

Unit Planner (Unit Action Plan Manager) – Version 2.7

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Introduction

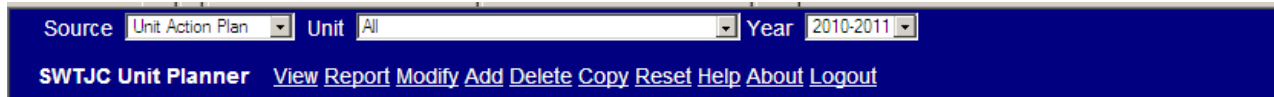
The purpose of the Unit Planner is to document planning for college instructional and service units. The UAP (UAP) documents activities intended to improve student learning and success. Instructional and service units analyze assessment data, record the data, and then develop UAP's to address areas needing improvement.

Navigating the Unit Planner Screen

After logging in, two distinct screen areas appear. At the top is a blue band containing selectable options and tasks. Below it is a much larger work area where information from a database will be managed.

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In the upper part of the blue band are three dropdown lists to select the UAP to be managed. In the lower part of the blue band are links to a variety of management tasks associated to the selected UAP.



Source Unit Year

SWTJC Unit Planner [View](#) [Report](#) [Modify](#) [Add](#) [Delete](#) [Copy](#) [Reset](#) [Help](#) [About](#) [Logout](#)

Management Tasks

Management tasks include:

"View" Task

The "View" task can be clicked anytime to display a summary of UAP's based on the following dropdown selections:

<u>Source</u>	<u>Unit</u>	<u>Year</u>	<u>Summary Selection</u>
No matter	All	All	A unit or year must be selected.
No Matter	All	A year	Summaries of all UAP's for the selected year sorted by unit name.
No matter	A unit	All	Summaries of the selected unit's UAP for all years sorted by year.
No matter	A unit	A year	Summary of the unit's UAP for the selected year.

In each summary, click the "View Plan" link to display a complete UAP. To print a UAP, right click in any part of the displayed UAP, click "Print...", and follow directions.

"Report" Task

The "Report" task is used to display more printer friendly reports including the following:

1. UAP Status Report – This report is available only when the source is "All" units and a specific year is selected. Each line of the report contains the following information:

1. The units name
2. The individual's name who is the submitter of the UAP
3. The individual's name who is the reviewer of the UAP
4. The individual's name who is the approver of the UAP
5. The UAP's Status
 - a. Plan – UAP is in the planning stage

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- b. Implement – UAP is in the implementation stage
- c. Report – UAP is in the reporting stage
- d. Closeout – UAP is being closed out
- e. Complete – UAP is completed

See Appendix A for more detailed.

2. UAP Summary by Instructional Program Outcome¹ – Provides a report of UAP summaries by program outcome.
3. UAP Summary by Instructional Program Outcome (Unfinished) - Provides a report of unfinished UAP's by program outcome. This report is only available at security level 3 and above.
4. UAP Summary by Service Key Function - Provides a report of UAP's by service key function.
5. UAP Summary by Service Key Function - Provides a report of unfinished UAP's by service key function. This report is only available at security level 3 and above.
6. Provides a report of UAP's that have planning outcomes related to one of the following:
 1. QEP – Quality Enhancement Plan
 2. Improvement Strategies
 3. Professional Development
 4. Program Review

"Modify" Task

The "Modify" task can be clicked to modify a UAP or one of its planning outcomes. Use the "Unit" and "Year" selection to narrow UAP choices. The "Modify" task is only available at security level 3 and above.

"Add" Task

The "Add" task can be clicked to add a UAP or planning outcome to an existing UAP. Use the "Unit" and "Year" selection to narrow UAP choices. The "Add" task is only available at security level 3 and above.

"Delete" Task

¹ Program outcome as used here refers to a specific student learning outcome expected upon completion of the program. Similarly, course outcome refers to a specific student learning outcome expected upon completion of the course.

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The "Delete" task can be clicked to delete an entire UAP or one of its outcomes. Use the "Unit" and "Year" selection to narrow UAP choices. The "Delete" task is only available at security level 3 and above.

"Copy" Task

The "Copy" task can be clicked to copy an existing source item. When a UAP is copied, the header record only is copied (no planning outcomes). When a "Planning Outcome" is copied, an existing planning outcome is copied to the UAP. In both cases, a selection of all of the unit's existing UAP's and planning outcomes is presented from which to choose. The "Copy" task is only available at security level 5 and above.

"Help" Task

The "Help" task provides a brief summary of the basic features of the Institution Manager.

"Reset" Task

The "Reset" task provides resets status back to "Plan" essentially restarting the UAP. The "Reset" task is only available at security level 5 and above.

"Logout" Task

Always log out when all work is done.

Unit Action Plan Structure

Each UAP consists of a header record and one or more planning outcomes. Each planning outcome is directed toward an improvement in student learning or success. To manage a UAP, select a source item from the dropdown list. Source items include the following:

[Planning "Header" Record](#)

[Planning Outcome](#)

Planning "Header" Record

Each UAP contains one "header" record to which one or more "planning outcome" records is added. The planning header record consists of these items:

1. "Start Date" – Enter ***the starting date of the UAP.***
2. "End Date" – Enter ***the ending date of the UAP.***
3. "Unit Purpose" – ***Enter the purpose statement of the unit.***

Important Note: (1) each unit should have a purpose statement that answers in general terms two questions: (a) What the unit does? (b) Whom the unit serves? (2) When the UAP is first opened, a default purpose should appear. This default purpose is entered using the Institution

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Manager. Consult the planning unit section of the Institution Manager Documentation section "Planning Units" for more information.

4. "Submitted" –*Select from the dropdown list the individual who will be responsible for preparing and submitting the UAP.*
5. "Review" –*Select from the dropdown list the individual who will be responsible for reviewing the UAP, usually the unit's supervisor.*
6. "Approved" –*Select from the dropdown list the individual who will officially approve the UAP and associated budget.*

To add a header record:

- Step 1. Launch Unit Planner and log in.
- Step 2. Select as source "Unit Action Plan".
- Step 3. Select a planning unit.
- Step 4. Select a planning year.
- Step 5. Click "Add" task.
- Step 6. Enter the required information.
- Step 7. Click "Add New UAP" when done.
- Step 8. Log out when all work is completed.

To modify a header record:

- Step 1. Launch Unit Planner and log in.
- Step 2. Select as source "Unit Action Plan".
- Step 3. Select a planning unit.
- Step 4. Select a planning year.
- Step 5. Click "Modify" task.
- Step 6. Make any changes.
- Step 7. Click "Save Unit Action Plan" when done.
- Step 8. Log out when all work is completed.

To delete a header record:

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- Step 1. Launch Unit Planner and log in.
- Step 2. Select as source “Unit Action Plan”.
- Step 3. Select a planning unit.
- Step 4. Select a planning year.
- Step 5. Click "Delete" task.
- Step 6. Confirm the UAP to delete.
- Step 7. Click "Delete Existing Unit Action Plan and Associated Outcomes" when done.
- Step 8. Log out when all work is completed.

Planning Outcome

Each UAP consists of planning outcome records that represent the desired result of an improvement strategy by the unit to improve some aspect of student learning.² The planning header record consists of these items:

1. “Outcome Number” – ***Enter a sequencing number for the outcome.***
Important Note: In lists and reports, outcomes will be sorted in this order.
2. “Planning Outcome” – ***Enter the planning outcome.***
Important Note: The “Planning Outcome” is a clear and concise statement that describes the expected result after the improvement strategy (intervention, treatment, activity, etc.) is implemented. The term “outcome” is used to emphasize that, like program and course outcomes; the “planning outcome” must be worded in such a way that it is observable and measurable at the end of the planning period. This can be best accomplished by choosing an action verb whose object is that which is to be improved.
3. “Outcome Rationale” – ***Enter the outcome rationale.***
Important Note: To help set the stage for implementation and gather buy-in, it is good idea to provide background information for the outcome. Include a review of assessment data that indicated improvement was needed and any other consideration in selecting the improvement strategy (intervention, treatment, activity, etc.) to be employed.
4. “Mission Link” – ***Select a link to the college's mission from the dropdown list.***
Important Note: The planning outcome should link to the accomplishment of one of the components of the college’s mission.
5. “Goal Link” – ***Select a link to the college's goals from the dropdown list.***
Important Note: College's generally have a set of general, long-term goals, often stated

² While service units may not engage directly in teaching, they certainly affect student learning at least indirectly.

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explicitly, or implied in a vision statement. These are in contrast to strategic goals that are usually more specific and shorter termed. The planning out should link to the accomplishment of the college's visionary goals.

6. “Strategic Goal Link” – *Select a strategic goal link from the dropdown list.*
Important Note: *College planning usually addresses goals connected with a strategic plan. In some cases, the planning outcome may link to accomplishment of a strategic goal. If so, select the strategic goal to which it links here..*

7. “Planning Type” – *Select a planning type.*
Important Note: *Typically, planning outcomes fall into one of two planning types; namely, “Instructional” or “Operational”. Additional types can be configured using the “Institutional Manager”. Consult the Institution Manager Documentation section “Planning Types” for more information. Improved student learning is generally the focus of planning, in which case, the planning outcome is “Instructional”. “Operational” planning may or may not directly affect improvement of student learning. Nevertheless, many colleges believe it good practice to conduct and document operational planning. For reporting purposes, however, it is best to distinguish between the two types.*

8. “Program Link” (Instructional Units only) – *Select a program link from the dropdown.*
Important Note: *Instructional units usually associate planning for improvement of student learning with a specific instructional program. More specifically, planning should focus on improvement of program and course level outcomes. See below.*

9. “Program Outcome Link” (Instructional Units only) – *Select a program outcome from the dropdown list.*
Important Note: *The “Program Link” above is further refined by directing it towards the program outcome needing improvement.*

“Course Outcome Links” (Instructional Units only) – Use the “>>” and “<<” buttons to populate the right “Target Course Outcomes” box with linked course outcomes.
Important Note: *In actual practice, learning improvement strategies (interventions, treatments, activity, etc.) are implemented at the course level. Therefore, they should link to particular course outcomes. Identifying the courses and course outcomes linked to program outcomes is best accomplished using curricular mapping techniques. See for example [Curriculum Mapping](#). The “Course Outcome Choices” that appear in the left box are chosen using the “Institution Manager”. Consult the Institution Manager Documentation section “Course Outcome Links to Program Outcomes” for more information.*

10. “Function Link” (Service Units only) – *Select a key function link from the dropdown list for this planning outcome.*
Important Note: *Service units perform key functions that affect student learning. Each key function is accomplished by carrying out internal “processes”. Key functions are routinely assessed and the results recorded using the “Functions Manager”. Based on these results,*

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certain key functions are chosen for improvement strategies (interventions, treatments, activity, etc.). Key functions are chosen using the “Institution Manager.” Consult the Institution Manager Documentation section “Service Key Functions” for more information.

11. “Assessment Focus Link” – *Select the assessment focus that was the basis for choosing the key function.*

Important Note: Instructional assessment always focuses on student learning, so there is no need to distinguish between focus types or links. Service assessment, on the other hand, can focus vary widely. A typical set of focus links might consist of (1) efficiency, (2) effectiveness, (3) student satisfaction, and (4) impact. Additional institution wide and unit-specific focus links are configurable using the “Institution Manager”. Consult the Institution Manager Documentation section “Assessment Focus” for more information.

12. “Target Process Links” (Service Units only) – *Check all processes with its associated focus to be added.*

Important Note: Processes are service related activities that actually accomplish the key functions. Therefore, the improvement strategy (intervention, treatment, activity, etc.) will generally be directed to one or more processes. The processes for each key function are chosen in the “Institution Manager”. Consult the Institution Manager Documentation section “Service Key Function Process” for more information.

13. “Other Links” – *Optionally check one or more other link.*

Important Note: Up to eight other links are configurable using the “Institution Manager”. Consult the Institution Manager Documentation section “Planning Other Links” for more information. If checked, these links become subject to queries and reports that focus on specific aspects of college planning. For instance, suppose the “General Education” link is checked for all planning outcomes that influence the College’s “General Education Core”. Later, a query and report could be generated that shows college planning related to the “General Education Core”.

14. “Intervention/Treatment/Activity”³ – *Enter the improvement strategy (intervention, treatment, activity, etc.)*

Important Note: Include a brief description of the improvement strategy (intervention, treatment, activity, etc.) to be undertaken. It should answer the “Who?”, “What?”, “When?”, “Where?” questions related to the improvement strategy.

15. “Assessment Method” – *Enter the assessment method.*

Important Note: Explain the assessment method that will be used to determine whether the planning outcome was achieved. Choosing an assessment method is greatly simplified provided the “Planning Outcome” is stated in an observable and measurable way.

³ The label used for the planning strategy is configurable as a system option.

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16. “Assessment Criteria” and associated data – *Enter up to ten assessment criteria along with the associated “Beginning” and “Target” data values. At the end of the planning period, enter the “Ending” data value.*

Important Note: (1) *The assessment method above should be based on collecting and interpreting assessment data. Up to ten different criteria can be used with a brief description entered in the first blank of each line. Include the measurement unit of the data enclosed in braces (e.g. { % mastery } or { students }). The measurement unit will appear after each data item when a report is generated. Only the enclosed text will appear in reports. The data associated with each line includes a “Beginning” value, a “Target” value, and an “Ending” value. The “Beginning” value is the value at the start of the planning period. The “Target” value is the desired value to be achieved by the end of the planning period. The “Ending” value is the actual value at the end of the planning period. Data must be numeric (i.e., digits 0-9 and optionally the decimal point). (2) If appropriate program and course outcome assessment data is available the first criteria lines will automatically populate with information and data. In this case, additional assessment criteria should be entered in the empty blanks below.*⁴

17. “Start Date” and “End Date” – *Enter the planned improvement strategy “Start Date” and “End Date”.*

Important Note: *Generally, the starting and ending dates of the planned improvement strategy will be the same as that of the UAP and are defaulted thusly. If the dates are different, one or both can be changed.*

18. “Personnel Cost” and “Personnel Cost Description” – *If implementing the planning strategy (intervention, treatment, activity, etc.) will involve personnel costs, enter a brief description of the personnel requirement and the estimated cost.*

Important Note: *This budget information should be available for review and possible approval during the college’s regular budget cycle.*

19. “Equipment Cost” and “Equipment Cost Description” – *If implementing the planning strategy (intervention, treatment, activity, etc.) will involve equipment costs, enter a brief description of the equipment specifications and the estimated cost.*

Important Note: *This budget information should be available for review and possible approval during the college’s regular budget cycle.*

20. “Other Cost” and “Other Cost Description” – *If implementing the planning strategy (intervention, treatment, activity, etc.) will involve other costs, enter a brief description of other requirements and the estimated cost.*

⁴ Reserving the first lines for program and course outcome links is done because it is presumed that improved learning is best demonstrated at the program and course level. The additional criteria focus more directly on whether the planning outcome itself was accomplished. A similar argument can be made for key function and processes on the services side.

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Important Note: *This budget information should be available for review and possible approval during the college's regular budget cycle.*

21. "Current Budget" and "Additional Budget" – **Enter amounts from the current unit's budget and any additional budget required to cover the costs above.**

Important Note: *The cost of implementing the planning strategy (intervention, treatment, activity, etc.) can be split between the current unit's budget and another source (e.g. a grant). The sum of "Current Budget" and "Additional Budget" must equal the total cost.*

22. "Findings" – **At the end of the planned improvement strategy period, enter a description of what happened and the findings (results and conclusions).**

Important Note: *Refer whenever possible to "Ending Data" criteria to support the findings.*

23. "Actions Taken/Changes" – **At the end of the planned improvement strategy period, enter a description of actions taken and/or changes that have affected learning within the unit, especially those with long term effects.**

24. "Individual Responsible" – **Enter the name of the individual primarily responsible for carrying out the planning outcome.**

To add a planning outcome:

- Step 1. Launch WW Unit Planner and log in.
- Step 2. Select "Planning Outcome" as source.
- Step 3. Select the planning unit.
- Step 4. Select the planning year.
- Step 5. Click "Add" task.
- Step 6. Answer the question "What is the purpose of the planning outcome?" by either clicking one of the two choices:
- a. Improved student learning? (E.g. increased mastery of program, course, and other learning outcomes) This choice generates "instructional" outcome type.
 - b. Improved student success? (E.g. increased graduation rates, course completion, retention, etc.) This choice generates "operational" outcome type.
- Step 7. (Improved student learning choice only) Select a program and a program outcome that will that will link to the planning outcome.
- Step 8. Enter the required information.

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Step 9. Click "Save Planning Outcome" when done.

Step 10. Log out when all work is completed.

To modify a planning outcome:

Step 1. Launch WW Unit Planner and log in.

Step 2. Select "Planning Outcome" as source.

Step 3. Select the planning unit.

Step 4. Select the planning year.

Step 5. Click "Modify" task.

Step 6. Click to planning outcome to modify.

Step 7. Make any changes.

Step 8. Click "Save Planning Outcome" when done.

Step 9. Log out when all work is completed.

To delete a planning outcome:

Step 1. Launch WW Unit Planner and log in.

Step 2. Select "Planning Outcome" as source.

Step 3. Select the planning unit.

Step 4. Select the planning year.

Step 5. Click "Delete" task.

Step 6. Click to select a planning outcome to delete.

Step 7. Confirm the planning outcome to delete.

Step 8. Click "Delete Existing Planning Outcome" when confirmed.

Step 9. Log out when all work is completed.

Once created, a planning outcome record can be changed by selecting the "Modify" task. Once created many of the management tasks can be conveniently accomplished by merely viewing the plan. If the submitter, reviewer, or approver is logged-in, check boxes, e-mail links, and comment blocks are provided to permit managing and communicating with others who are involved with the UAP. If "All" units and a particular year is selected, the "Report" task shows a special summary report that includes

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“red dots” to indicate that attention is required by the submitter, reviewer, and/or approver of the UAP. Progress of the UAP can be monitored by referring to the "Status" column. When the status is "Complete", all management items disappear producing a “clean” report suitable for printing. Appendices A and B provide more detail.

Important Note: Changing data from previous, “locked” years may be restricted. Consult the Institution Manager Documentation section “Years” for more information.

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Appendix A – Status Reporting and UAP Monitoring

The institutional effectiveness (IE) cycle differs depending on whether the focus is student learning or student success. Student learning generally refers to mastery of program and course learning outcomes. Student success, on the other hand, relates to administrative and departmental success criteria such as graduation rate, course completion, retention, etc. The stages of the IE cycle for each are given below.

I. UAP Stages for Student Learning

1. Assess learning outcomes
2. Review assessment data from previous year for needed improvements
3. Plan UAP to address improvements
4. Implement UAP
5. Reassess learning outcomes
6. Review UAP in light of new assessment data and document results
7. Based on UAP results, document actions taken and changes made
8. Repeat activities 2 to 7

II. UAP Stages for Student Success

1. Assess success criteria
2. Review assessment data from previous year for needed improvements
3. Plan UAP to address improvements
4. Implement UAP
5. Reassess success criteria
6. Review UAP in light of new assessment data and document results
7. Based on UAP results, document actions taken and changes made
8. Repeat activities 2 to 7


The repeating of stages 2 to 7 establishes the cyclic nature of IE. Stage 7 is commonly referred to as "closing the loop". While the IE cycle usually repeats once each year, improvement strategies may require two or more years to achieve a measurable effect. For this reason, planning outcomes often extend to multiple years. Because of the complexity of IE processes and activities, some overlapping of stages is likely to occur. Nevertheless, target dates for each stage should be set and adhered to as much as possible.

























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Appendix A – Status Reporting and UAP Monitoring


Operation of the Unit Planner is designed around three individuals: the *submitter* who develops and submits the UAP; the *reviewer* who reviews the submitted UAP and assists the submitter in developing a good UAP; and the *approver* who reviews the UAP and ultimately approves the budget and UAP. They do not have to be three distinct individuals; for instance in a small college, the reviewer and approver could be the same individual. The IE cycle is incorporated in the Unit Planner in such a way that the three individuals are guided through the process. The UAP Status Report provides a quick way to see the status of each unit's UAP during its IE cycle. It also indicates the individual whose attention is needed at any given time. UAP status points follow the IE cycle and are designated as *plan*, *implement*, *report*, *closeout*, and *complete*. To see the Status Report for a given year, select the source "Unit Action Plan", select the unit "All", and select the desired year. Click the "Report" task and select "UAP Status Report". Below is an example.

Select an Unit Action Plan Report for 2011 - 2012

Click Link to See Report  Click to Apply Filter Planning Unit has No Planning Outcomes  Attention Needed
Click symbol to apply filter

Planning Unit	Submitted By January 1, 2011	Reviewed By February 1, 2011	Approved By March 1, 2011	Status
Accounting <small>No Outcomes</small>	 T. Driskill 	C. Buchanan 	H. Gonzales 	Plan
Administrative Information Technology	 B. Herndon 	C. Buchanan 	H. Gonzales 	Plan
Air-Conditioning-Refrigeration Technology	 R. Flores 	J. Garcia 	H. Gonzales 	Plan
Automotive Body Repair Technology	 J. Zamarripa 	J. Garcia 	H. Gonzales 	Plan
Automotive Technology	 J. Garcia 	J. Garcia 	H. Gonzales 	Plan
Biologav	 R. Knenin 	J. Swink 	H. Gonzales 	Plan

The information provided for each planning unit includes:

1. The planning unit's name which is also a link to view the UAP (See Appendix B)
2. The submitter, reviewer, and approver
3. The status (plan, implement, report, closeout, complete)
4. A reddish background indicating the UAP has no planning outcomes
5. A red dot indicating attention is needed by the individual named
6. Clicking on the filter symbol  beside a name removes all other individuals from the column
7. Click on the "Remove Filter" button that appears after filtering to remove the filter
8. Hovering over the status gives more detailed status information
9. Clicking on the planning unit name views the UAP (same as choosing the "View" task and clicking "View Plan")

More detail of the IE cycle chronology, the status at various stages, and individual responsibilities is given below.

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Appendix A – Status Reporting and UAP Monitoring

1. "Plan" Status – UAP is developed and approved for implementation.

a. Submitter develops UAP using the "Add", "Copy", and "Modify" tasks

Engineering (FOS)	R. Whipple	J. Swink	H. Gonzales	Plan
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b. Reviewer reviews UAP using the "Report" or "View" task (see Appendix B)

Engineering (FOS)	R. Whipple	J. Swink	H. Gonzales	Plan
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c. Approver approves budget and UAP using the "Report" or "View" task (see Appendix B)

Engineering (FOS)	R. Whipple	J. Swink	H. Gonzales	Plan
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2. "Implement" Status – UAP is implemented

Engineering (FOS)	R. Whipple	J. Swink	H. Gonzales	Implement
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3. "Report" Status – After UAP is implemented and end date past, submitter

a. Updates measures in success criteria using the "Modify" task

b. Updates "Findings/Results" using the "Modify" or "View" task

c. Updates "Actions Taken/Changes" using the "Modify" or "View" task

Engineering (FOS)	R. Whipple	J. Swink	H. Gonzales	Report
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4. "Closeout" Status – After report finished, reviewer reviews and edits as necessary the following using the "Report" or "View" task:

a. "Findings/Results" for each outcome

b. "Actions Taken/Changes" for each outcome

c. Answers success criteria questions for each outcome including

i. Was the desired planning outcome achieved?

ii. Did it result in improved student learning?

iii. Did it result in improved student success?

Engineering (FOS)	R. Whipple	J. Swink	H. Gonzales	Closeout
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5. "Complete" Status – The UAP's IE cycle is complete.

Engineering (FOS)	R. Whipple <small>Submitter</small>	J. Swink	H. Gonzales	Complete
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Appendix B – Using the "View" Task Special Features

During the development, implementation, reporting, and closeout stages of the UAP, the unit's submitter, reviewer, and approver can access and change certain information with the "View" task rather than the "Modify" task. In addition, completion of a stage can be indicated and an e-mail sent to the individual whose attention will then be needed. To use "View" task in this manner, the submitter, reviewer, or approver logs in; sets the source to "Unit Action Plan", the unit to be viewed, and the year; then clicks "View Plan" in the displayed UAP summary. The reviewer and approver, who may be responsible for several units, may prefer to use the "UAP Status Report" because it provides better access to all UAP's. See Appendix A for a detailed explanation. If the UAP needs attention by the individual logged-in, appropriate editing and emailing options will be available. When the UAP's status is "Complete", all editing and emailing options disappear and a printable version of the UAP is displayed. To print a copy, right click anywhere in the displayed UAP, click the "Print..." option, and follow instructions.

The following example follows a fictitious UAP through various stages to illustrate the process and the use of the UAP Status Report and the special "View" task.

Submitter "R. Whipple" develops the Engineering (Field of Study) UAP using the "Add", "Copy", and "Modify" tasks until it is ready to submit for review. The submitter chooses the "View" task, clicks "View Plan", and checks the "Submitted By" checkbox.

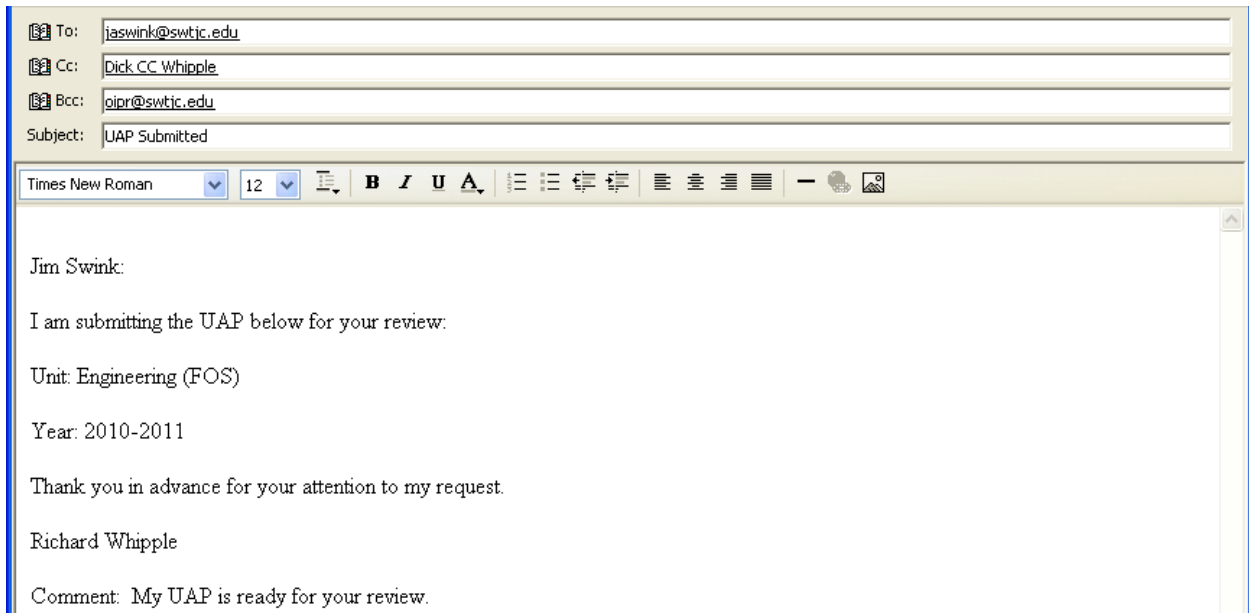
The screenshot displays the 'View Plan' interface for a Unit Action Plan (UAP) at Southwest Texas Junior College. The interface is titled 'Southwest Texas Junior College Engineering (FOS) Unit Action Plan for 2010 - 2011'. The 'Source' is set to 'Unit Action Plan', the 'Unit' is 'Engineering (FOS)', and the 'Year' is '2010-2011'. The navigation bar includes links for 'View Report', 'Modify', 'Add', 'Delete', 'Copy', 'Help', 'About', and 'Logout'. The main content area shows the 'Unit Purpose' as 'Leading to the Bachelor of Science (BS) with a major in Engineering.' The 'Submitted By' field is checked, and the 'Email Notice' button is visible. The 'Reviewed By', 'Approved By', 'Closeout Ready', and 'Closeout Completed' fields are all set to 'No'. The 'Planning Outcome No. 1' is 'Engineering (FOS) Year: 2010-2011'. The 'Expected Outcome' is 'Students will improve learning related to the Engineering (FOS) program outcome 'Demonstrate an understanding of professional and ethical responsibility''. The interface also shows 'Auto Logout: 15 Min' and 'Local intranet' in the bottom right corner.

Field	Status
Submitted By Richard Whipple	Yes <input checked="" type="checkbox"/> <input type="button" value="Email Notice"/>
Reviewed By Jim Swink	No
Approved By Hector Gonzales	No
Closeout Ready Richard Whipple	No
Closeout Completed Jim Swink	No

The submitter clicks the "Email Notice" button to notify the reviewer "J. Swink" that the UAP is ready for review.

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Appendix B – Using the "View" Task Special Features



A blind copy is sent to the Office of Planning and Research for their records.

After logging in, the reviewer clicks the "Report" task, chooses the UAP Status Report, and then filters the "Reviewed By" column for his name.

Select an Unit Action Plan Report for 2010 - 2011

[Remove Filter](#)

Planning Unit	Submitted By January 1, 2010	Reviewed By February 1, 2010	Approved By March 1, 2010	Status
Biology	J. Swink	J. Swink	H. Gonzales	Plan
Chemistry	J. Garcia	J. Swink	H. Gonzales	Complete
Engineering (FOS)	R. Whipple	J. Swink	H. Gonzales	Plan
Engineering Computers (GS) <small>No Outcomes</small>	R. Whipple	J. Swink	H. Gonzales	Report
Mathematics	P. Kimble	J. Swink	H. Gonzales	Complete
Physics	M. Beth Monroe	J. Swink	H. Gonzales	Report

The reviewer notes that "Engineering (FOS)" UAP is ready for review and clicks on the planning unit's name to "View" it. The reviewer reviews each planning outcome. If the planning outcome is acceptable, the reviewer checks the "Reviewed" check box.

Outcome Reviewed: Yes No Reviewed

Reviewer's Comments:

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If an issue or question exists, the reviewer may provide a comment, save it, and email a notice to the submitter. The email includes the comment, which is also visible to the submitter when the UAP is later viewed.

<i>Outcome Reviewed:</i>	See Comment	<input type="checkbox"/> Reviewed	
<i>Reviewer's Comments:</i>	<div style="border: 1px solid gray; padding: 2px;"> Is one additional program really enough to achieve the improvement desired? </div>	<input type="button" value="Save Comment"/>	Comment saved
		<input type="button" value="Email Notice"/>	

To: jaswink@swtjc.edu

Cc: Dick CC Whipple

Bcc: joipr@swtjc.edu

Subject: UAP Comment Needs Attention

Richard Whipple:

The comment below refers to the following UAP outcome:

Unit: Engineering (FOS)

Year: 2010-2011

Outcome No: 2

In order to complete your UAP, you must log on to the Unit Planner, address the comment, and then resubmit the plan.

I would appreciate you immediate attention to my request.

Jim Swink

Comment:

Is one additional program really enough to achieve the improvement desired?

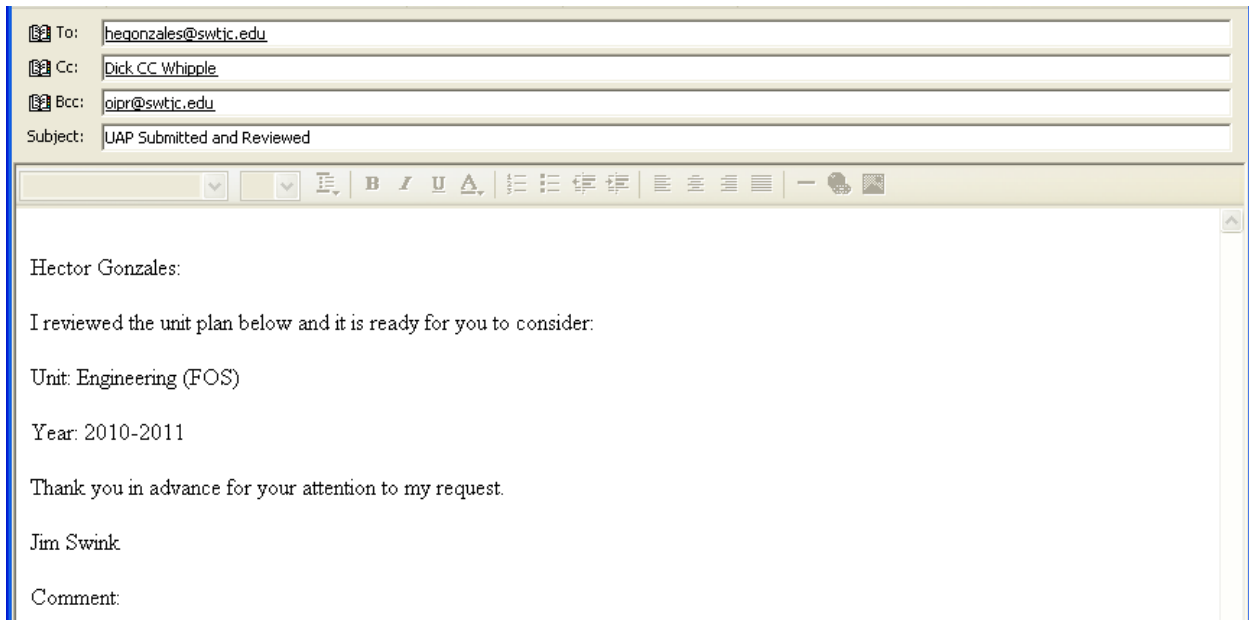
When the reviewer comment is saved, the "Submitted By" checkbox is cleared and attention is returned to the submitter. The submitter considers the comment, confers with the reviewer as necessary, works out a suitable revision, and resubmits the UAP. The reviewer logs-in and checks the review checkbox for planning outcome 2 completing the review.

<i>Submitted By</i> Richard Whipple	Yes		
<i>Reviewed By</i> Jim Swink	Yes	<input type="button" value="Email Notice"/>	
<i>Approved By</i> Hector Gonzales	No		
<i>Closeout Ready</i> Richard Whipple	No		
<i>Closeout Completed</i> Jim Swink	No		

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Appendix B – Using the "View" Task Special Features

Note that when all review check boxes are checked, the "Reviewed By" indicator changes to "Yes". The reviewer clicks the "Email Notice" emailing the approver H. Gonzales that the UAP review has been done and the UAP is ready for budget review and final approval. The email reads as follows:



The approver "H. Gonzales" logs in, gets a "UAP Status Report" for 2010-11, filters the "Approved By" column by his name, and notes the red dot indicating the Engineering FOS UAP needs attention.

Education	● M. Burchfield	T. Tucker	H. Gonzales	Report
Engineering (FOS)	R. Whipple	J. Swink	● H. Gonzales	Plan
Engineering Computers (GS) No Outcomes	● R. Whipple	J. Swink	H. Gonzales	Report
English	● H. Strait	T. Tucker	H. Gonzales	Plan

The status is still "Plan" and will be until the approver has approved all budgets and planning outcomes. The approver clicks on the unit's name and views the UAP. For each planning outcome, the budget and planning outcome must both be approved. A checkbox is provided for each. Similar to the reviewer before, comment boxes are provided should either a budget or planning outcome issue arise. In the example below, the approver indicates an issue with the source of funding.

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Appendix B – Using the "View" Task Special Features

Budget Request:

Personnel: \$ 0 for
Equipment: \$ 0 for
Other: \$ 3000 for Classroom license for MATLAB engineering calculation software. Funds available in CAMSE grant.

Total Cost: \$ 3000 Unit's Budget \$500 Other Funding Source \$2500

Outcome Reviewed: No

Reviewer's Comments: Is one additional program really enough to achieve the improvement desired?

Budget Approved: See Comment Budget OK

Budget Comments: If possible, take the entire \$3000 out of the CAMSE grant and use none of your unit's budget. Comment saved

Outcome Approved: Pending Approved

Approver's Comments:

By saving the comment, both the "Submitted By" and "Reviewed By" check boxes will be cleared, thus requiring the submitter and reviewer to resolve the issue and then retrace submit and review steps as before. By clicking the corresponding "Email Notice" button, the submitter will get the following email:

To: Dick CC Whipple
Cc: jaswink@swtjc.edu
Bcc: oipr@swtjc.edu
Subject: UAP Comment Needs Attention

Richard Whipple:

The comment below refers to the following UAP outcome:

Unit: Engineering (FOS)

Year: 2010-2011

Outcome No: 2

In order to complete your UAP, you must log on to the Unit Planner, address the comment, and then resubmit the plan.

I would appreciate you immediate attention to my request.

Hector Gonzales

Comment:

If possible, take the entire amount out of the CAMSC grant and don't use unit's budget.

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Assuming the budget issue is resolved, the submitter, reviewer, and approver check their respective checkboxes, the UAP Report status changes from "Plan" to "Implement", and attention reverts to the submitter.

Education	<input checked="" type="checkbox"/> M. Burchfield	<input checked="" type="checkbox"/> T. Tucker	<input checked="" type="checkbox"/> H. Gonzales	Implement
Engineering (FOS)	<input checked="" type="checkbox"/> R. Whipple	<input checked="" type="checkbox"/> J. Swink	<input checked="" type="checkbox"/> H. Gonzales	Implement
Engineering Computers (GS) <small>No Outcomes</small>	<input checked="" type="checkbox"/> R. Whipple	<input checked="" type="checkbox"/> J. Swink	<input checked="" type="checkbox"/> H. Gonzales	Implement
English	<input checked="" type="checkbox"/> H. Strait	<input checked="" type="checkbox"/> T. Tucker	<input checked="" type="checkbox"/> H. Gonzales	Plan

The UAP implementation continues through the completion UAP date, after which, the status turns to "Report".

Education	<input checked="" type="checkbox"/> M. Burchfield	<input checked="" type="checkbox"/> T. Tucker	<input checked="" type="checkbox"/> H. Gonzales	Report
Engineering (FOS)	<input checked="" type="checkbox"/> R. Whipple	<input checked="" type="checkbox"/> J. Swink	<input checked="" type="checkbox"/> H. Gonzales	Report
Engineering Computers (GS) <small>No Outcomes</small>	<input checked="" type="checkbox"/> R. Whipple	<input checked="" type="checkbox"/> J. Swink	<input checked="" type="checkbox"/> H. Gonzales	Report
English	<input checked="" type="checkbox"/> H. Strait	<input checked="" type="checkbox"/> T. Tucker	<input checked="" type="checkbox"/> H. Gonzales	Plan

Attention remains with the submitter who completes the "Findings" and "Actions Taken" for each planning outcome.

Findings:	<div style="border: 1px solid gray; padding: 5px; min-height: 40px;"> Due to the change in instructors, the intervention was not carried out as planned. The MATLAB license was purchased and engineering students had the opportunity to program two projects using it. </div>	<input type="button" value="Save Findings"/> Comment saved
Actions Taken/Changes:	<div style="border: 1px solid gray; padding: 5px; min-height: 40px;"> The intervention will be tried again in 2011-2012. MATLAB will be used for all programming projects instead of JAVA as it better meets the needs of engineering students. </div>	<input type="button" value="Save Changes"/> Comment saved

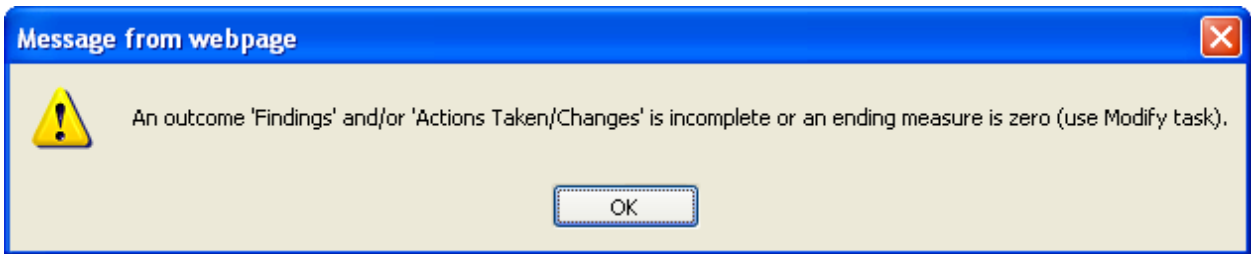
Note that the submitter can enter this information directly in the "View Task" and save it. The submitter appears to be ready to notify the reviewer that the UAP is ready for closeout.

Submitted By	Richard Whipple	Yes
Reviewed By	Jim Swink	Yes
Approved By	Hector Gonzales	Yes
Closeout Ready	Richard Whipple	No <input type="checkbox"/> <input type="button" value="Email Notice"/>
Closeout Completed	Jim Swink	No

However, as the cursor hovers over the "Closeout Ready" checkbox, this warning message appears:

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Appendix B – Using the "View" Task Special Features



As the "Findings" and the "Actions Taken/Changes" are complete, then an ending measure must be zero. Investigating further, the ending measure for planning outcome 2 is noted to be zero by an exclamation point.

Success Criteria:	Measures	Beginning	Target	Ending
	Write and document a computer program.	58%	80%	0%
Start-End Date: 9/1/2010 - 5/1/2011				

Ending measure cannot be zero

Clicking on the exclamation point launches the "Modify" task where the necessary update can be made. Clicking "View" task then "View Plan" after saving the changes, the UAP now reflects the correct ending measure.

Success Criteria:	Measures	Beginning	Target	Ending
	Write and document a computer program.	58%	80%	75%

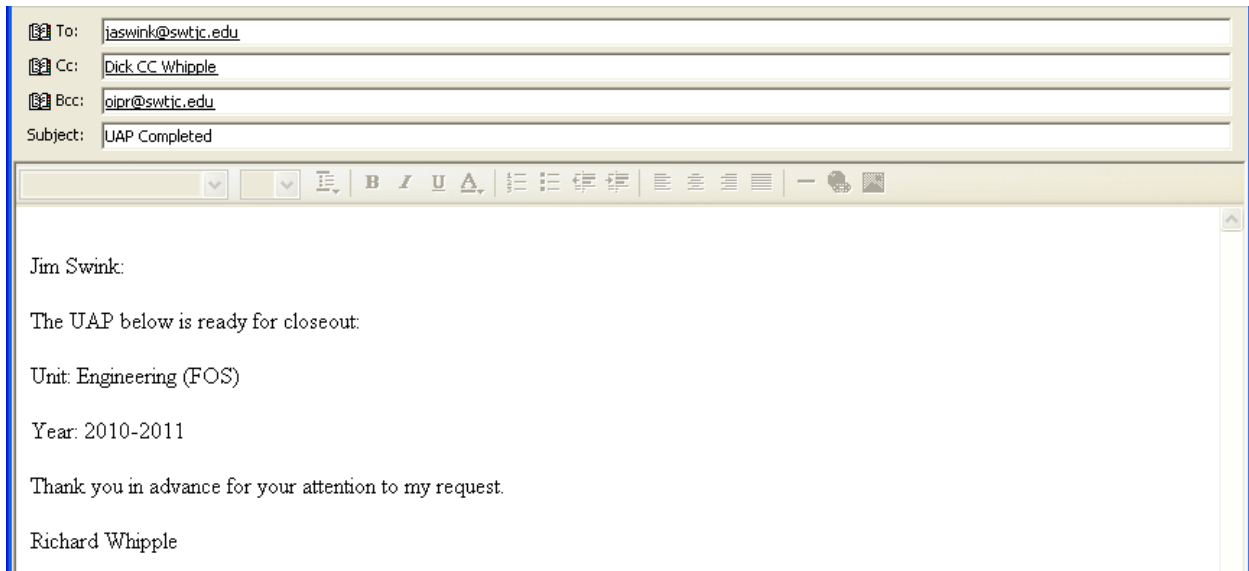
The submitter checks the "Closeout Ready" checkbox.

Submitted By	Richard Whipple	Yes
Reviewed By	Jim Swink	Yes
Approved By	Hector Gonzales	Yes
Closeout Ready	Richard Whipple	Yes <input checked="" type="checkbox"/> <input type="button" value="Email Notice"/>
Closeout Completed	Jim Swink	No

An email notice is sent to the reviewer who is responsible for final closeout of the UAP.

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Appendix B – Using the "View" Task Special Features



The UAP Status Report now shows "Closeout" and attention has shifted to the reviewer.

Education	● M. Burchfield	T. Tucker	H. Gonzales	Report
Engineering (FOS)	● R. Whipple	● J. Swink	H. Gonzales	Closeout
Engineering Computers (GS) <small>No Outcomes</small>	● R. Whipple	J. Swink	H. Gonzales	Report
English	● H. Strait	T. Tucker	H. Gonzales	Plan

During the final closeout, the reviewer's responsibility is to

1. Review the UAP and make any last minute changes to the "Findings" and "Actions Taken/Changes" sections of each planning outcome.
2. Answer the following questions for each planning outcome:
 - a. Was the planning outcome achieved?
 - b. Did the planning outcome result in improved student learning?
 - c. Did the planning outcome result in improved student success?

These items can be completed by viewing the UAP.

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Findings: Additional time was spent discussing the elements of ethical responsibility with apparent improvement in assessment results.

Actions Taken/Changes: The additional time will devoted to ethical subject matter in future.

Outcome achieved: No

Outcome Resulted in Improved Student Learning: No

Outcome Resulted in Improved Student Success: No

With this done, the reviewer checks the "Closeout Completed" checkbox and clicks "Email Notice" button to notify the submitter and approver that the UAP is officially done for the year.

**Southwest Texas Junior College
Engineering (FOS)
Unit Action Plan for 2010 - 2011**

Start Date: 9/1/2010 End Date: 5/31/2011

Unit Purpose: Leading to the Bachelor of Science (BS) with a major in Engineering.

Submitted By Richard Whipple **Yes**

Reviewed By Jim Swink **Yes**

Approved By Hector Gonzales **Yes**

Closeout Ready Richard Whipple **Yes**

Closeout Completed Jim Swink **Yes**

Further viewings of the UAP will no show checkboxes, comments, or buttons. The "clean" UAP is suitable for display and printing.