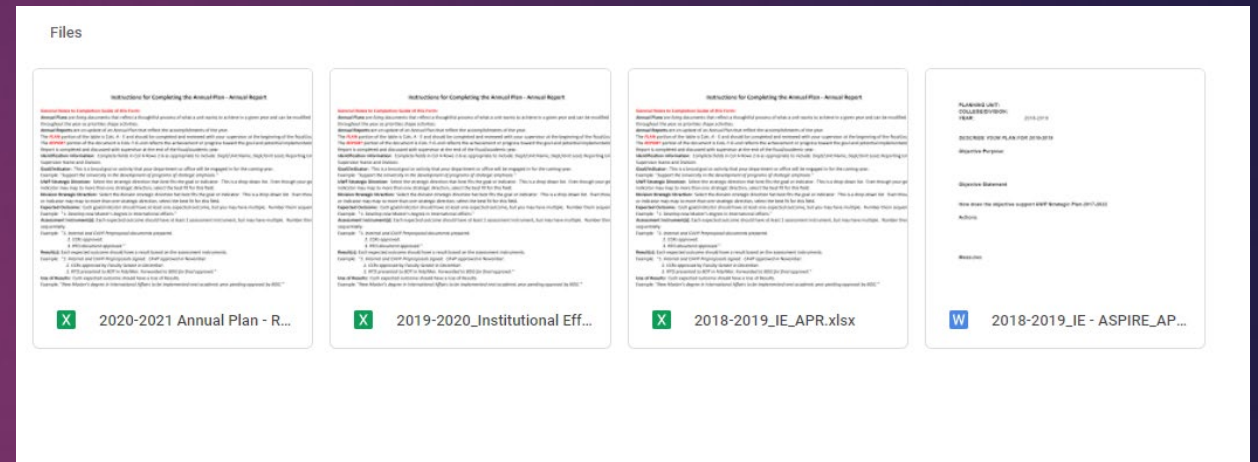
- ▶ As long as you are **logged in with your UWF credentials**, you will be taken to a Google file structure titled **IE Reporting**
- ▶ You will find 3 folders
  - ▶ **Distinctive & Notable**
  - ▶ **Community Engagement**
  - ▶ **Annual Report**
- ▶ Select the **Annual Report** folder





# Where do I find the Annual Plan/Report form?

- ▶ 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.



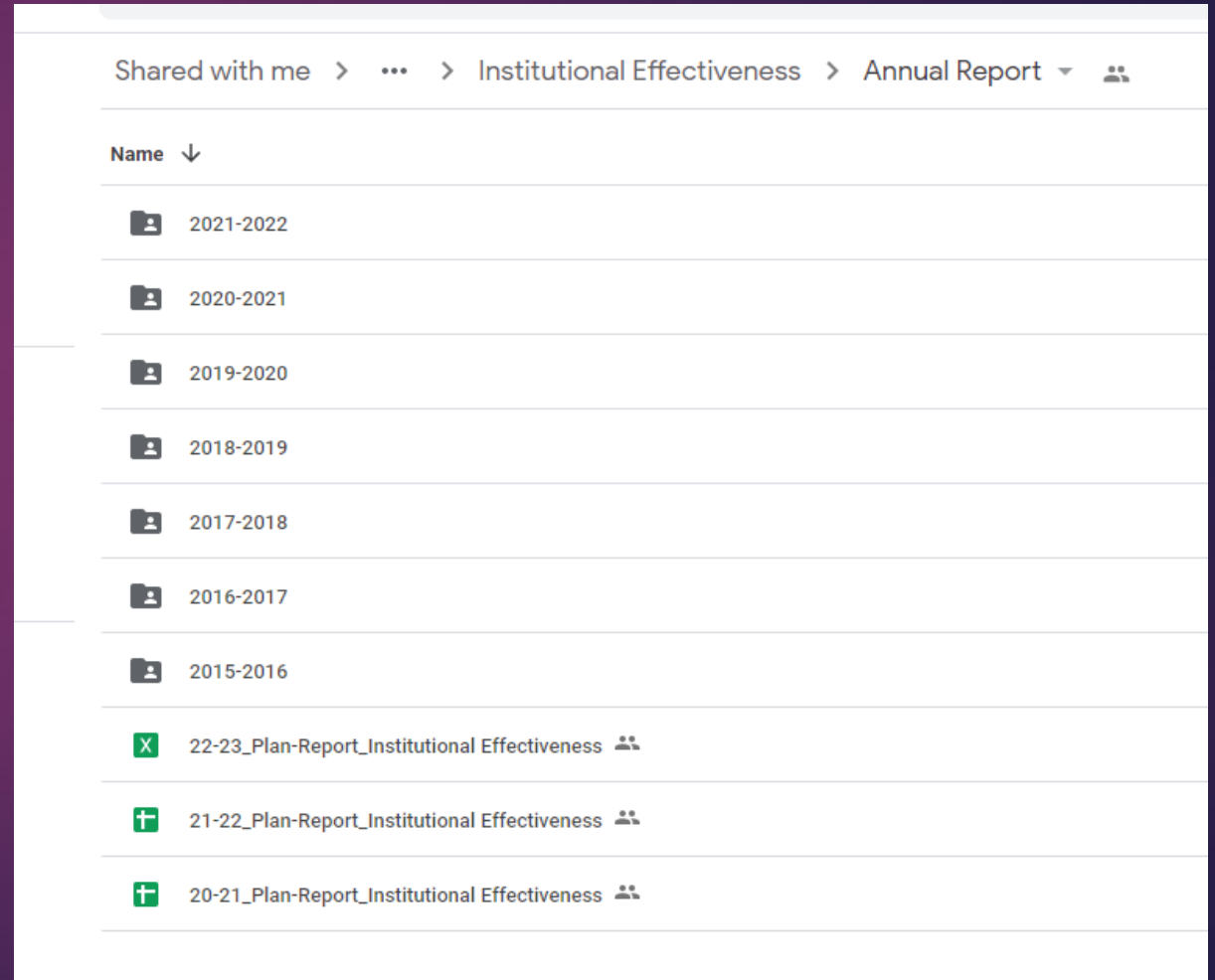


# The Report

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.

20-21\_Plan-Report\_Institutional Effectiveness

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Instructions for Completing the Annual Plan - Annual Report

**Instructions for Completing the Annual Plan - Annual Report**

**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 completed and discussed with supervisor at the end of the fiscal/academic year.

**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.

**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."

**SWF 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.

**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.

**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."

**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."

**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."

**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."

Instructions 2020-2021 Annual Plan-Report AA\_S\_Ds Divisions S\_Ds

# 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

	A	B
1	Reporting Year:	2020-2021
2	Dept/Unit Name:	Institutional Effectiveness
3	Dept/Unit Lead:	Angela Bryan
4	Reporting Unit:	Office of the Provost
5	Supervisor:	Michelle Williams
6	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.**

1	Planning Year:	2021-2022					
2	Dept/Unit Name:	Institutional Effectiveness					
3	Dept/Unit Lead:	Angela Bryan					
4	Reporting Unit:	Office of the Provost					
5	Supervisor:	Michelle Williams					
6	Division:	Academic Affairs					
7	PLAN PORTION				REPORT PORTION		
8	Goal/Indicator	UWF Strategic Direction	Division Strategic Direction	Tasks/Expected Outcome(s)	Method/Documentation	Result(s)	Use of Results
9	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.
10	<b>Strategic Direction 1: Learner Centered and Focused</b>						
11	Collaborate with division heads to demonstrate culture of seeking improvement in academic and academic support units.	1.2 Align resources to deliver exceptional support services and learning opportunities that will ensure students have access, continuity, and success while earning degrees.	1.2 Manage curricula and collaboratively provide learning opportunities and support services that facilitate timely progress to completion for all learners.	1. Work with units to identify data sources to inform annual planning and reporting. 2. Present to various planning units on new reporting forms as requested. 3. Collaborate with DAESA and other internal constituents to revise Graduate Student Exit Survey. 4. Collaborate with DAESA on the NSSE 2020 administration.	1. Meeting logs and notes. 2. Google Sheet tracking reports/plans we recieved.		
12	Assist in Ensuring quality of educational	1.2 Align resources to deliver exceptional support services and learning opportunities that	1.2 Manage curricula and collaboratively provide learning opportunities and support	1. Start a plan for the 10th year report to SACSCOC. Identify areas to strengthen our responses to the standards. 2. Provide support and	1. Calendar of weekly meetings with Vice Provost and IE. 2. Xitrac reports of standards and shared google files to create working documents. 3. Registration for		

# Completing the Annual Report



- ▶ Fill in **last 2 columns** for each goal:
- ▶ **Results** – what happened
- ▶ **Use of Results** – what you will do with the information for next year
- ▶ It's ok if the goals aren't completed, just report on progress.
- ▶ Some goals will be ongoing from year to year, such as enrollment, retention, and graduation.

1	Planning Year:	2021-2022					
2	Dept/Unit Name:	Institutional Effectiveness					
3	Dept/Unit Lead:	Angela Bryan					
4	Reporting Unit:	Office of the Provost					
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6	Division:	Academic Affairs					
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# Example 1- Process related goal

- ▶ The dept. identified 1 task and 1 measure for Goal 1.
- ▶ Progress or completion is reported in the **Results** column (Col. E/F)
  - ▶ Reported the calculated average time to appointment.
- ▶ Next steps are reported in the **Use of Results** column (Col. F/G)
  - ▶ Unit response reflects an action related to the evaluation of the results.
  - ▶ *“Continue to look for efficiencies and evaluate again next year.”*

7	Goal/Indicator	UWF Strategic Direction	Tasks/Expected Outcome(s)	Methods/Documentation	Result(s)	Use of Results
8	Ex. 1. Maintain adequate personnel to support the mission of the University with regard to the Office of the Registrar.	2.1 Attract, retain, and develop high-quality diverse faculty and staff.	1. Propose additional DegreeWorks Coordinator to process student applications for degree.	1. Job description	1. New line approved for 2018-2019.	1. Re-distribute workload among existing DegreeWorks Coordinators.
9	1. Shorten average time to appointment for resume services from 5 days to 3 days.	1.2 Align resources to deliver exceptional support services and learning opportunities that will ensure students have access, continuity, and success while earning degrees.	1. 100% of requested appointments for resume services will be scheduled within 2-4 days.	1. Avg time to Appt.	Average time to appointment is 3.5 days.	Continue to look for efficiencies and evaluate again next year.
10	2. Student satisfaction with resume services will be 85% or higher.	1.2 Align resources to deliver exceptional support services and learning opportunities that will ensure students have access, continuity, and success while earning degrees.	1. Review web-based resume services. 2. Provide larger variety of sample resumes. 3. Update resume training to coordinators working with students.	1. Results of student satisfaction surveys. 2. NSSE items related to resume services.	1. Navigate results were reported as 93% of students were satisfied or highly satisfied with resume services (N=257). 2. NSSE item results as the institution contributed "very much" or "quite a bit" to student acquiring job- or work-related knowledge and skills reported as 87% (N = 534).	Navigate results were above benchmark. Some student comments requested some YouTube videos related to resume preparation. Other student comments suggested a LiveChat for quick questions related to resume preparation. Will explore options for additional additional resume services via Career Education website.

# Example 2 – Satisfaction related goal

- ▶ The dept. identified 3 tasks and 2 measures for Goal 2.
- ▶ Progress or completion is reported in the **Results** column (Col. E/F)
  - ▶ Reported the actual results for the 2 measures.
  - ▶ Satisfaction survey results
  - ▶ NSSE – related item results
- ▶ Next steps are reported in the **Use of Results** column (Col. F/G)
  - ▶ Reflects that both measures were above the benchmark.
  - ▶ Action includes ideas for further improvement rather than actual changes.

7	Goal/Indicator	UWF Strategic Direction	Tasks/Expected Outcome(s)	Methods/Documentation	Result(s)	Use of Results
8	Ex. 1. Maintain adequate personnel to support the mission of the University with regard to the Office of the Registrar.	2.1 Attract, retain, and develop high-quality diverse faculty and staff.	1. Propose additional DegreeWorks Coordinator to process student applications for degree.	1. Job description	1. New line approved for 2018-2019.	1. Re-distribute workload among existing DegreeWorks Coordinators.
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10	2. Student satisfaction with resume services will be 85% or higher.	1.2 Align resources to deliver exceptional support services and learning opportunities that will ensure students have access, continuity, and success while earning degrees.	1. Review web-based resume services. 2. Provide larger variety of sample resumes. 3. Update resume training to coordinators working with students.	1. Results of student satisfaction surveys. 2. NSSE items related to resume services.	1. Navigate results were reported as 93% of students were satisfied or highly satisfied with resume services (N=257). 2. NSSE item results as the institution contributed "very much" or "quite a bit" to student acquiring job- or work-related knowledge and skills reported as 87% (N = 534).	Navigate results were above benchmark. Some student comments requested some YouTube videos related to resume preparation. Other student comments suggested a LiveChat for quick questions related to resume preparation. Will explore options for additional additional resume services via Career Education website.



# 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.

Career Education

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fx Instructions for Completing the Annual Plan - Annual Report

Instructions for Completing the Annual Plan - Annual Report

**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. The **PLAN** portion of the table is Cols. A - E and should be completed and reviewed with your supervisor at the end of the fiscal/academic year.  
**Annual Reports** are an update of an Annual Plan that reflect the accomplishments of the year. The **REPORT** portion of the document is Cols. F-G and reflects the achievement or progress toward the goal. The Report is completed and discussed with supervisor at the end of the fiscal/academic year.

**Identification Information:** Complete fields in Col A Rows 2-6 as appropriate to include: Dept/Unit Name, Division Name, Supervisor Name and Division.

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**UWF Strategic Direction:** Select the strategic direction that best fits the goal or indicator. This is a drop-down menu. If a goal or indicator may map to more than one strategic direction, select the best fit for this field.  
**Division Strategic Direction:** Select the division strategic direction that best fits the goal or indicator. This is a drop-down menu. If a goal or indicator may map to more than one strategic direction, select the best fit for this field.

**Expected Outcome:** Each goal/indicator should have at least one expected outcome, but you may have multiple. Example: "1. Develop new Master's degree in International Affairs."  
**Assessment Instrument(s):** Each expected outcome should have at least 1 assessment instrument, but may have multiple. Example: "1. Internal and CAVP Preproposal documents prepared.  
2. CCRs approved.  
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**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.  
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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."

+ ≡ Instructions Annual Plan-Report S\_Ds Divisions


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

- ▶ 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

<b>Planning Year:</b>	2022-2023
<b>Dept/Unit Name:</b>	Institutional Effectiveness
<b>Dept/Unit Lead:</b>	Angela Bryan
<b>Reporting Unit:</b>	Office of the Provost
<b>Supervisor:</b>	Michelle Williams
<b>Division:</b>	Academic Affairs


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

- ▶ The remainder of the form is divided into 2 portions:
  - ▶ The Plan (Cols. A-D) and
  - ▶ The Report (Cols. E/F)
  - ▶ Note: If you are under the Provost's office, there is an extra column for the Division Strategic Directions. For these units, the Plan is Cols. A-E and the Report is Cols. F-G.
- ▶ Let's review the types of goals you may want to include.

The Plan				The Report													
A	B	C	D	E	F												
 <b>UNIVERSITY of WEST FLORIDA</b> Institutional Effectiveness 2022-2027 Strategic Directions 2022-2023 Annual Plan																	
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8	<table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 20%;">Planning Year:</td> <td>2022-2023</td> </tr> <tr> <td>Dept/Unit Name:</td> <td>Institutional Effectiveness</td> </tr> <tr> <td>Dept/Unit Lead:</td> <td>Angela Bryan</td> </tr> <tr> <td>Reporting Unit:</td> <td>Office of the Provost</td> </tr> <tr> <td>Supervisor:</td> <td>Michelle Williams</td> </tr> <tr> <td>Division:</td> <td>Academic Affairs</td> </tr> </table>					Planning Year:	2022-2023	Dept/Unit Name:	Institutional Effectiveness	Dept/Unit Lead:	Angela Bryan	Reporting Unit:	Office of the Provost	Supervisor:	Michelle Williams	Division:	Academic Affairs
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# What do I do with the Annual Plan/Report form?

- ▶ **At the beginning of the academic/fiscal year, you complete the Plan portion of the form. (Cols. A-D).**
- ▶ *The objective would be that this Annual Plan will reflect the activities of your department for the coming fiscal year.*
- ▶ A customary number of goals for any unit would be 3-8.
- ▶ Each goal should:
  - ▶ Be measurable
  - ▶ Tie to a Strategic Direction
  - ▶ Have an expected outcome
  - ▶ And have some measurable evidence of effort.

 <b>UNIVERSITY of WEST FLORIDA</b> Institutional Effectiveness 2022-2027 Strategic Directions 2022-2023 Annual Plan						
2	Planning Year:	2022-2023				
3	Dept/Unit Name:	Institutional Effectiveness				
4	Dept/Unit Lead:	Angela Bryan				
5	Reporting Unit:	Office of the Provost				
6	Supervisor:	Michelle Williams				
7	Division:	Academic Affairs				
PLAN PORTION				REPORT PORTION		
Goal/Indicator	UWF Strategic Direction	Tasks/Expected Outcome(s)	Method/Documentation	Result(s)	Use of Results	
8	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 in International Affairs forwarded to BOG for approval. Will begin admitting students next academic year.
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# 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](mailto:abryan@uwf.edu)
- ▶ Carolyn Beamer, Asst. Director  
850-474-2239  
[cbeamer@uwf.edu](mailto:cbeamer@uwf.edu)