UNIT PLANNING AND PROGRESS REPORTING GUIDE

Office of Institutional Effectiveness, Accreditation, and Strategic Planning

Director – Shari Peterson PhD, RDH

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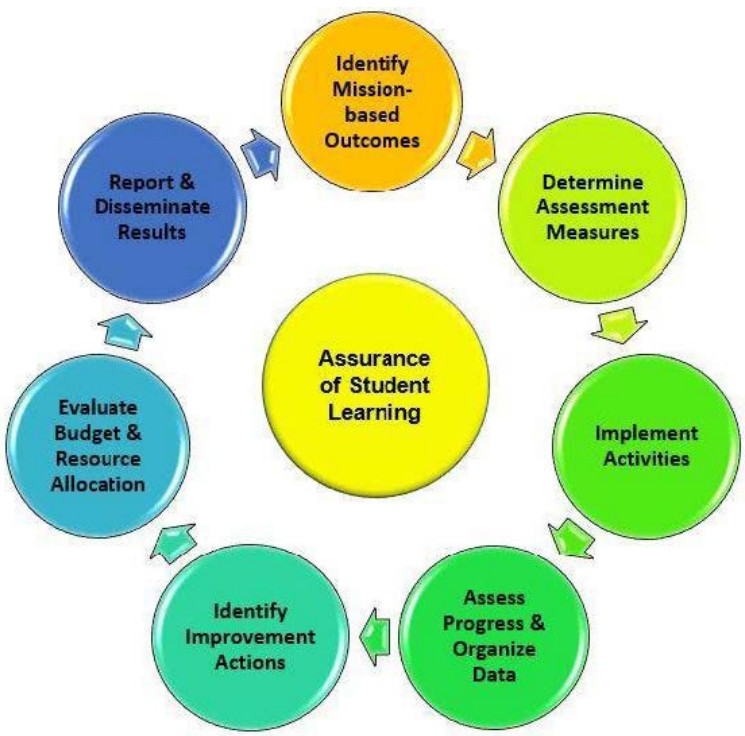

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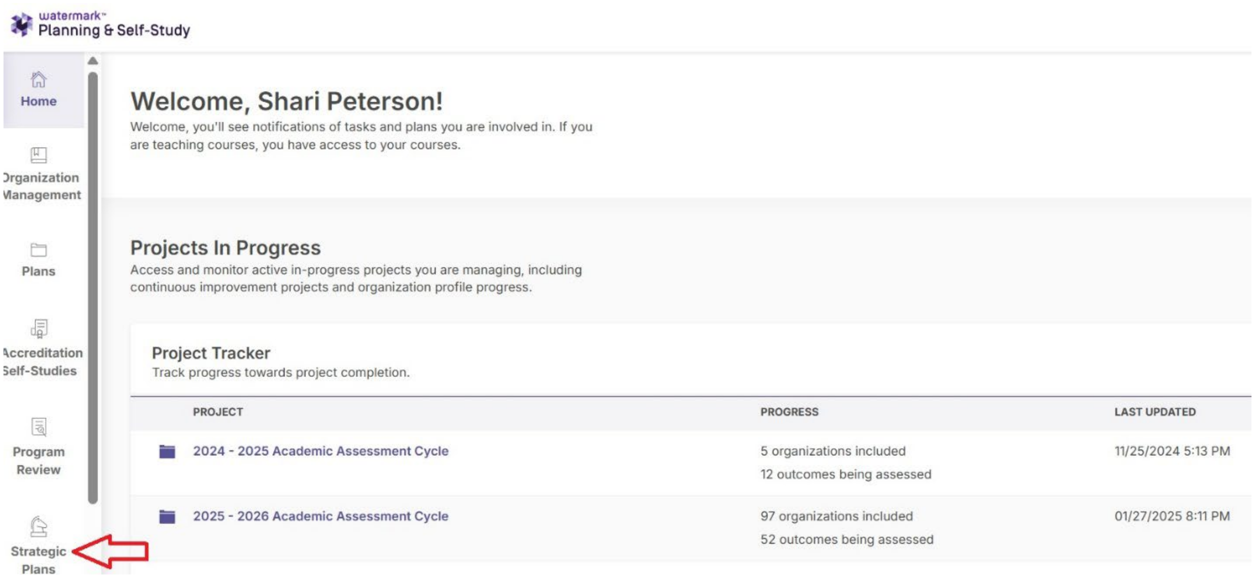
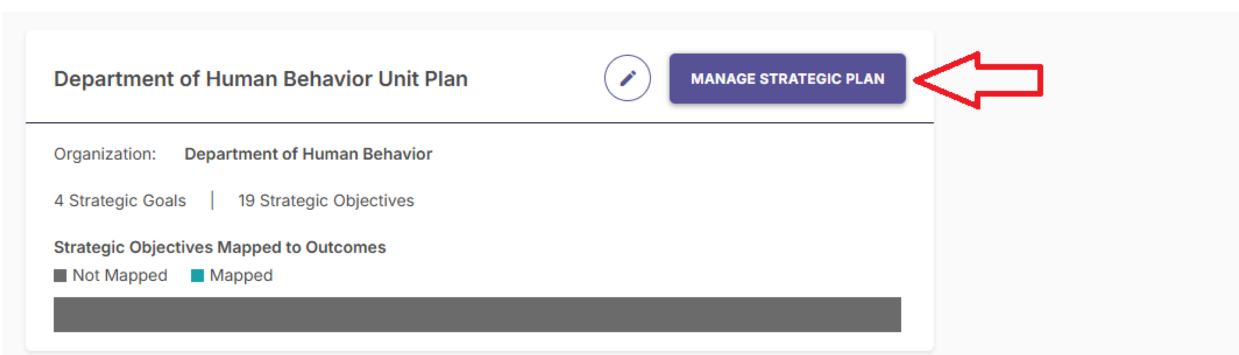
UNIT PLAN CREATION OR REVISION

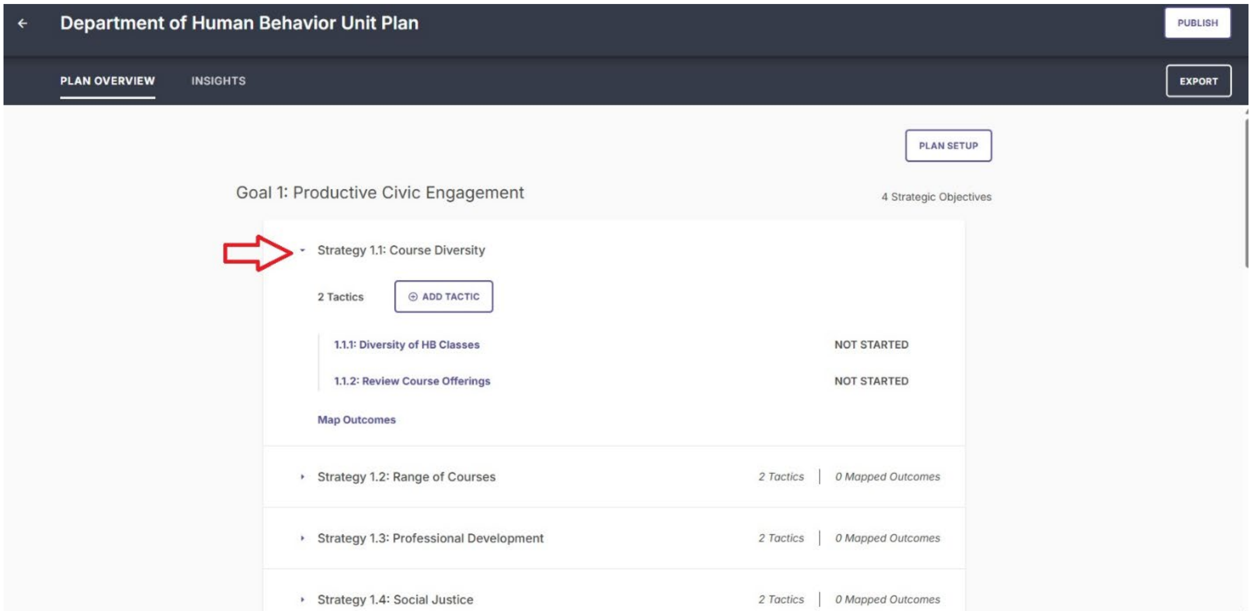
PLEASE REVISE OR CREATE UNIT PLANS JULY 1 – SEPTEMEBR 15 ANNUALLY.
To access Watermark PSS for unit planning, go to the CSN homepage and login to GoCSN. Click on the EMPLOYEE OR EMPLOYEE 2 grouping of tiles and then click on the Watermark PSS tile. This will prompt you through the single sign on process with your CSN email and current CSN password. Once logged in, you will be directed to your workspace home. Click on Strategic Plans in the left-hand navigation column to view you assigned unit plan.



Locate the title of the unit plan you want to view or modify. Please do not edit the established name of the Unit Plan. Please contact the Director of Institutional Effectiveness, Accreditation and Strategic Planning (IEASP) for any unit plan title changes. ***Click on Manage Strategic Plan***.



View: The unit plan Goals and Strategies should be displayed. To view Actions (tactics) ***toggle the down arrow next to each strategy***. You can only view the actions for one strategy at a time.

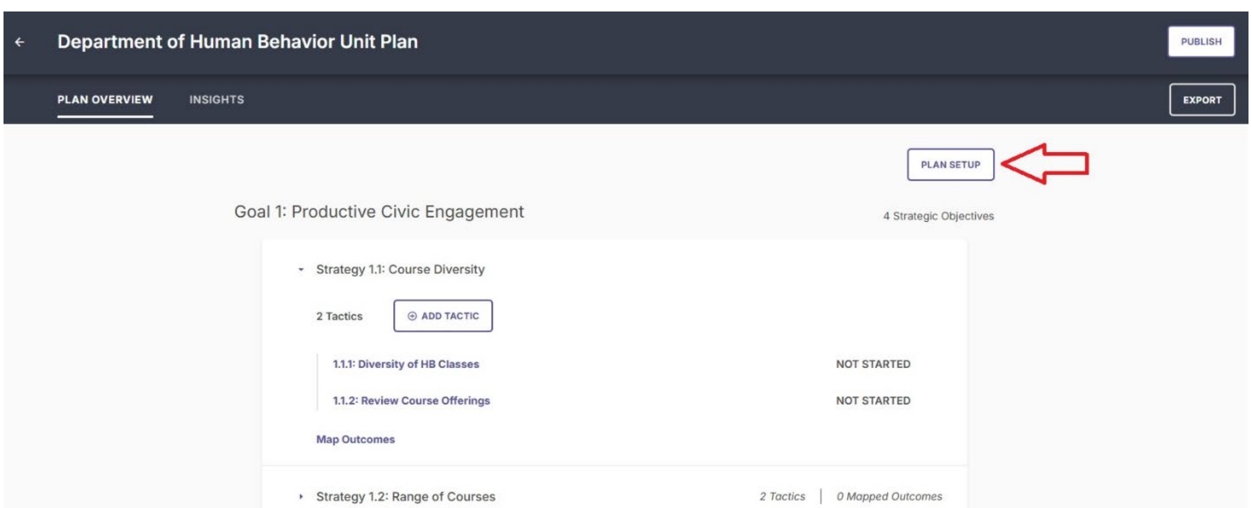


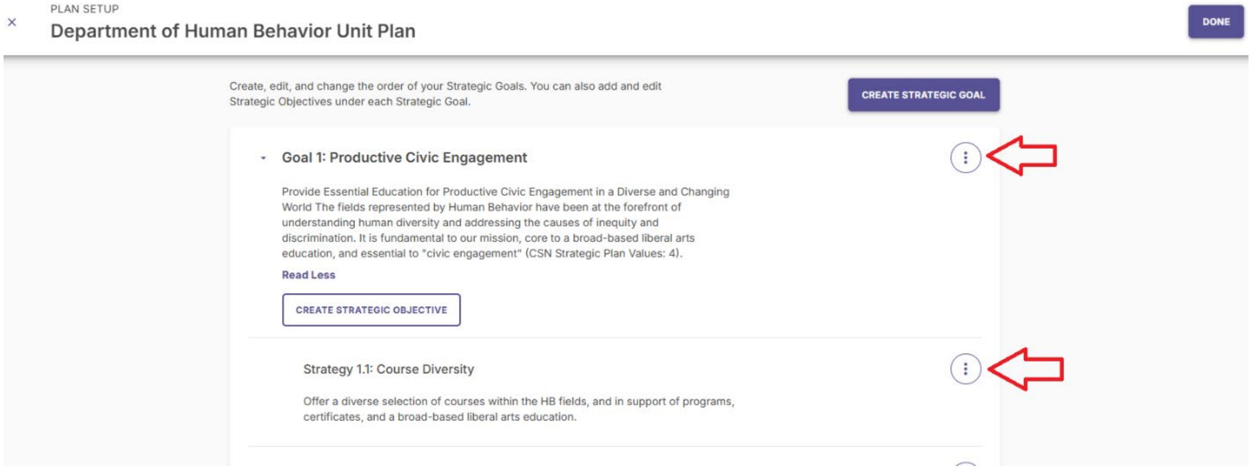
MODIFY OR EDIT EXISTING UNIT PLAN

To edit the existing plan, ***click on Plan Setup***.

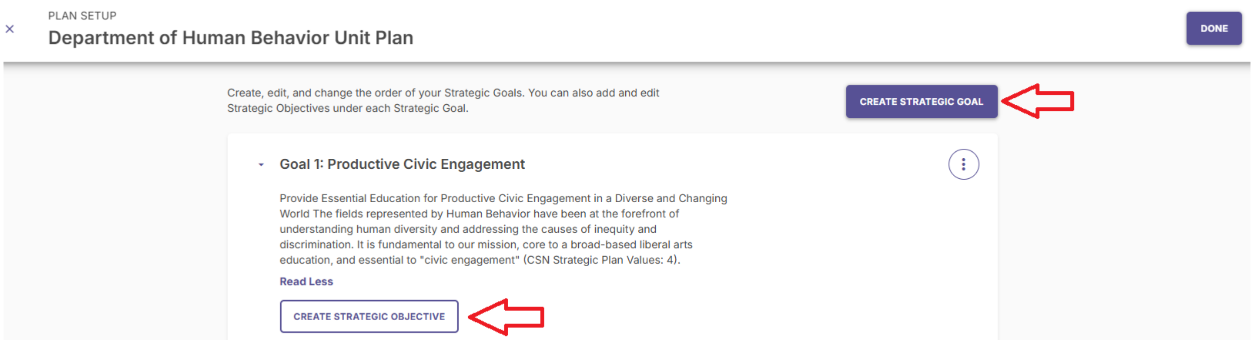
In this mode you will be able to edit existing goals and strategies OR create new goals and strategies. We will continue to use the established numbering hierarchy of Roman numerals for Goals, numeric 1.1 etc. for strategies under a goal, and numeric 1.1.1 etc. for actions under a strategy.

Edit Mode: Most likely you will only need to edit the existing goals and strategies. To do so, ***click on the 3-dot button*** next to the existing goal or strategy and ***select Edit***. Note that you can also delete or move the item up or down within the unit plan.





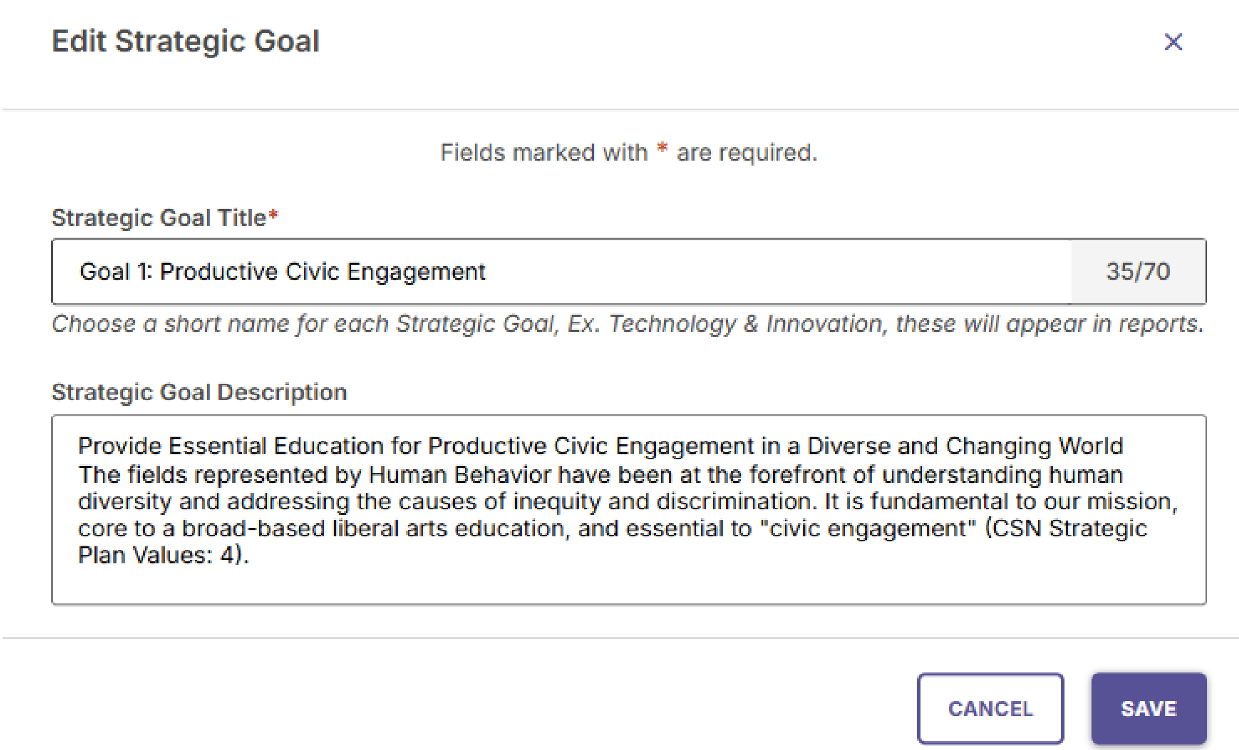
Create Mode: To create a goal, click on ***Create Strategic Goal*** as shown below. Once a goal is created then you can ***create a strategy (Strategic Objective)*** for that goal.



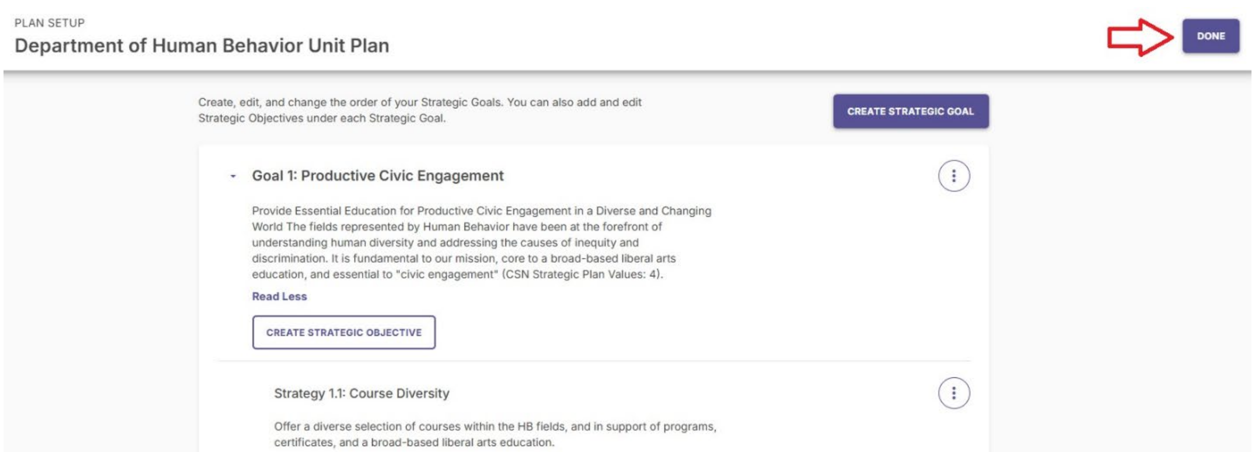
DIRECTIONS FOR CREATING/EDITING GOALS AND STRATEGIES

1. Goals are a long-term directional statement of WHAT your unit is tasked with, a specific charge, your purpose or responsibilities. Goals usually start with a directional verb (Increase, decrease, or maintain). Use the formula (Increase/Decrease [purpose/responsibility] from X to Y by [date]).
2. Strategies are a different approach, intervention, or method indicating HOW you will do something "different" to pursue your goal. Strategies usually start with an action verb that focuses on continuous activity (Promote, advocate, support, enhance, pursue).

Titles - Note 70 character maximum for the title. We suggest three or four summary words.
Description: There are no maximum characters.

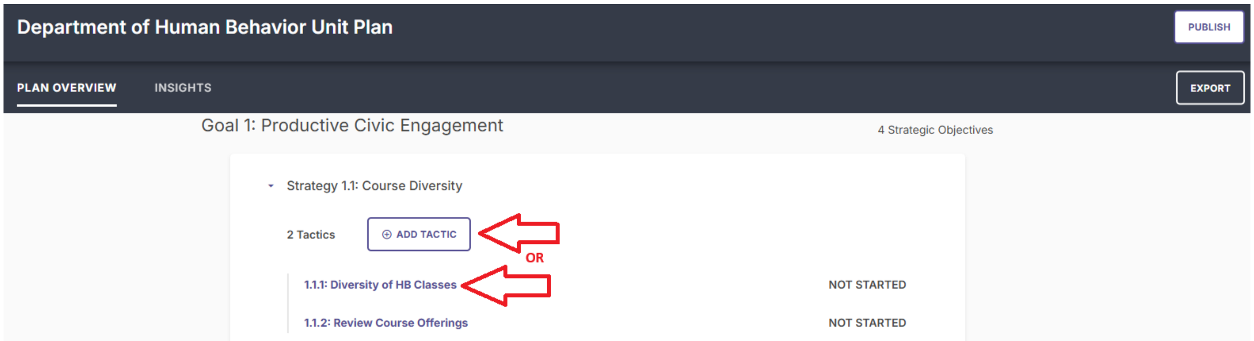


When you are done entering the title and description click Save.
When you have completed all modifications to the unit plan goals and strategies ***click on Done*** in the upper right corner.

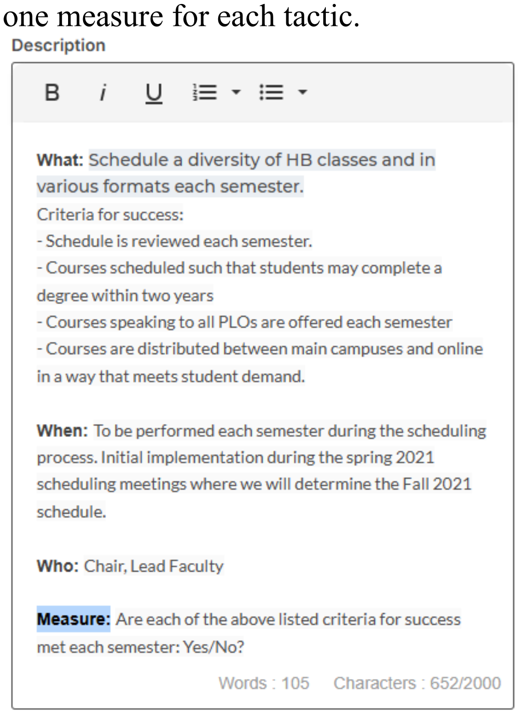


DIRECTIONS TO ADD/EDIT A TACTIC (previously called actions)

1. To create a tactic, toggle the down arrow next to a strategy and click on Add Tactic. Please note that in the create mode, you will want to **enter your tactics in reverse numeric order.** This is an unfortunate requirement in the Watermark software. Example: enter 1.1.3 tactic, then 1.1.2 tactic, then 1.1.1 tactic.
2. To edit an existing tactic, click on the title of the tactic.



3. Tactic details: List the activities or tasks needed to implement the associated strategy. Tactic items should be specific enough to tell HOW the activity will be carried out with accountability.
   Titles - Note 70 character maximum for the title. We suggest three or four summary words.
4. Description: Note 2000 character maximum for the description.
   Use the following template format.
   a. What – List in detail (bullets preferred) the various items (steps) needed to complete the activity. These will be used to determine the percentage of progress towards completion.
   b. When – List the projected timeframe within the current fiscal year when the activity will start and be completed.
   c. Who - Titles only of the person(s) that are responsible for organizing and completing the tactic.
   d. Measure - These explain WHAT mechanism(s) will be used to collect data and track progress in completing the tactic. This is typically quantitative but can be a qualitative result. Measures are things (tracking tables, surveys, rubrics, etc.) Example: actual effect/projected effect = Effectiveness percentage. You must have at least one measure for each tactic.



5. Enter any budget increase needed to accomplish the action items. This must be a whole number so round up. Describe in detail what the funds would cover and a justification for the purchase. Indicate whether this is a one-time ask or a recurring expense.

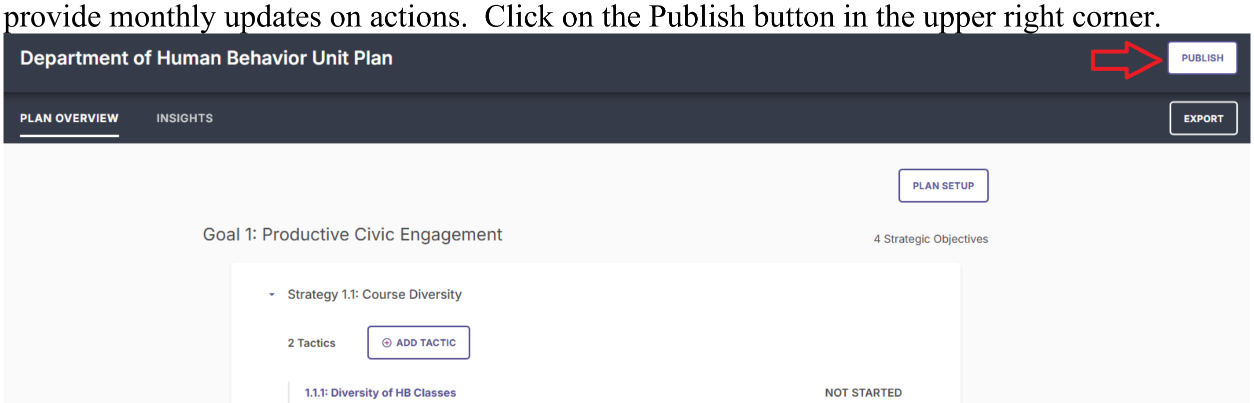
6. When you have completed your action item, click on ***Save Tactic***. All actions should display under the associated strategy.

EXPORT ENTIRE UNIT PLAN

To view the plan offline, save a copy, or distribute it to others, click on Export and select the Tactics Status and Progress option. The unit plan will be exported only as a csv Excel file. Open the exported unit plan from your computer download application and save it to your computer.

PUBLISH AND ASSIGN UNIT PERSONNEL TO ACTIONS

Once your unit plan is completed, you can assign yourself or subordinate unit personnel to provide monthly updates on actions. Click on the Publish button in the upper right corner.



Automatically all divisions, schools, departments, or programs under your supervision will appear. Your name should appear as the Lead under your organization. Any associated lead personnel in subordinate units will also show up next to the unit.

1. ***Assign a lead*** to be responsible for completing the action by clicking on the box next to the unit.
2. If there are no associate lead personnel or a change in personnel needs to be made, please contact the Director of IEASP to have them added to the system. Once they are added to the relevant unit, you will be notified by CSN email.
3. When you are done assigning leads, ***click on apply***.
4. Note we will map outcomes later once we create a new CSN strategic plan.

MONTHLY CHECKIN AND STATUS

1. Open your unit plan at least monthly to update the status (Not started, in progress, completed) and percentage of completeness (your estimation) if the action has been assigned to you, or view the updates provided by the assigned lead personnel.
2. There is an option to upload files in support of the action steps completed or data for measures.

CREATING AND MAPPING UNIT PLAN OUTCOMES

Outcome Types

You can have several outcomes, and each should be relevant to the unit mission statement. PSS uses both Learning and Success Outcomes. Learning Outcomes are designed to articulate the knowledge, skills, and dispositions attained by students through learning and/or co-curricular experiences. Success Outcomes enable administrative units to capture and monitor continuous improvement efforts for internal reporting and accreditation needs. Academic units can also use Success Outcomes to assess non-instructional program efforts (such as enrollment, completions, and retention). Unit plans must have Success Outcomes but may have Learning outcomes if the unit provides services or events that introduce, reinforce, or practice knowledge, skills, and dispositions.

CREATE SUCCESS OUTCOMES

Success outcomes are 2-3 outcomes with benchmark(s) for success. Success outcomes indicate the outcome effect that you anticipate or would like to see that would indicate the effectiveness of your unit on an annual basis and year end check in. Effectiveness is caused as the result of implementing items in your unit plan on your target population of communities of interest. There are three categories of outcomes (Effectiveness, Adequacy, Efficiency) we would like you to consider and each will be explained and example provided below:

Effectiveness: The effect or change your unit has had on behavior or actions.

- Example 1: Increase student headcount from X to Y in the XXX event by a specific date.
- Example 2: Increase employee participation in professional development sessions from X to Y by a specific date.

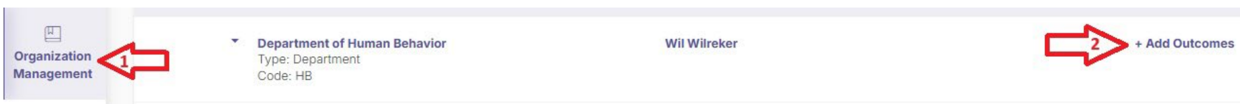
Adequacy: The extent to which your unit has made on your target population needs.

- Example 1: Increase student satisfaction with XX services from X to Y by a specific date.
- Example 2: Using Strategy 3.1, decrease student need for food pantry pick-ups from X to Y by a specific date.

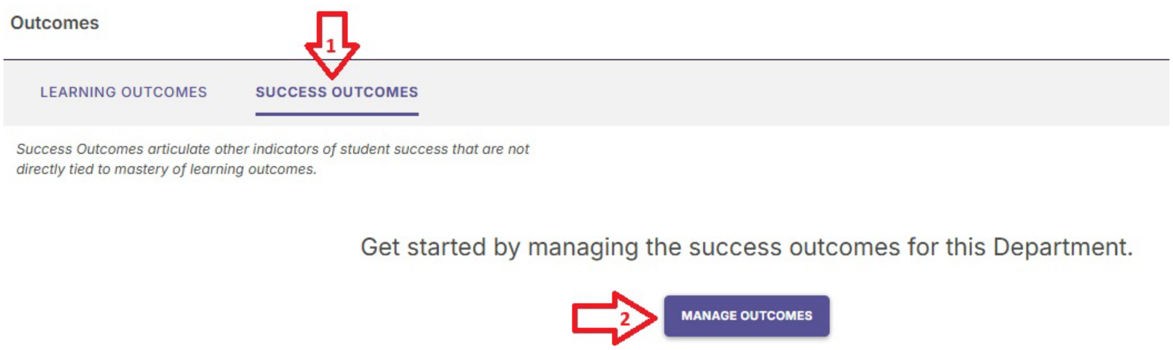
Efficiency: The level of sufficiency in utilizing unit time, resources, or personnel.

- Example 1: Decrease the amount of time spent on XXX tasks from X to Y by a specific date.
- Example 2: Increase the amount of new employee hires from X to Y by a specific date.
- Example 3: Using Strategy 3.3, increase the amount of student scholarship awards from X to Y by a specific date.

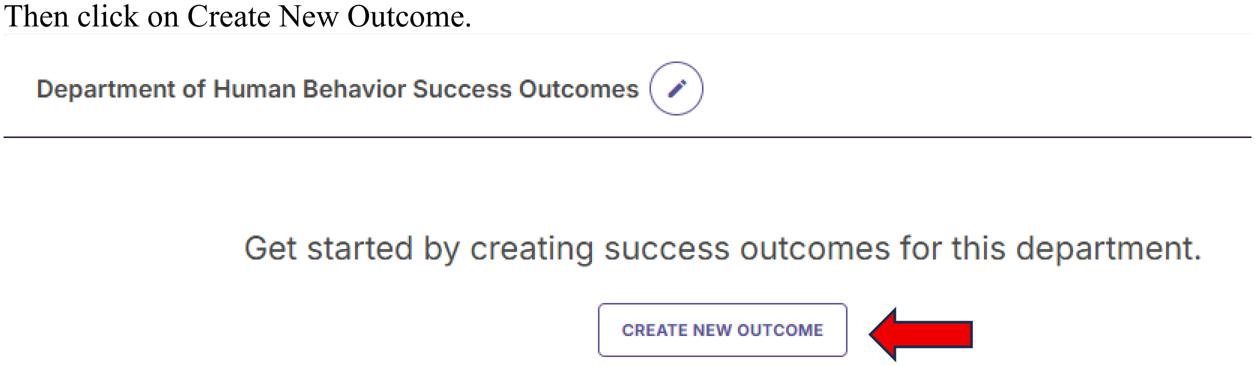
To add outcomes within Watermark PSS, first click on Organization Management in the left-hand navigation column and then click on Add Outcomes to the right of the workspace manager for the unit.

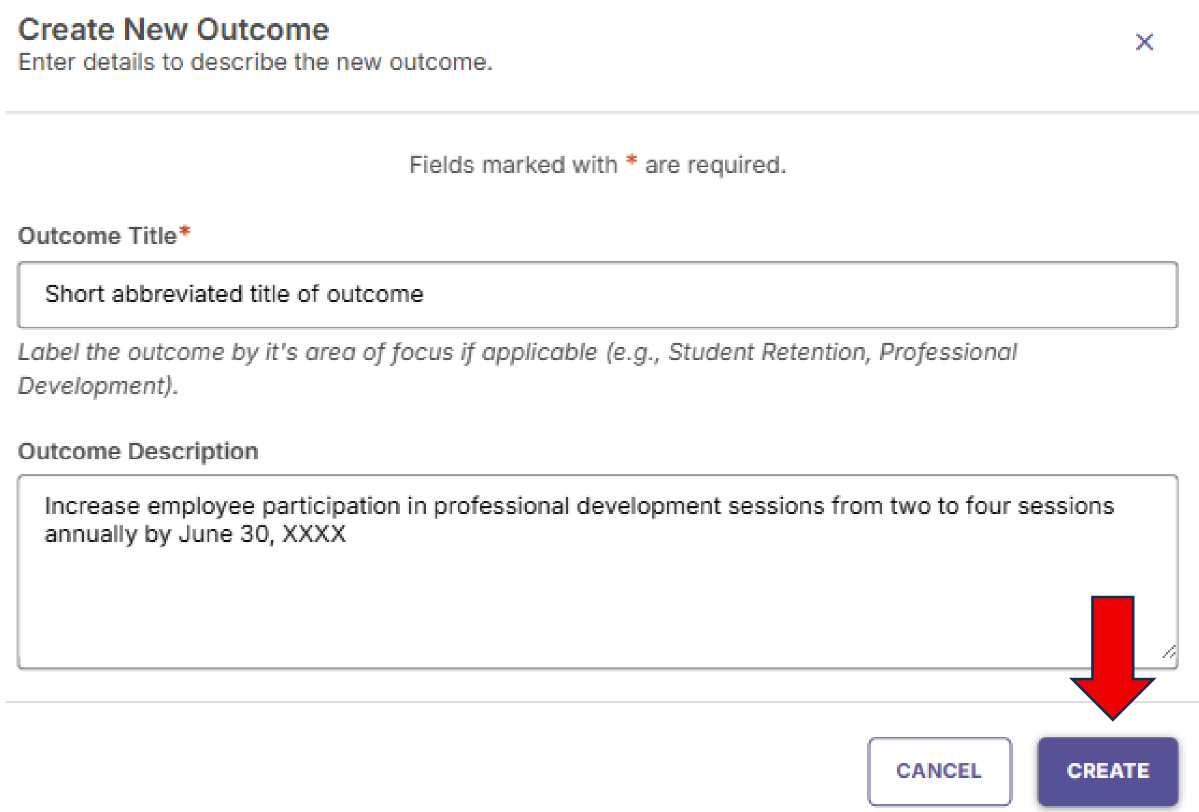


When you click on Add Outcomes it defaults to display the Learning Outcomes space. Click on Success Outcomes first and then click on Manage Outcomes.

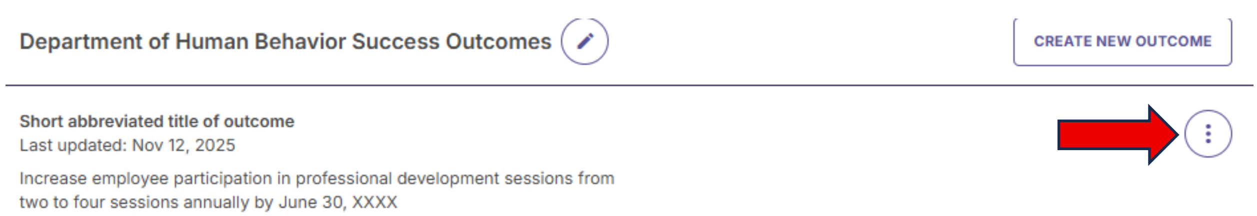


Then click on Create New Outcome.





After the outcome is created, you can edit if needed by clicking on the button and select EDIT. You can add additional outcomes by clicking on Create New Outcome. Repeat this process until you have created 2-3 success outcomes.

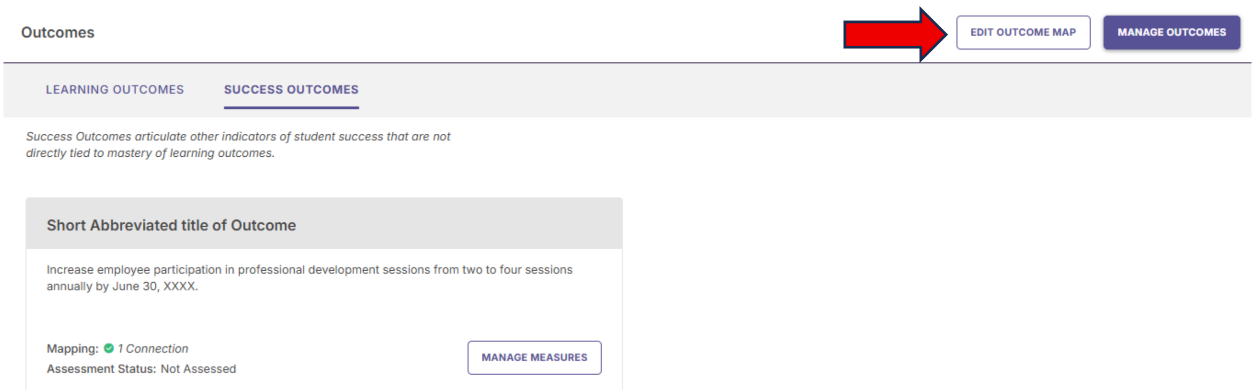


OUTCOME MAPPING

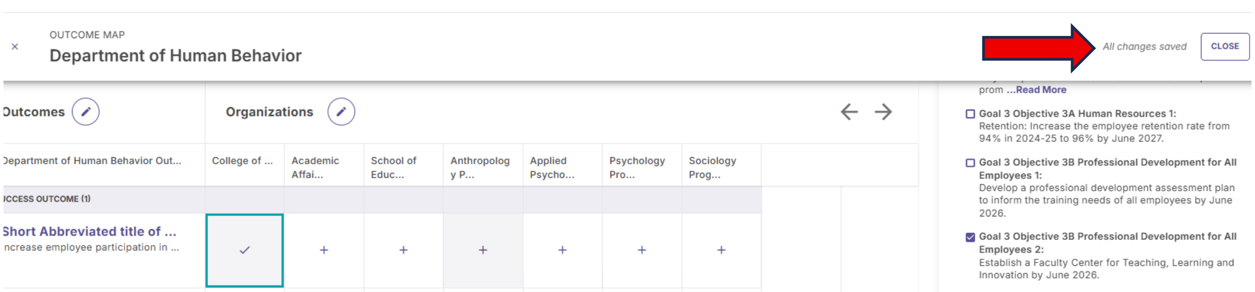
An Outcome Map is a way to link UNIT outcomes to organizational outcomes within your institutional hierarchy to (visually) demonstrate alignment across different levels. A UNIT can align its outcomes to those of its parent Department, and the Department can illustrate how its own outcomes align with the College and/or University.

ALIGNING OUTCOMES TO THE STRATEGIC BRIDGE PLAN (SBP) FOR UNIT ADMINISTRATORS

After you have created your outcomes return to the success outcomes display to view all your success outcomes. Click on EDIT OUTCOME MAP to map each outcome to a SBP indicator.

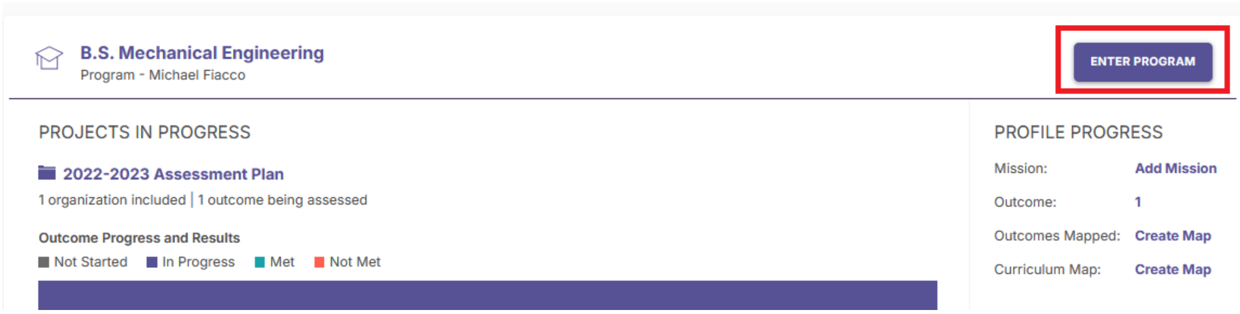


Your success outcomes will display on the left, and the default 1st column will say College of Southern Nevada (CSN). You may see additional columns associated with the plans of your chain of command. They may ask you to map your outcomes to their plans in addition to the CSN SBP. Click on the first cell associated with your outcome and CSN. This will display all indicators that can be used for alignment. The CSN Institutional Learning Outcomes (ILOs) will always be displayed first. Only map to the ILOs if your outcome allows students to demonstrate their skill in that ILO. Most units will need to scroll past the ILOs to view the Strategic Bridge Plan Goals and Indicators. Place a check mark next to the box associated with the relevant indicator(s) then click on Done. Alignment is indicated by a check mark in the cell next to the outcome within the CSN column. You can repeat the same process for any other higher-level plan within your reporting structure.



ALIGNING OUTCOMES TO THE STRATEGIC BRIDGE PLAN (SBP) FOR LEAD FACULTY

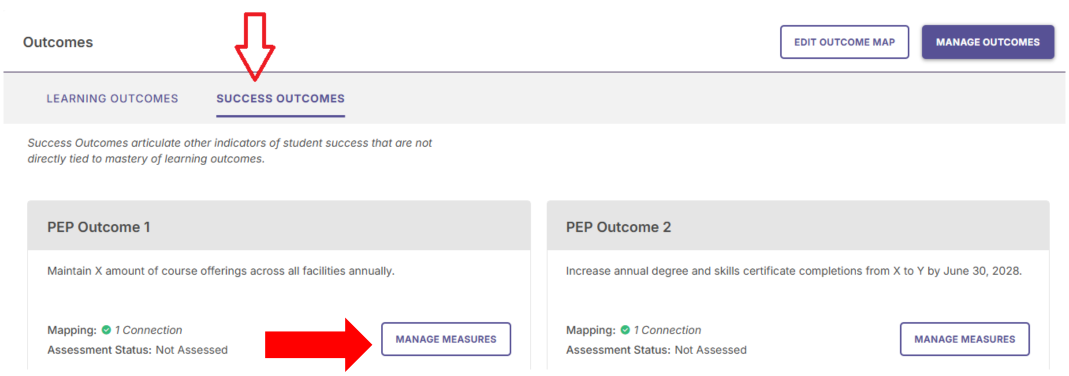
Upon logging into Planning & Self Study, a Lead would land on their homepage, which contains dashboards for each organization, such as a program, that they have been assigned to as Lead. There will be a single dashboard for each organization the user is assigned to. Each dashboard will contain links to assessment plans, program reviews, and other initiatives the organization is included in. To begin mapping Outcomes, select "Enter Program" to the right of the dashboard. (Note: This may also say "Enter Department" or other terms depending on the actual level of the organization).



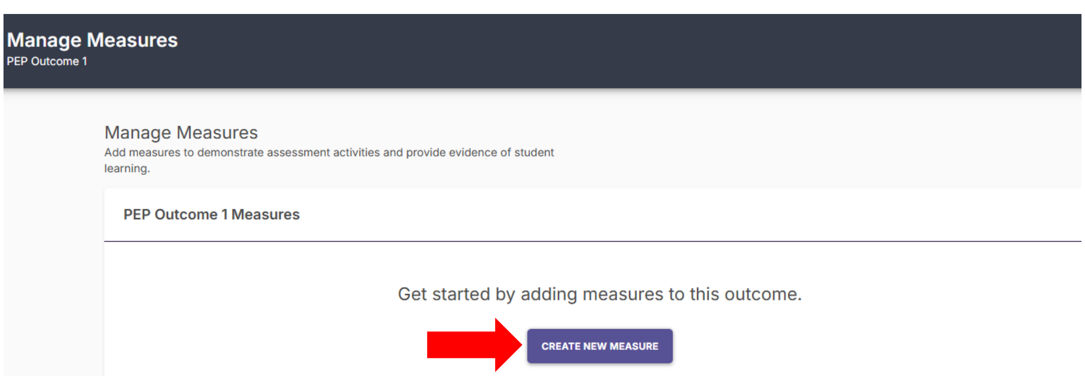
SET UP MEASURES FOR OUTCOMES

Onder the Organization Management tab in PSS, you can view your outcomes by clicking on the outcomes link.

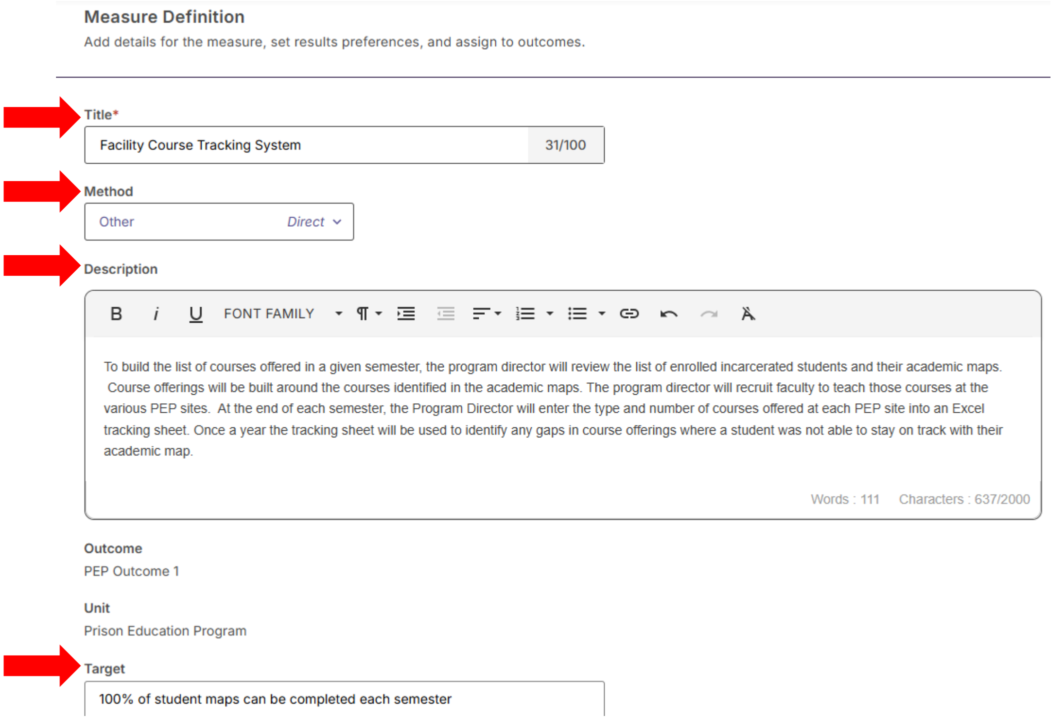
For Unit Plan Outcomes, make sure to switch from the default Learning Outcomes to Success Outcomes by click on the Success Outcomes title. The view will now display each of the outcomes you previously created. For each outcome you will need to identify a measure that is the data collection tool or system you use to acquire the relevant data needed for the success outcome. Click on Manage Measures for one of your outcomes.



Then Click on Create New Measures

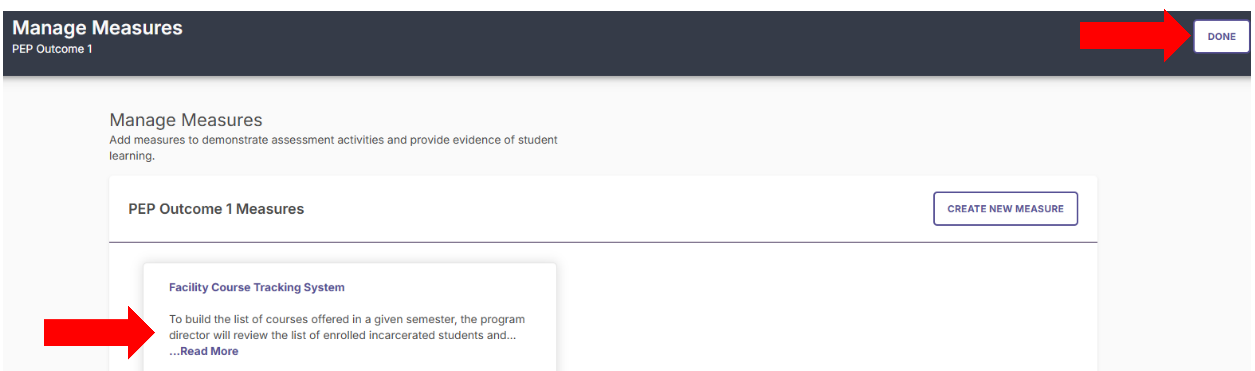


Enter a title of the data collection tool or system, then select the type of method that classifies the data collection tool as a direct or indirect measure.



Type a description of the data collection tool, what data it will provide, who will be responsible for collecting the data, and when. Last identify a success target that will indicate successful achievement of the outcome. When all items are completed, click on the Create Measure button at the upper right hand side of the window.

The Measure should be visible and then click the Done button. You can repeat this process for each of your subsequent Success Outcomes.



For help with this guide or if you have unit planning questions, please reach out to the Office of Institutional Effectiveness, Accreditation, and Strategic Planning (702) 651-7784 or Sharon.peterson@csn.edu and Jyoti.senthil@csn.edu

ASSESSMENT PLANNING TEMPLATE FOR ENTRY IN WATERMARK

If you did not have a unit plan in Watermark Taskstream or want to work on a completely new unit plan, please complete this template and submit to Sharon.peterson@csn.edu and Jyoti.senthil@csn.edu so it can be entered into Watermark PSS.

Strategy 1.1 Title (no more than 70 characters)
Strategy 1.1: Description

	Tactic 1.1.1 Title:
	What:
	When:
	Who:
	Measure(s):
	Budget Request Amount:
	Budget Request Justification:

Unit Mission Statement:

Goal I Title: (no more than 70 characters)
Goal I Description:

	Tactic 1.1.2 Title:
	What:
	When:
	Who:
	Measure(s)
	Budget Request Amount:
	Budget Request Justification:

Strategy 1.2 Title (no more than 70 characters) :
Strategy 1.2: Description:

	Tactic 1.2.1 Title:
	What:
	When:
	Who:
	Measure(s) :
	Budget Request Amount:
	Budget Request Justification:

	Tactic 1.2.2 Title:
	What:
	When:
	Who:
	Measure(s)
	Budget Request Amount:
	Budget Request Justification:

Goal II Title: (no more than 70 characters)
Goal II Description:

Strategy 2.1 Title (no more than 70 characters) :
Strategy 2.1: Description :

	Tactic 2.1.1
	What:
	When:
	Who:
	Measure(s):
	Budget Request Amount:
	Budget Request Justification:

	Tactic 2.1.2 Title:
	What:
	When:
	Who:
	Measure(s)
	Budget Request Amount:
	Budget Request Justification:

Strategy 2.2 Title (no more than 70 characters)
Strategy 2.2: Description

	Tactic 2.2.1 Title:
	What:
	When:
	Who:
	Measure(s)
	Budget Request Amount:
	Budget Request Justification:

	Tactic 2.2.2 Title:
	What:

	When:
	Who:
	Measure(s)
	Budget Request Amount:
	Budget Request Justification:

Goal III Title: (no more than 70 characters)
Goal III Description:

Strategy 3.1 Title (no more than 70 characters)
Strategy 3.1: Description

	Tactic 3.1.1 Title:
	What:
	When:
	Who:
	Measure(s)
	Budget Request Amount:
	Budget Request Justification:

	Tactic 3.1.2 Title:
	What:
	When:
	Who:
	Measure(s)
	Budget Request Amount:
	Budget Request Justification:

Strategy 3.2 Title (no more than 70 characters)
Strategy 3.2: Description

	Tactic 3.2.1 Title:
	What:
	When:
	Who:
	Measure(s)
	Budget Request Amount:
	Budget Request Justification:

	Tactic 3.2.2 Title:
	What:
	When:
	Who:

	Measure(s)
	Budget Request Amount:
	Budget Request Justification:

Please copy the unit plan table as needed to add additional Goals, Strategies and Tactics.

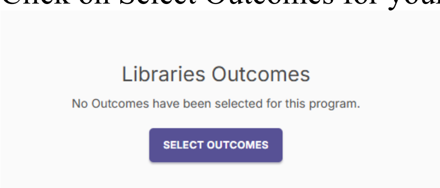
UNIT PLAN PROGRESS REPORTING

When you log into Watermark PSS, look under Projects to find the current Unit Plan Progress Reporting Cycle. Click the title to enter the reporting workspace.

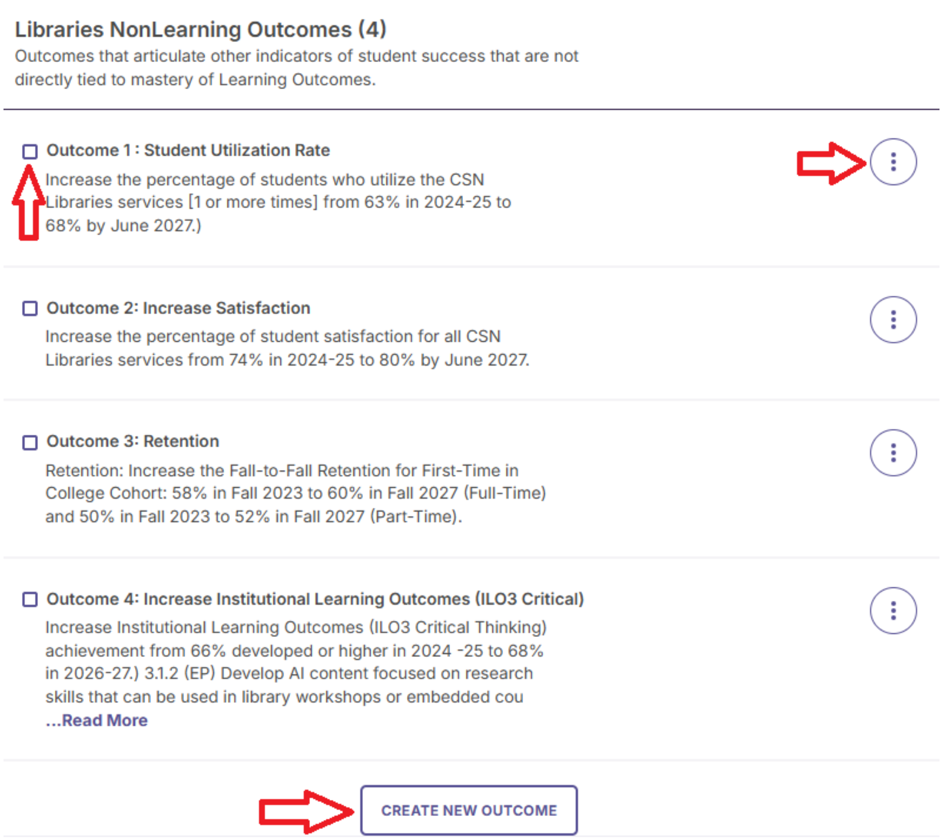
Locate the title of your unit and click the unit title.

SELECTING OUTCOMS AND MEASURES TO INCLUDE IN THE PROGRESS REPORT

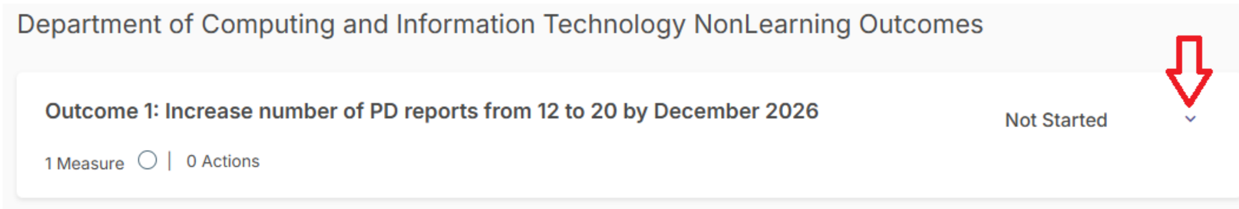
Click on Select Outcomes for your unit



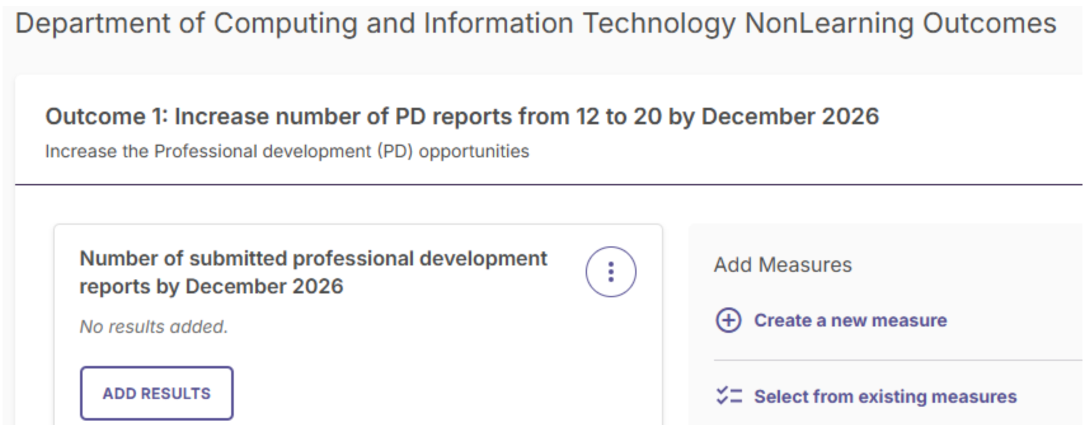
You can report progress on any or all of your established success outcomes. Click on the box next to the title of an outcome to include the outcome in the current report. You can also edit the outcome (small changes) or revise the outcome completely by clicking on the button to the left of the outcome. You can also add a new outcome by clicking on the Create New Outcome button.



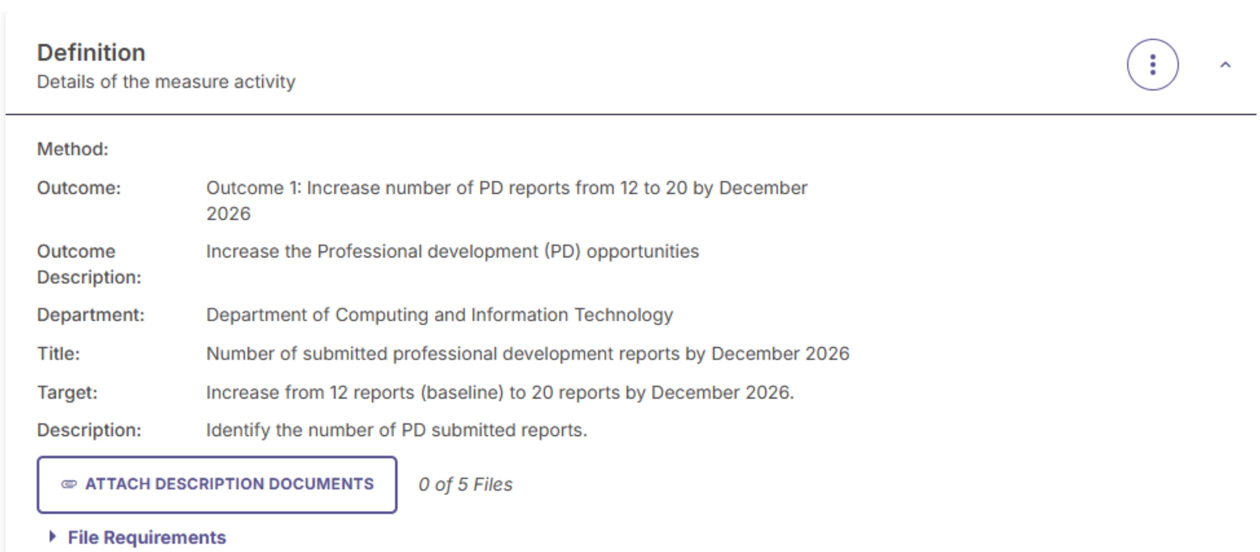
When you are done adding, editing, or creating outcomes, click on the purple apply selection button in the upper right of the workspace. Each outcome you have included in the report should be displayed. To view the measure (s) you created for the outcome, click on the expand arrow next to the words Not Started.



The outcome will be listed with all existing measures. You can also add a new measure if needed by click on Create a New Measure or Select from Existing Measures.

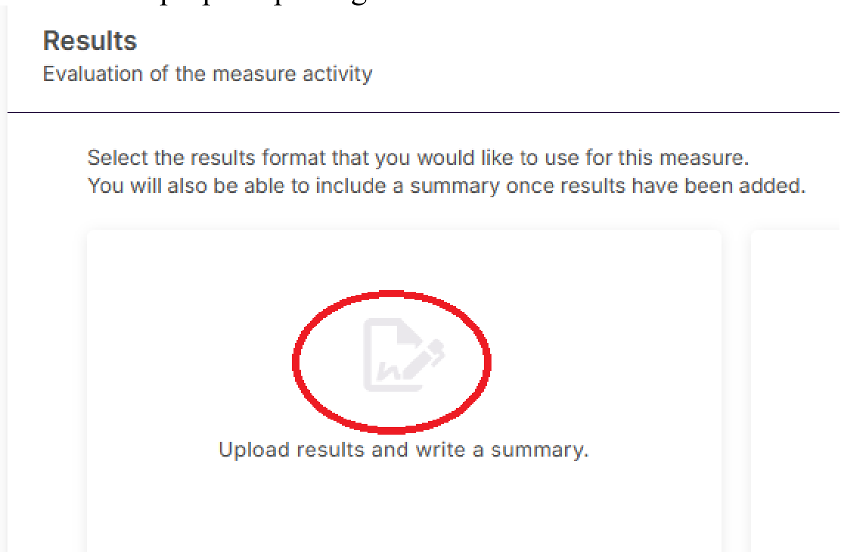


To begin the progress reporting process for each outcome, click on the Add Results button. The details of the outcome and measure will be displayed including the target for achievement. You have the option to upload an example of the measure such as survey or focus group questions. Watermark will accept many different file types. You can view those types by expanding the arrow next to File Requirements.

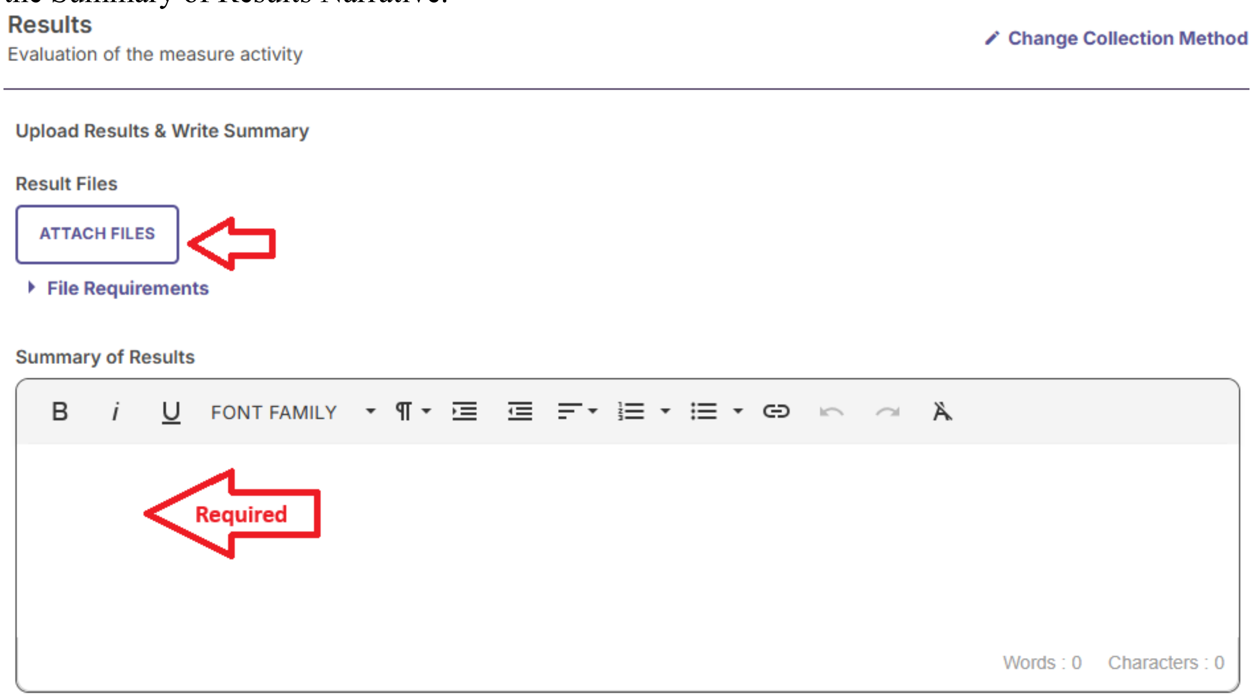


REPORTING RESULTS

Scroll down to the Results section and hover your cursor over the wording Upload results and Write a Summary. A purple icon will appear in the area indicated below with the red circle. Click on the purple reporting icon.

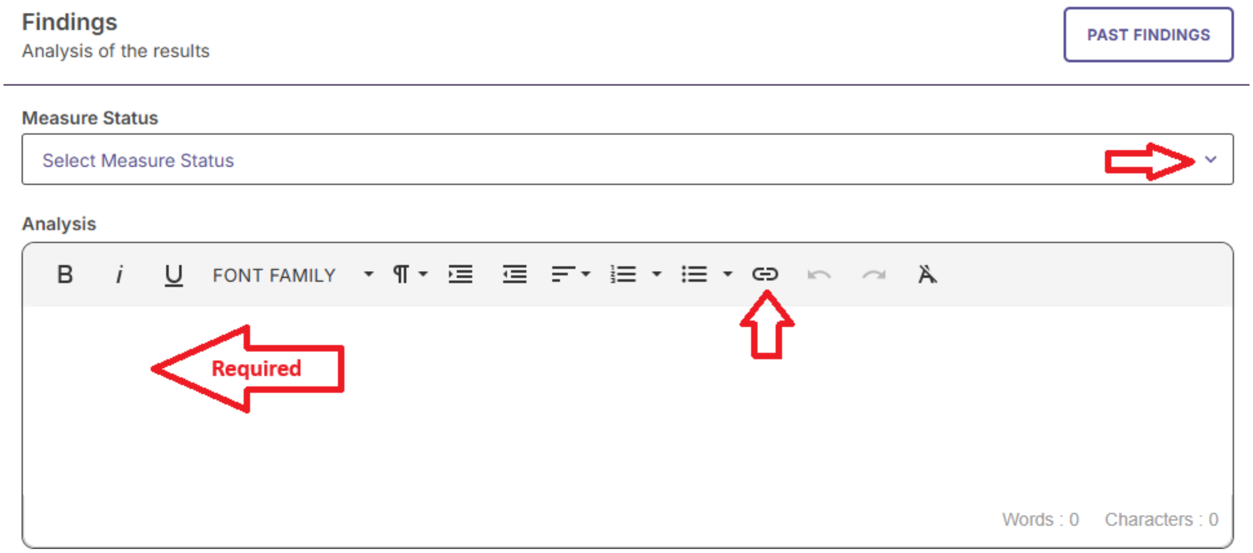


In the Summary of Results area, write a narrative specifically addressing how the data shows progress on achievement of the target listed in the Details of the Measure Activity displayed above the reporting area. You may also upload any data collection documents as supporting evidence by click on the Attach Files button. Please do not only attach a file without completing the Summary of Results Narrative.



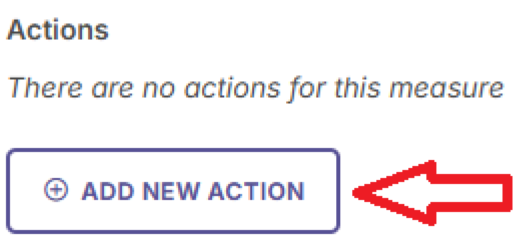
FINDINGS AND MEASURE STATUS

Scroll below the results to the findings area. Click on the expand icon to select the current Measure Status as Met or Not Met for the reporting cycle. Next provide an analysis of the measure findings (e.g. summary of strengths and weaknesses, data trend comparison from previous years, progress on measure deployment). You can also upload a link to a data dashboard or other website data instrument. Follow the prompts to add the link.



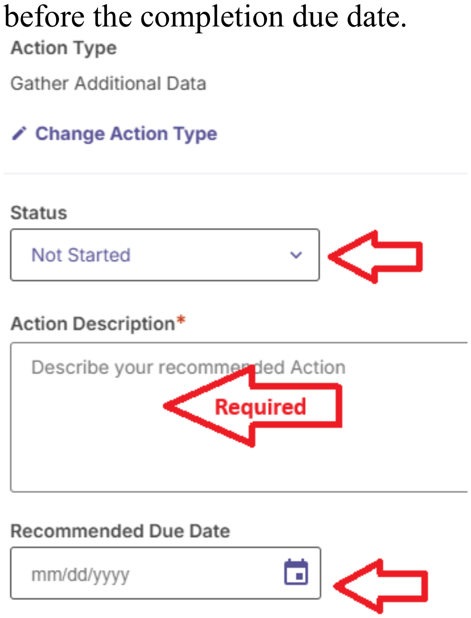
DETERMINE AN ACTION FOR IMPROVEMENT

Scroll down to the Actions area and click on the Add New Action button.

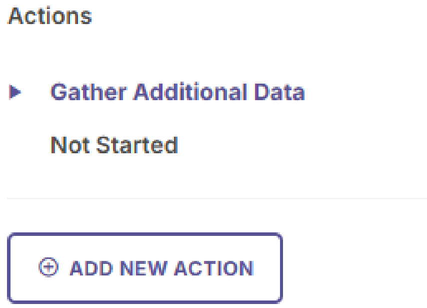


Various prepopulated actions will appear in a pop-up window to the right of the workspace. You only need to add one action for improvement. If you feel that the progress does not need any action for improvement you can select Maintain Assessment Strategy. If there isn't a prepopulated action that is relevant to your unit, you can select the Other option.

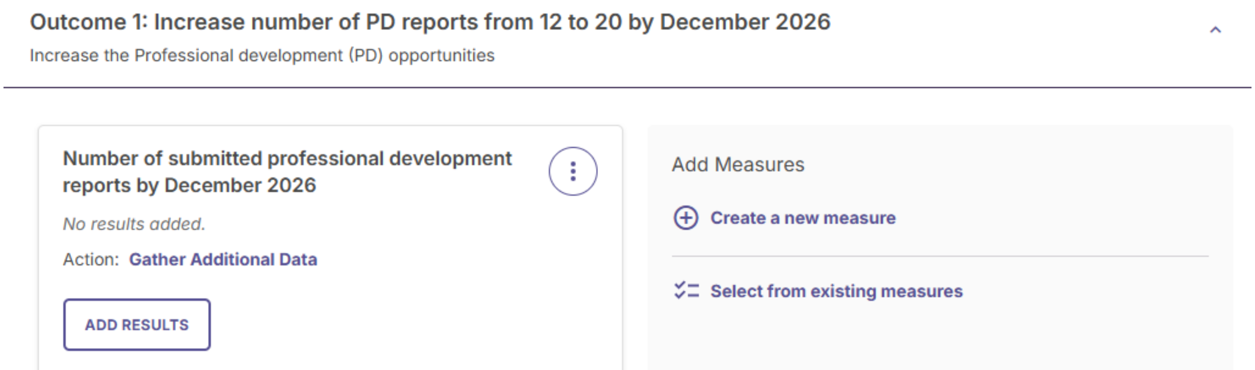
For example, I have clicked on the action Gather Additional Data. The action automatically defaults to Not Started status. In the Action Description area, thoroughly describe what tasks need to be completed to accomplish the action for improvement. Last, set a date for final completion of the action. Watermark will send you reminder prompts to work on your action before the completion due date.



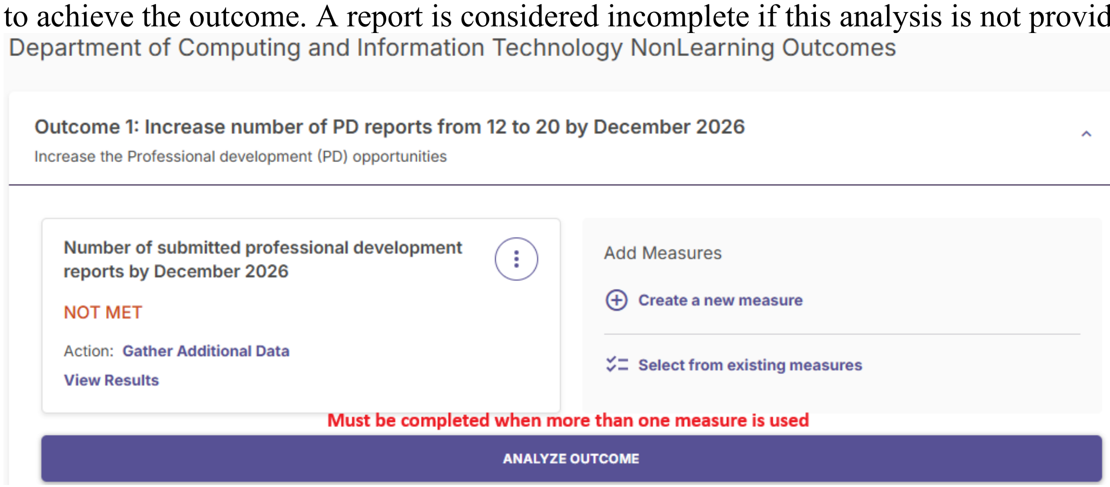
When you are done, click on the Create Action button on the lower right. The action you selected will appear in the report area. You can add additional actions if needed.



When you have completed all elements of reporting for the outcome (i.e., Results, Findings, Actions), then click on the purple Save & Close button on the upper right of the workspace. A summary of information will be displayed in a box below the outcome. If there is any missing information, you will be prompted to add the information with a button displaying the item.



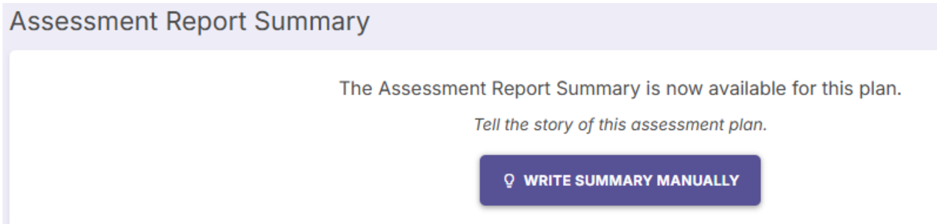
When all items required for reporting outcome progress are added, a summary of information will be displayed in the box below the outcome. NOTE: If you are using more than one measure for the outcome, you must click on the purple Analyze Outcome bar to comment on whether all measures must be met to achieve the outcome or whether only some of the measures must be met to achieve the outcome. A report is considered incomplete if this analysis is not provided.



Complete reporting for each additional outcome included in the reporting cycle.

ASSESSMENT REPORT SUMMARY

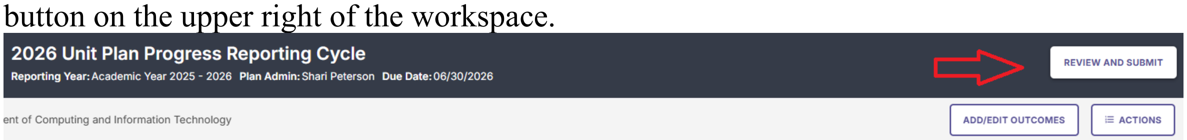
When a progress report has been completed for all outcomes included for the reporting cycle, you will be prompted to provide an Assessment Report Summary. This will appear above the outcomes section of the report. Click on the Write Summary Manually button.



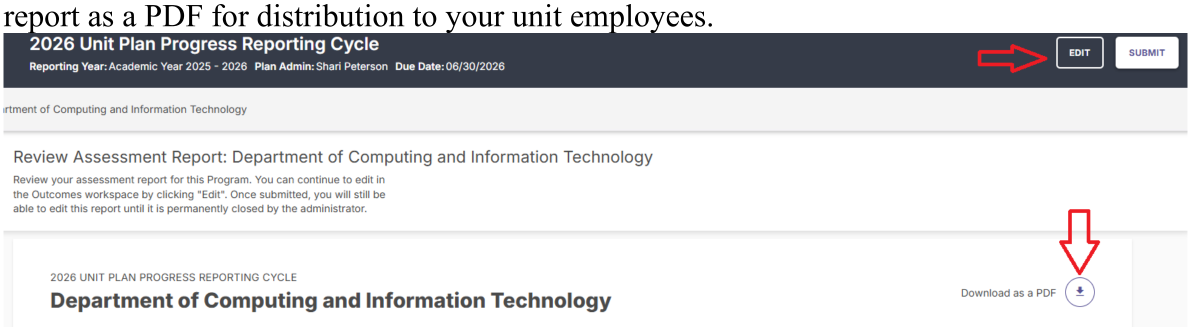
Provide a summary of achievement across all your outcomes and a self-reflective summary of your unit's overall effectiveness during the unit planning cycle. Click on the purple save button when you are done.

REVIEW AND SUBMIT THE UNIT PLAN PROGRESS REPORT

After you have completed the Assessment Report Summary, click on the Review and Submit button on the upper right of the workspace.

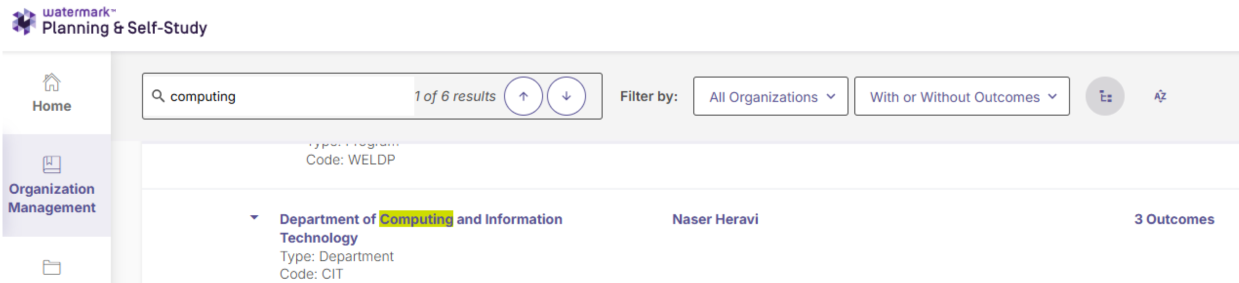


You will have the capacity to continue editing the report or submit the report. Before clicking on the white Submit button on the upper right of the workspace, you can download a copy of the report as a PDF for distribution to your unit employees.

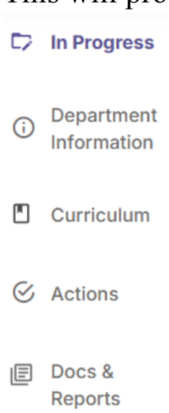


VIEW UNIT INFORMATION AND SUBMITTED PROGRESS REPORTS

From the Watermark login homepage, click on Organization Management. This will display the title of your unit and access to unit information. Click on the title of your unit.



This will provide tabs of information for your unit.



The In Progress tab displays any progress reporting project that your unit has been assigned to and a summary of progress.

The Information tab displays the unit mission and outcomes. This is also the area to map your outcomes to other higher level unit plans as well as the Strategic Bridge Plan.

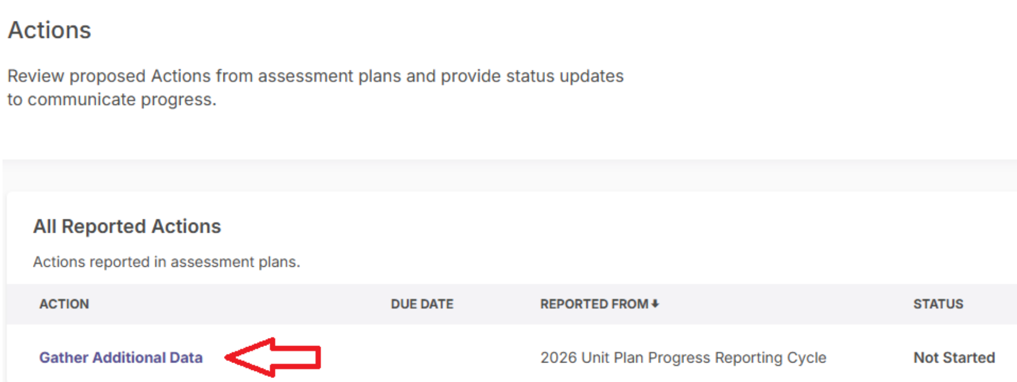
The curriculum tab displays any academic courses assigned to your unit (Deans and Department Chairs only).

The Actions tab will display any actions for improvement that you identified in unit plan progress reporting.

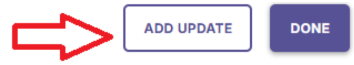
The Docs & Report tab will display any archived unit plans that were constructed in Watermark Taskstream or any documents related to the unit that you want to upload.

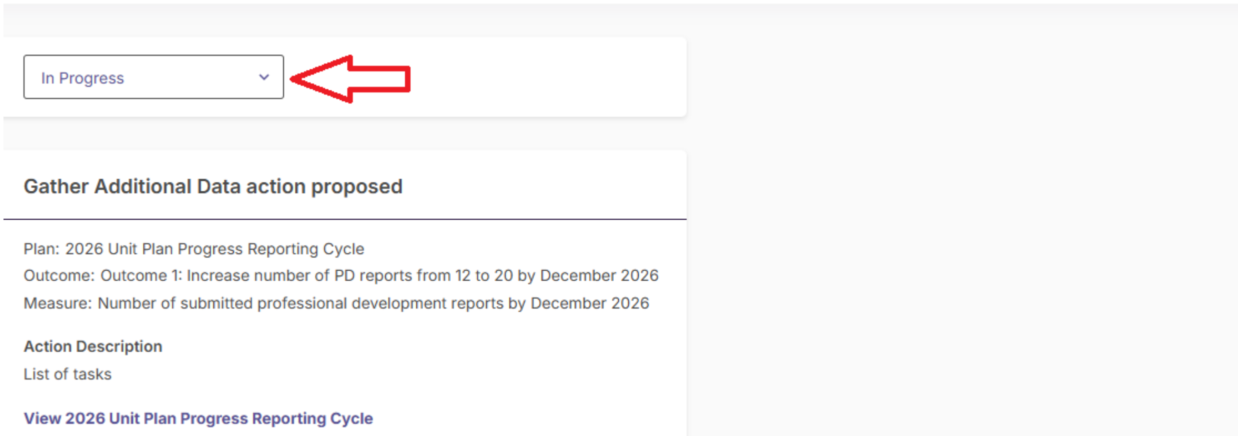
MONTHLY UPDATE OF ACTION STATUS

At least once a month, enter Watermark PSS to update the status of your report actions for improvement. Click on the Action title to Select a status for the action.



A status dropdown menu, details of the action, and link to the unit plan progress reporting cycle will be displayed. Click on the status dropdown menu and select one of the options: Not Started, In Progress, or Completed. Then click on the Add Update button.





In the action update window, report what has been completed and what is still in progress. For progress use only the following increments (25%, 50%, 75%,). This will help to standardize aggregate reporting across all CSN units. Click on the check mark to save your update. Once the update is added, click on the purple Done button on the upper right side of the workspace. Each time you check back in, you will click on the Add Update which will post below your previously submitted update.