Updating Institutional Effectiveness Plans in Compliance Assist

Three Components:

- 1. Mission
- 2. Unit/College Goals
- 3. Institutional Effectiveness (IE) Detail
- Log into <u>Compliance Assist (https://ufl.compliance-assist.com/index.aspx</u>) and enter your GatorLink username and password.
- Click "Planning" from the list of Available Web Sites.

Tending Si		RSITY of	Welcome, Timothy Brophy Log
<u>Home</u>	Settings	Permissions	C Options
		Welcome to the Unive	rsity of Florida's <i>Compliance Assist!</i> landing site. Please select from one of the ons on the left to enter that module.
niversity of Flo	rida Home Page		Powered by Compliance As

• Now click "My Dashboard" and then click the blue "Edit Filter" button and select the next fiscal year. The system will default to the current year. Then click "OK".

Dasii	board - My	Roles		Select Items	
ly Roles	University Stra	Unit/College Pl	Assessment Pl	Fiscal Year:	FY 2015-16
	iltered By: Fiscal Year: FY 20 Edit Filter as to View: Responsible Only	ions, Unit/College Goals, Ins	itutional Effectiveness Details	 Program Missi Program Goals Student Learni 	sion & Vision y System Goals esidential Goals pals lissions oals fectiveness Details ons

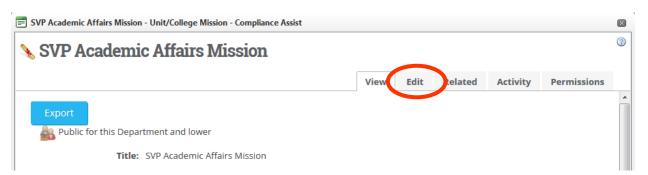
• Next click the "Unit/College Plans" tab.

My Roles University Strate	Unit/College Plan	Assessment Plans	Budget Roles				
Table Filtered By: Fiscal Year: FY 2014-15 Edit Filter Unit/College Missions, Unit/College Goals, Institutional Effectiveness Details University of Florida • New Item						ear: FY 2014-15	
 Academic Affairs Agriculture & Natural Resources, IFAS Development & Alumni Affairs 	1	Number	<u>Name</u>	<u>Start</u>	End	Progress	
General Counsel Health Affairs SVP & COO	No items to di	splay					

• Then select the appropriate unit or college from the listing on the left. You can expand VP areas by clicking on the "+" to the left of each title. As an example, Business Affairs is displayed below:

My Roles	My Roles University Strate			Plans	Asse
Tab	ble Filtered By: Fiscal Year: FY 2 Edit Filter		Init/College	Goals, Insti	itutional
University of Flo	prida		🕂 New Ite	m	
···· Developmen	& Natural Resources, IFAS It & Alumni Affairs		N	<u>Numbe</u>	r
	General Counsel Health Affairs			Goal 1	
Business		•	Ó	Goal 2	
	Chief Information Officer Human Resource Services			Goal 3	
Research University Re			1		

• To edit an item already in the system, click on the blue hyperlinked name, and that item will open in a new window. The item will default into the view mode, but click the "Edit" tab to make revisions.



Mission

Mission Items to check for accuracy or update:

- > Mission
- Progress
- Responsible Role

🗐 SVP Academic Affairs Mission - Unit/College Mission - Compliance Assist	×				
SVP Academic Affairs Mission	?				
View Edit Related Activity Permissions economic development. The Provost and Senior Vice President for Academic Arrains, who leads this unit, is considered to be the institution's chief academic officer: the college deans and several unit directors report directly to the Provost on academic matters. The Provost also leads some of the operational aspects of the institution in support of this mission. Other administrators who report to the Provost are: the VP for Student Affairs, the VP for Enrollment Management. the Chief Einancial Officer. the Chief Information Officer. the Director of Institutional Research and View Edit Related Activity Permissions	•				
Start: 7/1/2014 Choose Fiscal Year Dates End: 6/30/2015 Progress: Ongoing Unit/College: Academic Affairs Clear					
Responsible Roles: > Manage > Delete Selected Role Permission Provost and Senior Vice President (Joseph Glover) Reviewer					
Created 4/25/2014 at 10:31 AM by Cheryl Gater Save Save & Close Delete Close	-				

- To update the Progress field, select the appropriate option from the drop down window.
- To update the Responsible Roles field, click "Manage" and a new window will open.

Responsible Roles:	🍃 Manage 💢 D	elete Selected
	Role	Permission



- In the User Name field, start typing the last name of the person responsible for the mission, the field will auto populate for you to select the individual. Once you have selected the individual, click "Search".
- •
- If the person's name is incorrect or unavailable, please email Cheryl Gater at <u>cgater@aa.ufl.edu</u>.

Complian	e Availabl	e Roles		
Role Na Search User Na Gater, Depart Search Search	ame: Cheryl ment:			View: My Roles All Institution Roles
Avail	lable Roles			Selected Roles
	<u>Role</u>	<u>Department</u>	Add Roles 💌 <u>Assigned</u>	Delete Selected X Delete All Name Department Assigned Upper
	<u>Name</u> Director of SACS	Academic Affairs	<u>User</u> Gater, Cheryl	Name Department Assigned User No Roles to display.
				Add Roles Cance

• Once the person is selected, his/her name will appear under "Available Roles", check the box to the left of the person's Role Name, then hover your cursor over "Add Roles" and click "<u>Selected</u>".

Avail	lable Roles			Selected Roles
			Add Roles 💌	💥 Delete Selected 🛛 💥 Delete All
•	<u>Role</u> <u>Name</u>	<u>Departmen</u>	Selected →	Name Department Assigned User
	Director of SACS	Academic Affairs	Gater, Cheryl	No Roles to display.

• Now the person's name will appear to the right under "Selected Roles" and you can click "Add Roles" to assign that person as the Responsible Role:

Add Roles	•	De				
		X De	lete Selected	💥 Delete All		
RoleDepartmentAssignedNameUser			<u>Name</u>	<u>Department</u>	<u>Assigned</u> <u>User</u>	
Director of University of Gater, Cheryl SACS			Director of SACS	Academic Affairs	Gater, Cheryl	-

• The person's name will now appear under the Responsible Roles of the item:

Responsible Roles:	🍃 Manage 🛛 💢 Delete Selected	
	Role	Permission
	Director of SACS (Cheryl Gater)	Administrator

• Once all other edits and changes have been made or the information in the system is verified, click "Save & Close" to save all of your work.

Save	Save & Close	Delete	Close

Unit/College Goals

Unit/College Goal items to check for accuracy or update:

- ≻ Goal
- ➢ Update Number field
- Responsible Role
- > Progress

......

- Action Items
- Measures of Action Items
- Time Period of Action Items
- Resources of Action Items
- To update each Unit/College Goal, click the blue hyperlinked name.

🕂 New Iter	n	
	<u>Number</u>	<u>Name</u>
\$		SVP Academic Affairs Mission
Ó	2014-15 Goal 1	Top 10 status
Ò	2014-15 Goal 2	<u>UF Online</u>
Ó	2014-15 Goal 3	UF Common Core
×		SVP Academic Affairs IE Detail

• The goal will open in the "view" format, to edit click the "Edit" tab in the upper right corner.

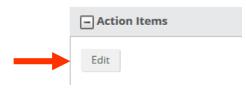
Top 10 status - Unit/College G	oal - Compliance Assist							
🙆 Top 10 status								0
			View	Edit	Related	Activity	Permissions	
Export Public for this Depart	tment and lower							*
Number:	2014-15 Goal 1	0						
Title:	Top 10 status		.4					

• Verify there are no changes to the Unit/College Goal or make necessary edits.

- Update the "Number" field.
 - You may either update the number to Goal 1, Goal 2, etc. or continue using the fiscal year and update it to reflect the future fiscal year and goal number, for example, 2015-16 Goal 1, 2015-16 Goal 2, etc.

ſ	Top 10 status - Unit/College G	ioal - Compliance Assist						\mathbf{X}
	🔗 Top 10 status							0
			View	Edit	Related	Activity	Permissions	
	Export							* III
	Number:	2014-15 Goal 1						
	Title:	Top 10 status	.41					

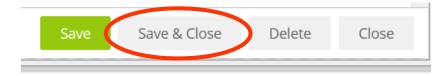
- Assign a Responsible Role (directions are the same as for the Mission section).
- Select the appropriate option from the Progress field drop down menu, if uncertain "Ongoing" is fine, or verify the option selected is accurate.
- Verify there are no changes to the Action Items or make necessary edits.
 - To Edit the Action Items, click the grey "Edit" button directly below the Action Items title.



- A new text box window will open.
 - Once the edits are complete, click the blue "Update button.

Action Items	×
Design	s: 0
Update Ean	ncel

• Once all other edits and changes have been made or the information in the system is verified, click "Save & Close" to save all of your work.



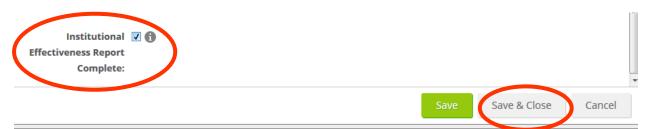
- Verify there are no changes to the Measures of Action Items or make necessary edits. To edit this field, the directions are the same as listed under "Action Items".
- Verify there are no changes to the Time Period of Action Items or make necessary edits. To edit this field, the directions are the same as listed under "Action Items".
- Verify there are no changes to the Resources of Action Items or make necessary edits. To edit this field, the directions are the same as listed under "Action Items".

Institutional Effectiveness (IE) Detail

IE Detail items to check for accuracy or update:

- > Progress
- Responsible Roles
- Administrative Support Services
- Academic and Student Support Services
- > Research
- Community and Public Service
- Institutional Effectiveness Report Complete
- To open the IE Detail item, click on the blue hyperlinked name, then click the "Edit" tab.
- Select the appropriate option from the Progress field drop down menu, if uncertain, "Ongoing" is fine, or verify the option selected is accurate.
- Assign a Responsible Role (directions are the same as for the Mission section).
- For the *Administrative Support Services* section, verify the information in the system is accurate or make revisions.
 - To make revisions, click the grey "Edit" button under the "Research" title.
 - Make changes then click the blue "Update" button.
- For the *Academic and Student Support Services* section, verify the information in the system is accurate or make revisions.
 - To make revisions, click the grey "Edit" button under the "Research" title.
 - Make changes then click the blue "Update" button.
- For the *Research* section, verify the information in the system is accurate or make revisions.
 - To make revisions, click the grey "Edit" button under the "Research" title.
 - Make changes then click the blue "Update" button.
- For the *Community and Public Service* section, verify the information in the system is accurate or make revisions.
 - To make revisions, click the grey "Edit" button under the "Research" title.
 - Make changes then click the blue "Update" button.
- For the *Assessment Oversight*, verify the information in the system is accurate or make revisions.
 - To make revisions, click the grey "Edit" button under the "Assessment Oversight" title.
 - Make changes then click the blue "Update" button".

****Very Important!** Once all the sections of the Mission, Unit/College Goals, and IE detail have been verified or edited, be sure to check the box in the IE detail to the right of "Institutional Effectiveness Report Complete". Then click "Save & Close".



• This will indicate the IE Planning is done and ready for review. If you make all the changes and fail to check that box, the unit/college will come up on a report generated by Institutional Assessment indicating the IE Plan is not completed.

Checklist

- Be sure appropriate Progress option is selected for Mission, Unit/College Goals, and IE Detail.
- Ensure the Responsible Role is completed for all items: Mission, Unit/College Goals, and IE Detail.
- Update the Number field in Goals.
- Check the box to indicate Academic Assessment Plan Entry Complete.

Resources

	Effectiveness Reports	Institutional Effectiveness Plans			
Academic year	Due date	Academic year	Due date*		
2015-16	October 14, 2016	2016-17	July 29, 2016		
2016-17	October 13, 2017	2017-18	July 28, 2017		
2017-18	October 12, 2018	2019-20	July 27, 2018		
2018-19	October 11, 2019	2019-20	July 26, 2019		

Reporting and Planning Calendar

*Plans for the next academic year may be submitted any time after the data report due date.

- http://assessment.aa.ufl.edu/academic-assessment
- Institutional Assessment 273-1090 or <u>assessment@aa.ufl.edu</u>