

Office of Institutional Effectiveness & Assessment

Plan Writer Guide



Spring 2015

TIPS FOR PLANNING THE NEXT TWO YEARS

...or the next two years of your 25-year plan

Start Big: Consider yourself the *owner* of your department, office, or area. It's *your* small business, so to speak. Just your department; just you/your faculty & staff.

NOTE: THIS IS A TEMPORARY SCENARIO!

Ask the Right Questions to develop your **GOALS**:

With no limits, what would this place look like in two years? What do I want my students to know, do, and be like after they leave? How do we drive STC *forward* from this office/department/closet?

Ask the Right Questions in light of these goals to get your **STRATEGIES**:

What can/could we do to make those ideas come to reality?

What qualities/components of this goal can we effect? What would that look like?

Who would do this? How long would it take?

What's stopping you?

What views are not being represented here?

Are there obstacles that we have not considered?

Who else could give an alternative view on this/these? (STC, non-STC)

Where could we find out if this has worked somewhere else?

NOW, start to get specific about things. Determine your **OBJECTIVES**:

In what measureable way could you KNOW you were successful?

Do you need money for this? How much?

Do you need more people for this? How many?

Do you need something unavailable at STC or in the RGV?

Next, determine what **TACTICS** (**TOOLS**) you will use to reach each OBJECTIVE. These Tactics could be budgetary, but they could include new approaches, new uses of what we already have, reorganization of duties, new personnel, hammers, a new focus in classrooms, commitment from others to follow through, or any number of Tools to get the job done.

Finally, tell the "data folks" whether you will be needing any of their work (METRICS). That will likely result in a phone call or email to set up the proper time and format for receiving such data. If you collect this data within your department, just put "Not Applicable."

There is a "**NOTES**" section at the bottom. This gives you an opportunity to put any conditions, reminders, or other significant things in a specific place in the plan.

Plan Component Definitions

Goal—a broad, primary outcome that your office or department intends to achieve

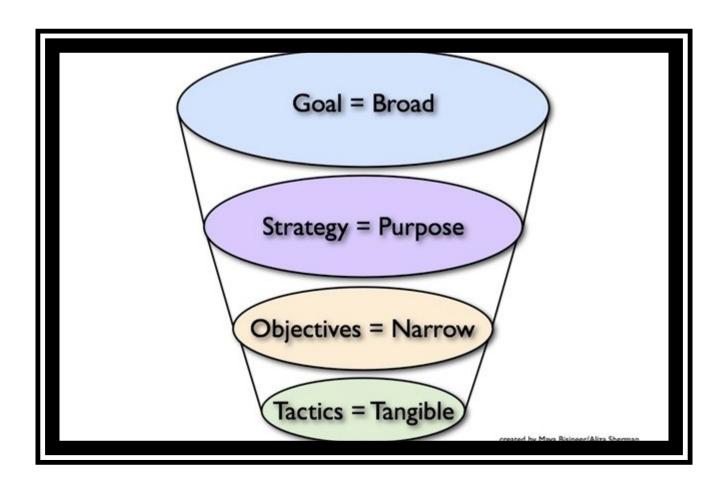
Strategy—a plan for reaching a Goal

Objective-- a measurable step you will take to achieve your Strategy

Tactic/Tool—the means of achieving the Objective

Metric—the data (if any) that will be needed to document whether an Objective has been achieved

Presidential Directive—a direct notification from the Office of the President regarding an IE plan



South Texas College's Strategic Directions

Clear Pathways

South Texas College provides students with clear pathways to facilitate coherent educational experiences and timely completion of a post-secondary credential leading to relevant employment and/or further educational experiences.

Access and Success

South Texas College is committed to increasing the college-going and college-completing rates in the region.

High Success Rate

South Texas College engages in effective, proven efforts to ensure student success and positively affect the economic and social mobility of residents in our region.

Collective Responsibility

South Texas College empowers faculty to work together within and across disciplines to design best learning experiences for students, leading to their academic success, career readiness, and timely completion.

Collaboration

South Texas College commits to effective interdepartmental and interdivisional collaborations and advances mutually beneficial community and educational partnerships that create a collective impact on student success.

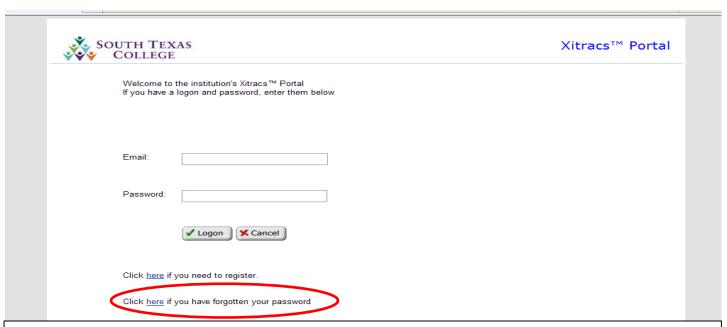
Cost Efficiency

South Texas College seeks innovative redesign of college processes to promote new approaches to cost-consciousness and cost-efficiency.



Begin by visiting the IEA website: <u>iea.southtexascollege.edu</u>.

Click on the Xitracs icon.

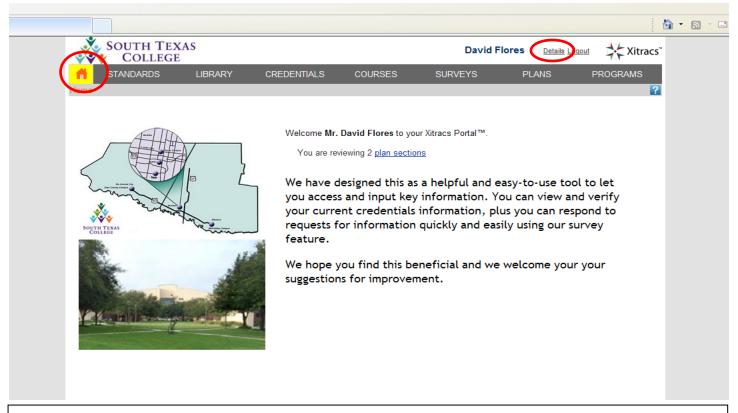


Enter your full South Texas College email address and use the password 'temp'.

If you already have a Xitracs login, enter your password.

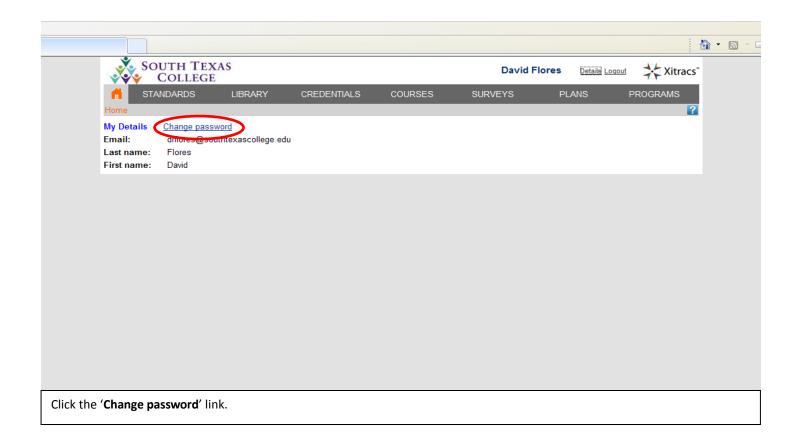
The link at the bottom of the page will allow you to reset your password.

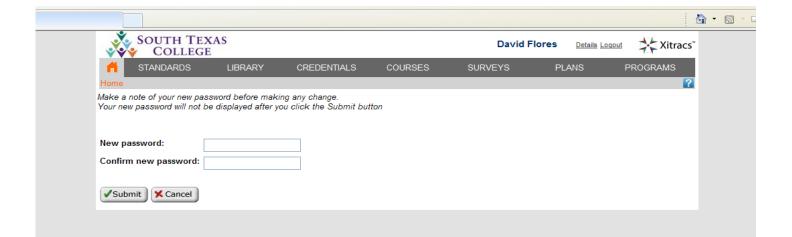
If you experience login difficulties, contact David Flores at drflores@southtexascollege.edu or call #5587



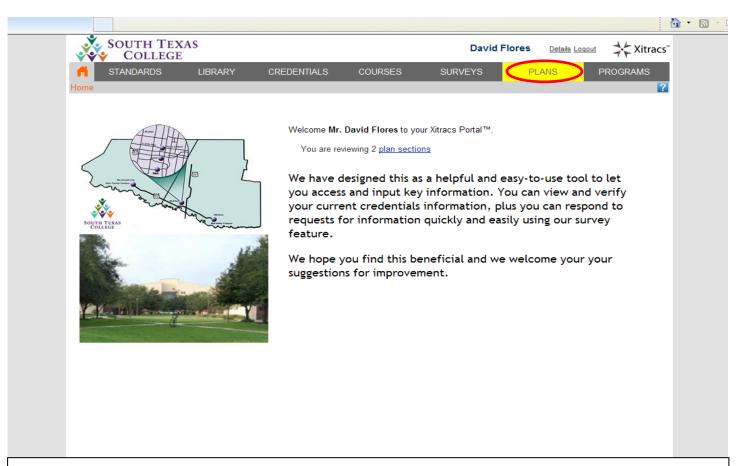
To change your password, start from the Xitracs home page.

Click on the 'Details' link that appears next to your name.

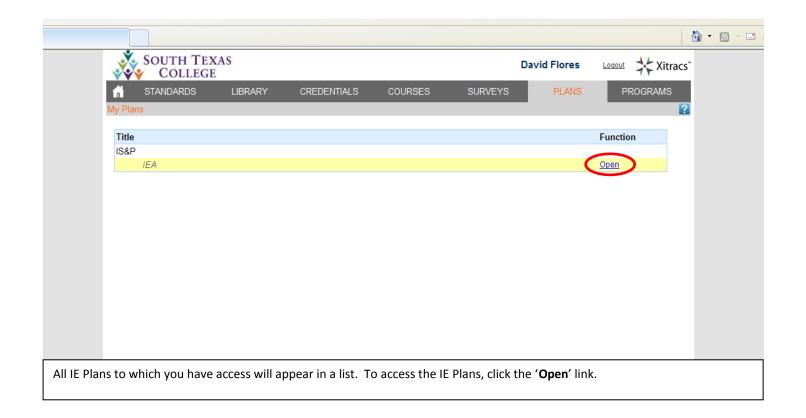


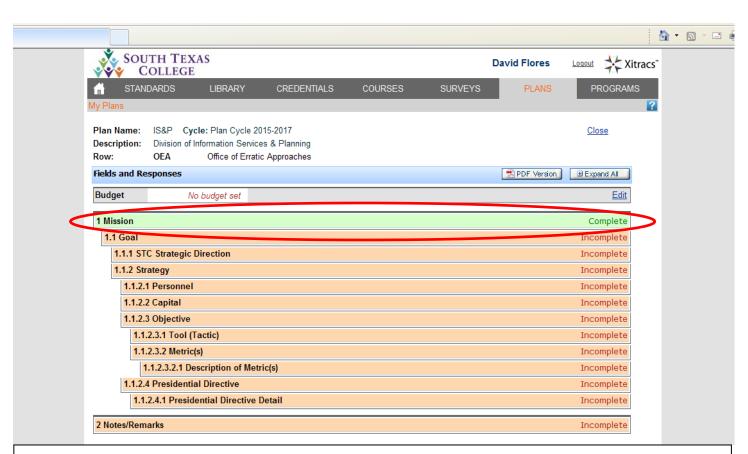


Enter and confirm your new password. *Note: your Xitracs password will NOT need to be updated every 180 days like your JagNet password. The password you enter will remain in place until you choose to change it.

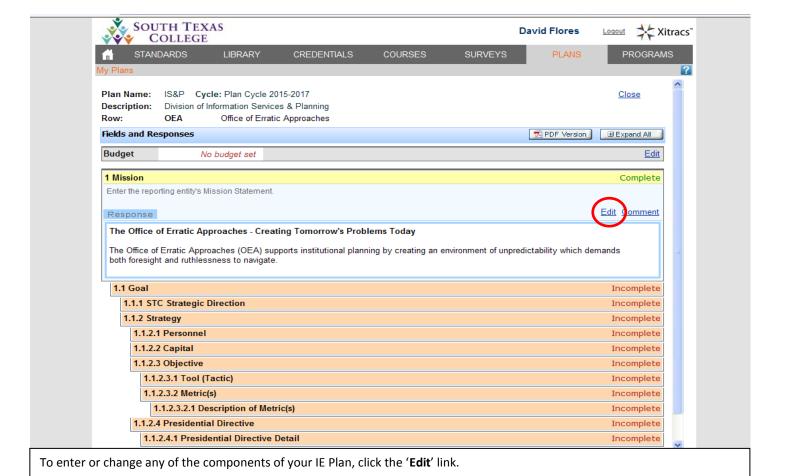


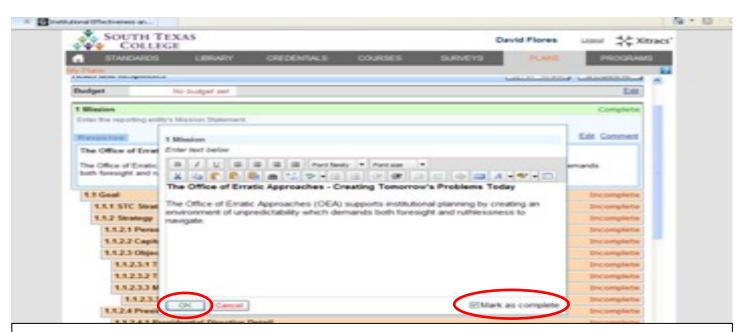
To view access your IE Plan, click on the 'Plans' tab.





IE Plan components marked as Complete will appear in green. Components that have not yet been completed will appear in orange. To view the details of an IE Plan component (Mission, Goals, Strategies, etc.) simply click on the appropriate bar section.



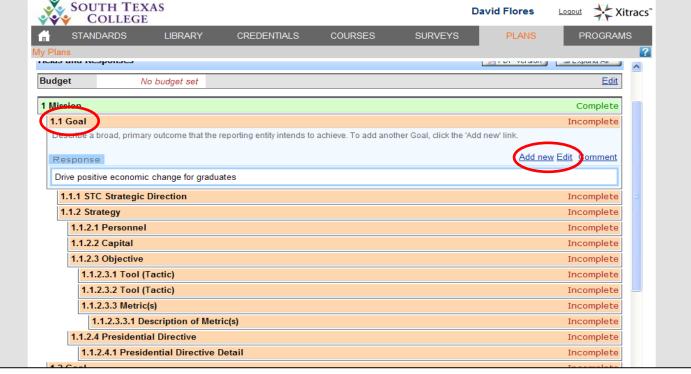


Some IE Plan components will require you to provide a description of what you intend to do. Enter your description in the text-box provided.

Check the 'Mark as complete' box at the bottom-right to indicate that you are finished editing this IE item. You will still be able to make edits later.

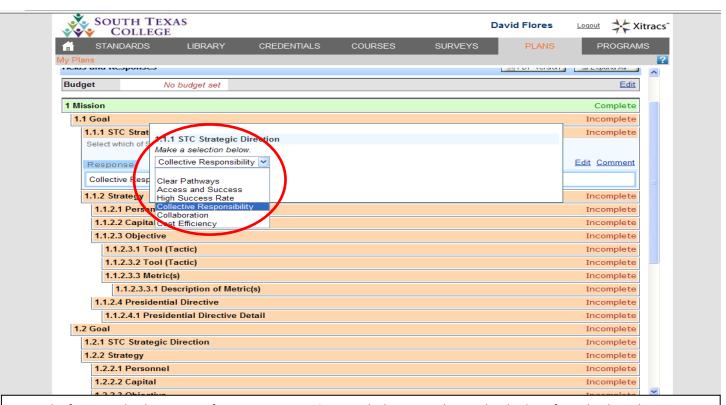
When you are ready to save your work, click the 'OK' button at the bottom-left.

This process is similar for creating Goals, Strategies, Objectives and Tools (Tactics).



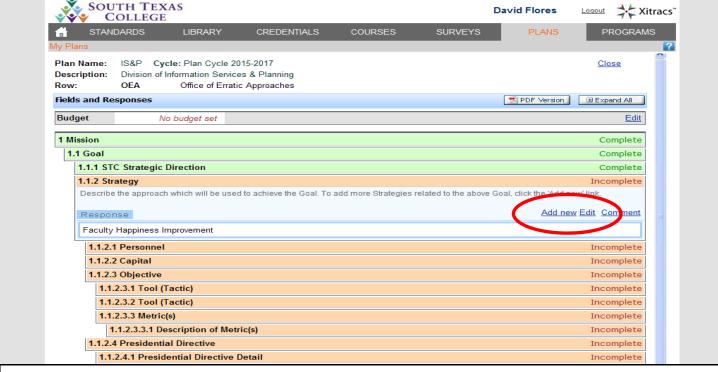
To enter your first IE Goal, click the 1.1 Goal section, and click on the 'Edit' link.

To create additional Goals, click the 'Add new' link which appears on Goal 1.1. This will create a new Goal 1.2 and all of the IE Plan components that fall below a Goal (Strategic Direction, Strategy, etc.).

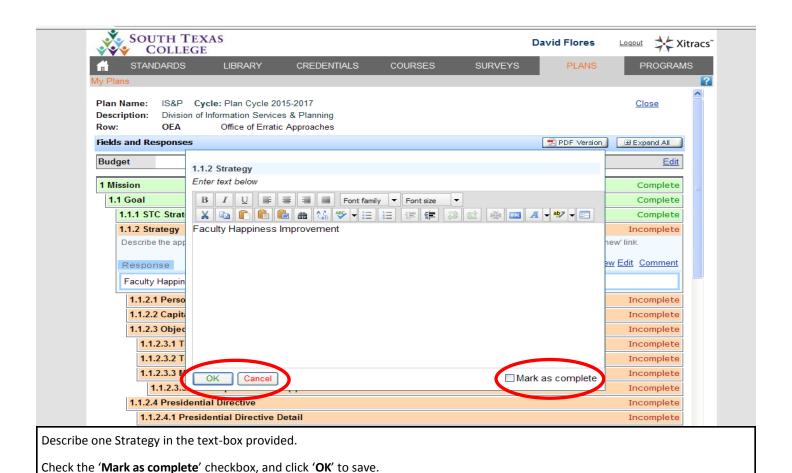


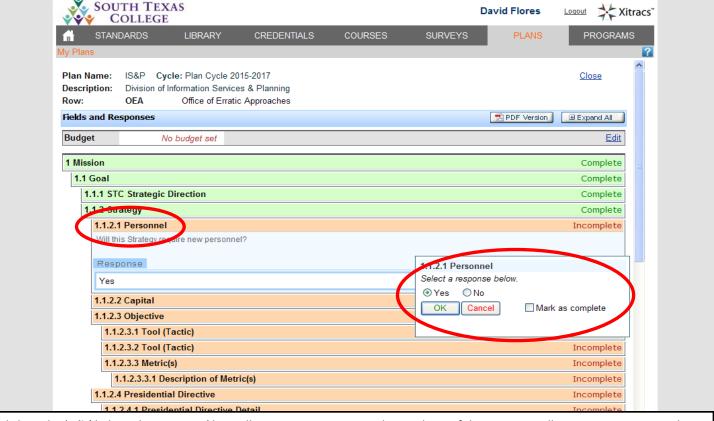
For each of your Goals, choose one of six Strategic Directions to which your Goal most closely aligns from the drop-down menu. You can consult the front of this document for descriptors of each Strategic Direction.

Check the 'Mark as complete' checkbox and click 'OK' to save.

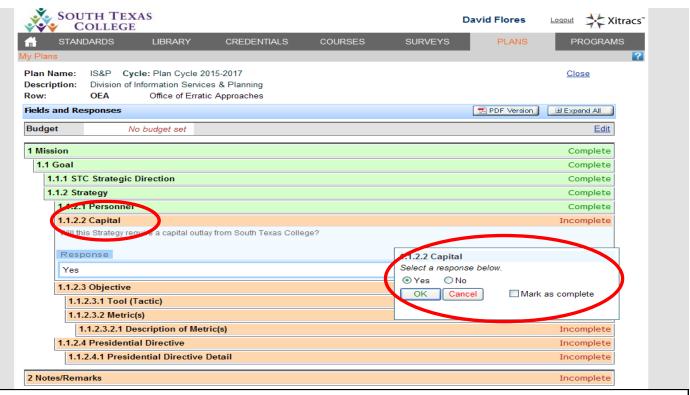


For each Goal, describe <u>at least</u> one Strategy which will be used (feel free to use more than one Strategy). To enter your Strategy, click the 'Edit' link. To create additional Strategies for the same Goal, click the 'Add new' link.

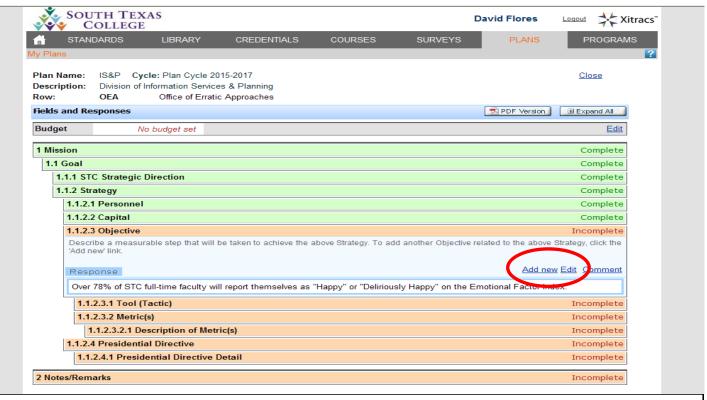




Clicking the 'Edit' link on the Personnel bar will generate a pop-up window. Indicate if this Strategy will require <u>new Personnel</u> to be hired by selecting 'Yes' or 'No'. Click the 'Mark as complete' checkbox, and click 'OK' to save.

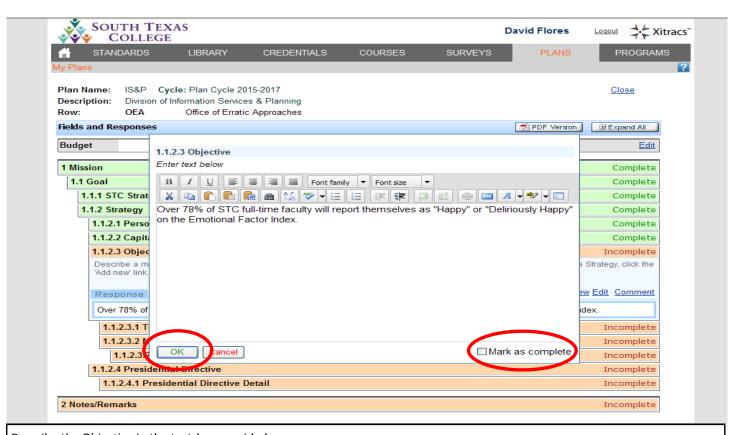


Similarly, clicking the 'Edit' link on the Capital bar will generate a pop-up window. Indicate if the above Strategy will require an increase in capital outlay or a significant budget adjustment by selecting 'Yes' or 'No'. Click the 'Mark as complete' checkbox, and click 'OK' to save.



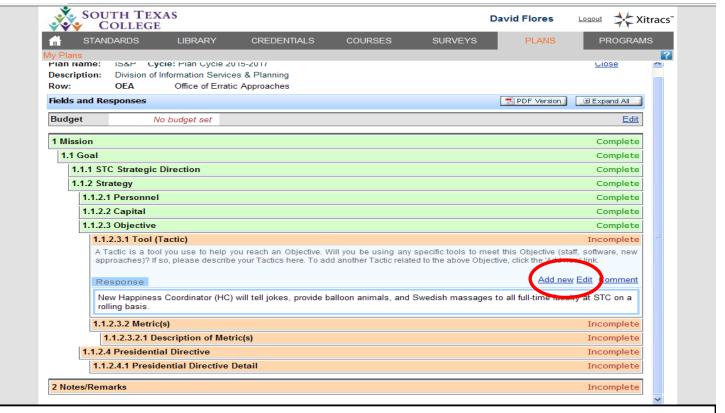
To add an Objective to a Strategy, expand the **Objective** bar and click the 'Edit' link.

To create additional Objectives for the same Strategy, click the 'Add new' link.



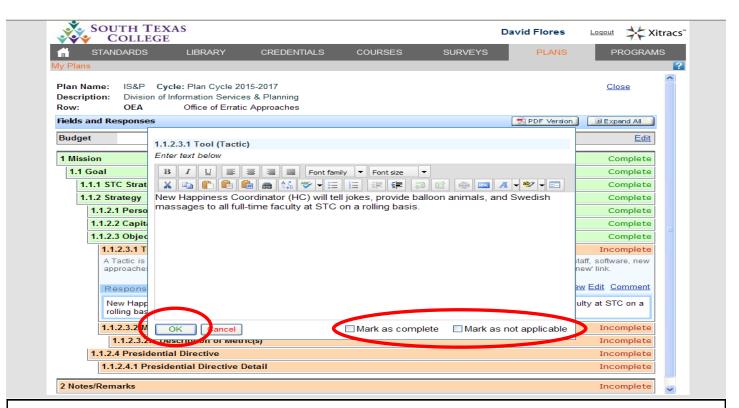
Describe the Objective in the text-box provided.

Check the 'Mark as complete' checkbox, and click 'OK' to save.



To enter a Tool or Tactic which will be utilized to meet each Objective, click the 'Edit' link.

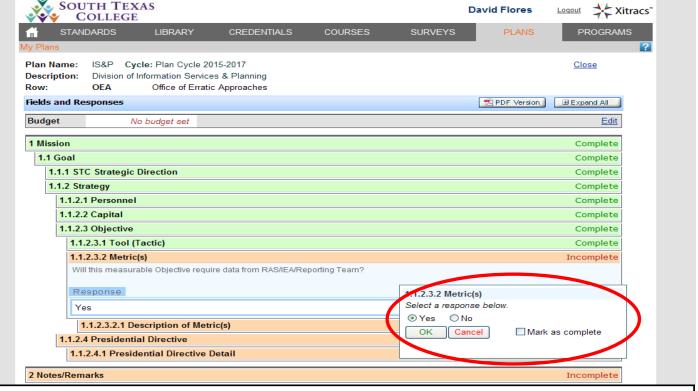
To create additional Tools/Tactics for the same Objective, click the 'Add new' link.



If the Objective described above requires a Tool/Tactic in order to be met, then describe the Tool/Tactic in the text-box provided.

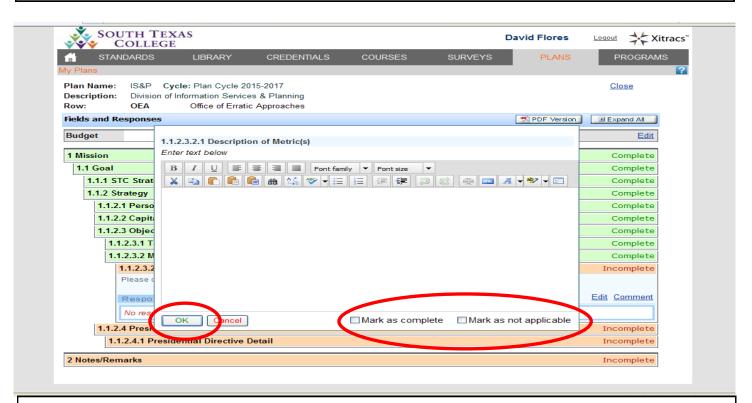
If the above Objective does not require a new Tool or Tactic in order to be met, then check the 'Mark as not applicable' checkbox.

Check the 'Mark as complete' checkbox, and save by clicking 'OK'.



Indicate whether or not the Objective described above will require data from RAS, IEA, or the Reporting Team by clicking 'Edit' on the Metric(s) bar.

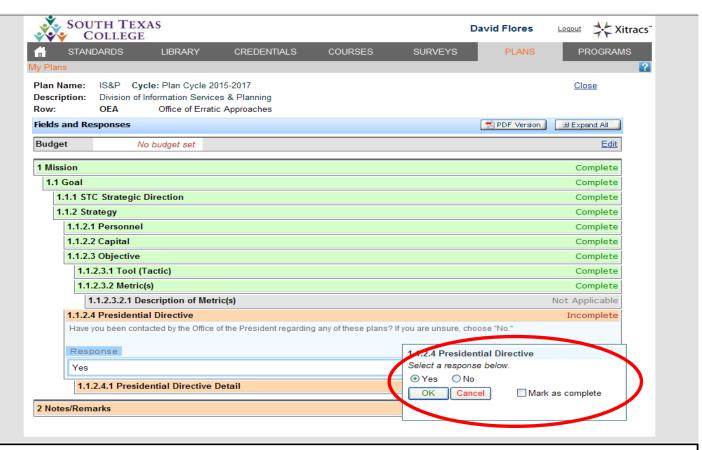
Click 'Yes' or 'No', check the 'Mark as complete' checkbox, and click 'OK' to save.



Click the 'Edit' link on the Description of Metric(s) bar to describe what data (if any) that will be needed to measure how the Objective described above will be met.

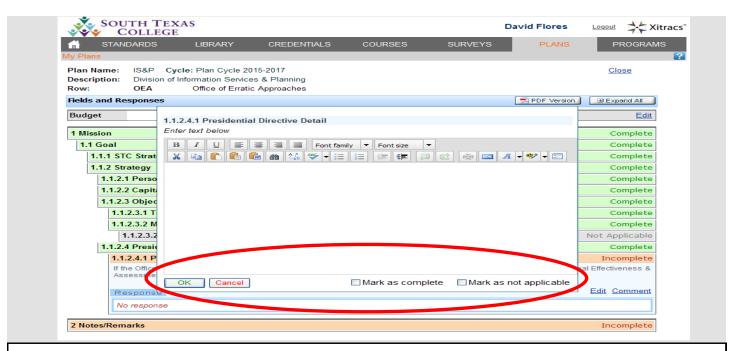
If the Objective does not require data from RAS, IEA, or the Reporting Team, then check the 'Mark as not applicable' checkbox.

Check the 'Mark as complete' checkbox, and click 'OK' to save.



Click 'Edit' on the Presidential Directive bar. If the Office of the President has requested (directly) any of your plan elements, then indicate the Goal, Strategy, or Objective described above as a Presidential Directive.

Select 'Yes' or 'No', check the 'Mark as complete' checkbox, and click 'OK' to save.



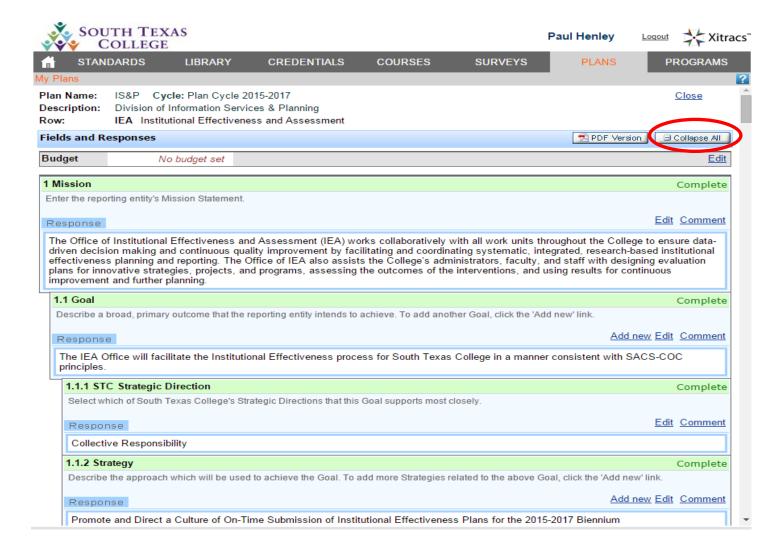
If the Office of the President has requested (directly) any of your plan elements, explain those in the text-box provided.

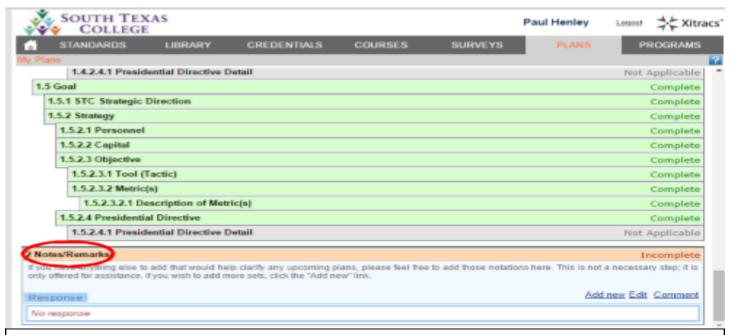
If the Office of the President has not requested the Goal, Strategy, or Objective described above directly, then check the 'Mark as not applicable' checkbox.

Check the 'Mark as complete' checkbox, and click 'OK' to save.

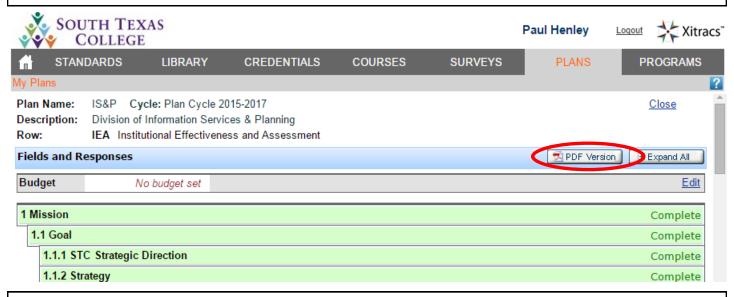


At any point, you can expand or collapse the plan you are writing by using the Expand All/Collapse All button at the top right of the Fields and Responses section.





At the end of the process, there is a Notes/Remarks area. If you have anything else to add that would help clarify any upcoming plans, please feel free to add those notations here. You can also leave this section blank.



To create a PDF version of your plan (for printing, emailing, sharing, or just saving), click on the link at the top of the plan screen.

When you are finished with editing your plan, simply hit the Close button or Logout button in the upper right corner of the portal web page.



