



GUIDE FOR INSTITUTIONAL EFFECTIVENESS PLANNING & REPORTING IN CAMPUS LABS PLANNING

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Institutional Effectiveness Planning & Reporting in Campus Labs Planning

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Abbreviations Used in this document:

IE: Institutional Effectiveness

CLP: Campus Labs Planning

CL: Campus Labs

Goal: Unit/College Goal

Questions? Contact:

assessment@aa.ufl.edu

Part 1: Overview

Each administrative unit at UF, including the 16 colleges, the Libraries, the Graduate School, the Florida Museum of Natural History, and the Vice-Presidential and Senior Vice-Presidential units collect data, monitor internal processes, and analyze the results of activities on an annual basis. All Institutional Effectiveness (IE) Reports are housed in Campus Labs Planning, the university's planning and reporting software program. If you encounter any issues with CLP, you can contact assessment@aa.ufl.edu for assistance.

Each administrative unit and college has established its own dates for submission of annual data reports with the Office of Institutional Assessment. [View the due dates for each administrative unit.](#)

Annual planning and reporting cycle: This is a suggested workflow, which should be modified to meet your unit's specific needs.

August – November (Depending on your unit's deadline): Institutional Effectiveness Data Reports submitted

Dec. - Feb.: Reports reviewed by the UF Office of Institutional Assessment

March: Reviews returned to units.

March – May: Units address any concerns that came up during review, editing reports as needed in CLP in the same year for which data was reported.

May – June: All Plan information (i.e. everything except results for Unit/College Goals) is automatically rolled over to the next year once units have had time to address reviewer concerns. Units should not begin working in the next reporting year within CLP until the rollover is complete. Any changes made to fields in the next reporting year will be overwritten during the rollover. Units are notified by email once the rollover is complete. Units are notified annually of the rollover date.

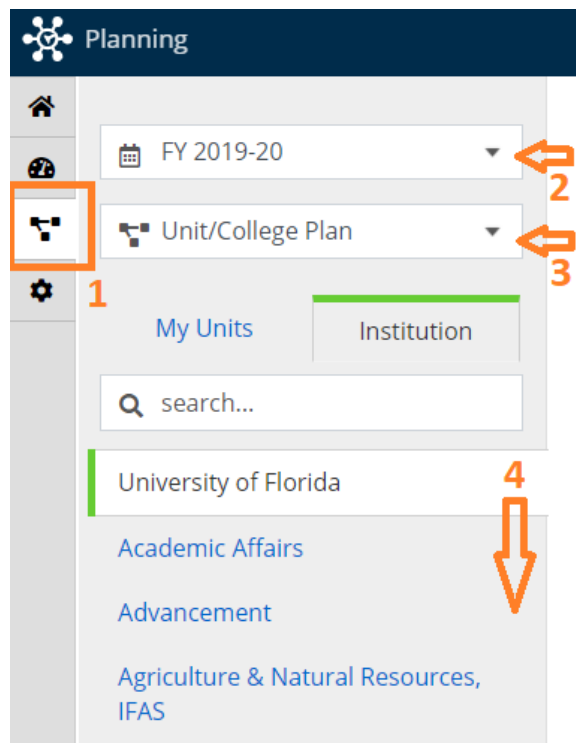
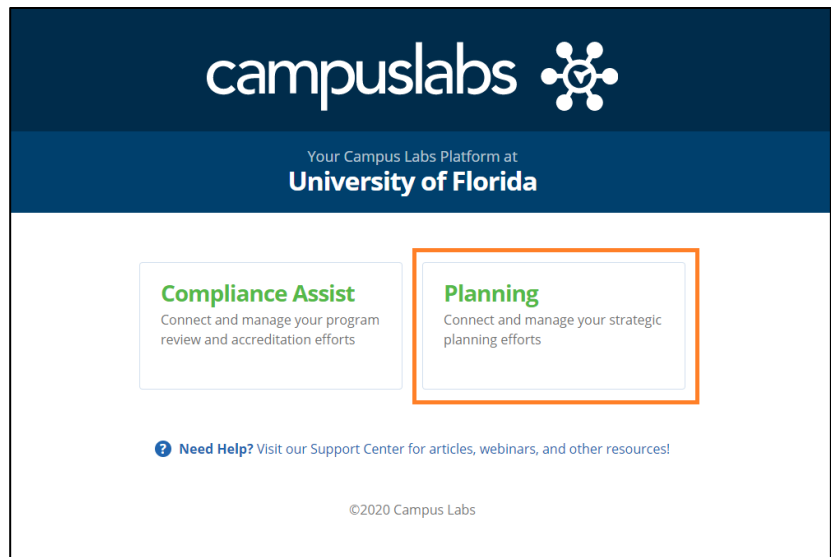
July – Unit Deadline: Following the rollover, units should make any updates to their IE plan in the new reporting year and enter Results and Evaluation data for Unit/College Goals. IE Plan updates might include changes to a Unit/College mission, responsible users, changes to a Unit/College Goal, or updates to the IE Detail. If a goal changes, it may also be necessary to modify the connections to Long-Range Presidential Goals. Results and evaluation data should be entered for each goal. For detailed information, see [Part 2: Preparing an Institutional Effectiveness Report](#). You may also skip ahead for [detailed information on connecting goals to Long-Range Presidential Goals](#). If you are requesting plan updates and data from colleagues, it may be helpful to run a report for use as a template to share with your colleagues. For detailed information see [Part 3: Running a Report](#).

Part 2: Preparing an Institutional Effectiveness Report

Following the annual CLP rollover, you can login to CLP and begin making updates to the current reporting year and entering results and evaluation data for all Unit/College goals. When entering an IE report make sure to check all plan items:

1. Unit/College Mission
2. Unit/College Goals
3. Institutional Effectiveness Detail

Log into CLP
(<https://ufl.campuslabs.com>)
and enter your GatorLink
username and password,
then click “Planning”.



1. Select the org chart symbol at the far left.
2. Select the year being edited.
3. Select “Unit/College Plan”.
4. Navigate to the appropriate unit.

Once you have navigated to your unit, click the unit name and a list of plan items will appear to the right. If you do not see plan items, check to make sure you are on the “Plan Items” tab (orange star).

The screenshot shows the Planning system interface. On the left sidebar, the 'Advancement' unit is selected under 'University of Florida'. The main content area displays a list of plan items for the 'Advancement' unit. The 'Plan Items' tab is highlighted with an orange star. The list includes:

- Advancement**
Advancement Unit/College Mission 7/1/19 - 6/30/20
- Talent Management**
Advancement Goal 1:Unit/College Goal 1 7/1/19 - 6/30/20
- Strategic Communications & Marketing**
Advancement Goal 2:Unit/College Goal 2 7/1/19 - 6/30/20
- Alumni Relations**
Advancement Goal 3:Unit/College Goal 3 7/1/19 - 6/30/20
- Development**
Advancement Goal 4:Unit/College Goal 4 7/1/19 - 6/30/20
- Operations**
Advancement Goal 5:Unit/College Goal 5 7/1/19 - 6/30/20
- Advancement IE Detail**
Advancement Institutional Effectiveness Detail 7/1/19 - 6/30/20

Now you are ready to update the Unit/College plan items. To open a plan item, click the blue plan item title. Open the Unit/College Mission.

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- Advancement**
Advancement Unit/College Mission 7/1/19 - 6/30/20
- Talent Management**
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- Operations**
Advancement Goal 5:Unit/College Goal 5 7/1/19 - 6/30/20
- Advancement IE Detail**
Advancement Institutional Effectiveness Detail 7/1/19 - 6/30/20

Edits can be made to any of the fields in a plan item. Make sure to check, and if necessary update the responsible users. Once you have finished, click “Done” in the blue box on the lower right to save your changes and to go back to the list of plan items.

We are now going to go through and make updates to all Unit/College Goals and report Results and Evaluation data for each goal. Select the first goal.

Planning

FY 2019-20 / UNIT/COLLEGE PLAN

Edit Plan Item

Template: Unit/College Goal

Number *
Goal numbers should be listed as Goal 1, Goal 2, etc.

Goal 1

Title *
Talent Management

Goal
What are the unit/college goals which may include service delivery goals for non-academic units?
Retain, acquire, and develop a community of employees and volunteer talent leveraging unique knowledge and skills to advance the campaign

Start *
07/01/2019

End *
06/30/2020

Permissions **Related (2)** **History**

Supports (Connected Up) [+ Supports](#)

A strengthened public engagement of the university's programs with local, national, and international communities.
University of Florida Long-Range Presidential Goal

A physical infrastructure and efficient administration and support structure that enable preeminence.
University of Florida Long-Range Presidential Goal

This Item

Supported By (Connected Down) [+ Supported By](#)

As you work through updating a goal and reporting Results and Evaluation data, you can find guidance above each field. Check each field, as there may have been updates from previous reporting years.

Connecting Unit/College Goals to Long-Range Presidential Goals.

In order to indicate how each Unit/College Goal relates to University Strategic Plan Long-Range Presidential Goals, as defined in [The Decade Ahead](#), you will connect each goal up to the University Strategic Plan Long-Range Presidential Goal(s) that the Unit/College goal aligns with. To connect a Unit/College goal up to a Presidential Goal, you must have the goal you are connecting open. Select the [↑↓Related](#) tab on the right hand side, then select the [+Supports](#) button alongside “Supports (Connected Up)”. Note that you will always be connecting up to the Long-Range Presidential Goals.

Planning

FY 2019-20 / UNIT/COLLEGE PLAN

Edit Plan Item

Template: Unit/College Goal

Number *
Goal numbers should be listed as Goal 1, Goal 2, etc.

Goal 1

Title *
Talent Management

Goal
What are the unit/college goals which may include service delivery goals for non-academic units?
Retain, acquire, and develop a community of employees and volunteer talent leveraging unique knowledge and skills to advance the campaign

Start *
07/01/2019

End *
06/30/2020

Permissions **Related (2)** **History**

Supports (Connected Up) [+ Supports](#)

A strengthened public engagement of the university's programs with local, national, and international communities.
University of Florida Long-Range Presidential Goal

A physical infrastructure and efficient administration and support structure that enable preeminence.
University of Florida Long-Range Presidential Goal

This Item

Supported By (Connected Down) [+ Supported By](#)

Once you select the **+Supports**, you will be taken to a new page to identify the goals you want to connect up to.

The screenshot displays the 'Select a Supports (Related UP) Item' interface. On the left, a sidebar lists various organizational units, with 'University of Florida' selected. The main area shows a table of Long-Range Presidential Goals. The first goal, 'The University of Florida offers and exceptional academic environment for all.', is highlighted. To its right, a blue '+' button is visible. On the far right, the 'Supports (Connected Up)' section lists the selected goal. At the bottom right, a 'Back to Plan Item' button is highlighted.

1. Make sure the correct FY is selected
2. Select "University Strategic Plan"
3. Select "University of Florida"
4. Select the Long-Range Presidential Goal you want to connect to by clicking the **+** button beside the goal. Once you have done this, the **+** will change to a **✓**, and you will see the Long-Range Presidential Goal you chose listed under "Supports (Connected Up)" on the right. If you select a goal by accident, or need to change a connection from a previous year, you can unselect the goal by clicking the **x** beside the goal on the right.
5. Once your selection is complete, click **< Back to Plan Item** to return to your Unit/College goal.

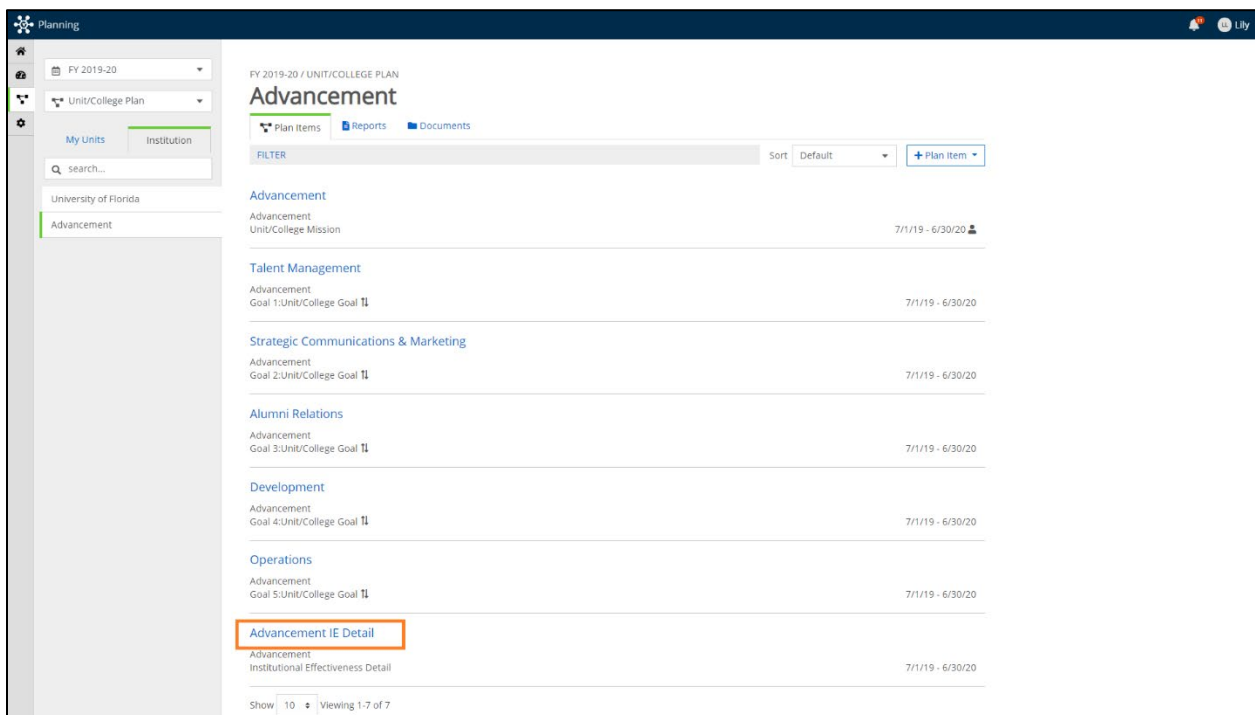
Continue updating your Unit/College goal, including the Action Items, Measures of Action Items, Time Period of Action Items, and Resources of Action Items.

If data is ready, enter the Results and Evaluation, and make sure to specify who reviewed the results and what was discovered. This should be presented in the past tense and should be able to stand-alone from any attachments as a comprehensive narrative. Any attachments should be

supporting information only, and not required for a reviewer to understand the Results and Evaluation narrative. If data for the goal is not yet ready, you can save and return at a later date to enter the Results and Evaluation.

You have now completed the process of updating a Unit/College Goal and entering data. Select the “Done” button at the bottom of the goal plan item, and repeat this process for each goal.

Now we will update the Institutional Effectiveness Detail. The Institutional Effectiveness Detail includes a lot of information and should be checked carefully each year to make sure that all fields are up to date.



Planning

FY 2019-20 / UNIT/COLLEGE PLAN

Advancement

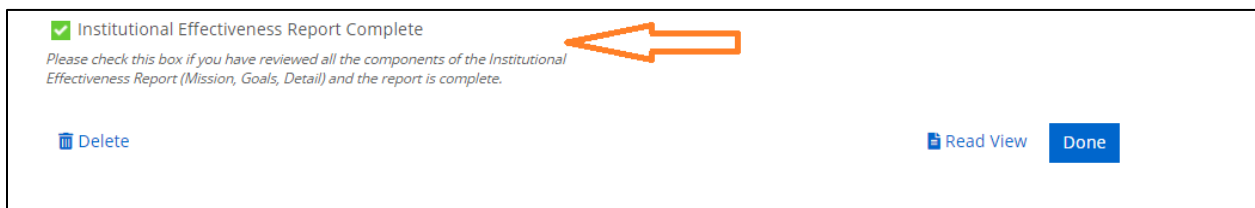
Plan Items Reports Documents

FILTER Sort Default + Plan Item

Advancement	Advancement: Unit/College Mission	7/1/19 - 6/30/20
Talent Management	Advancement: Goal 1:Unit/College Goal	7/1/19 - 6/30/20
Strategic Communications & Marketing	Advancement: Goal 2:Unit/College Goal	7/1/19 - 6/30/20
Alumni Relations	Advancement: Goal 3:Unit/College Goal	7/1/19 - 6/30/20
Development	Advancement: Goal 4:Unit/College Goal	7/1/19 - 6/30/20
Operations	Advancement: Goal 5:Unit/College Goal	7/1/19 - 6/30/20
Advancement IE Detail	Advancement: Institutional Effectiveness Detail	7/1/19 - 6/30/20

Show 10 Viewing 1-7 of 7

Once you have checked and made any necessary updates to the Goals and IE Detail, and reported Results and Evaluation data for each goal, you will mark your Institutional Effectiveness Report Complete using the check box at the bottom of the IE Detail item.



☒ Institutional Effectiveness Report Complete

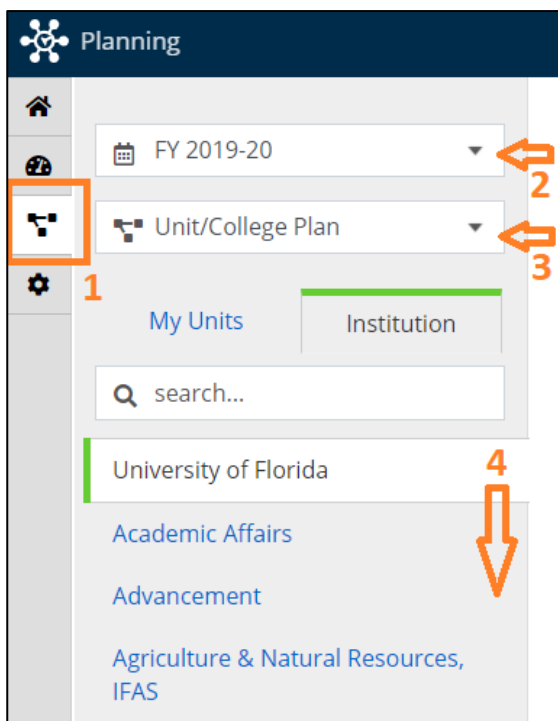
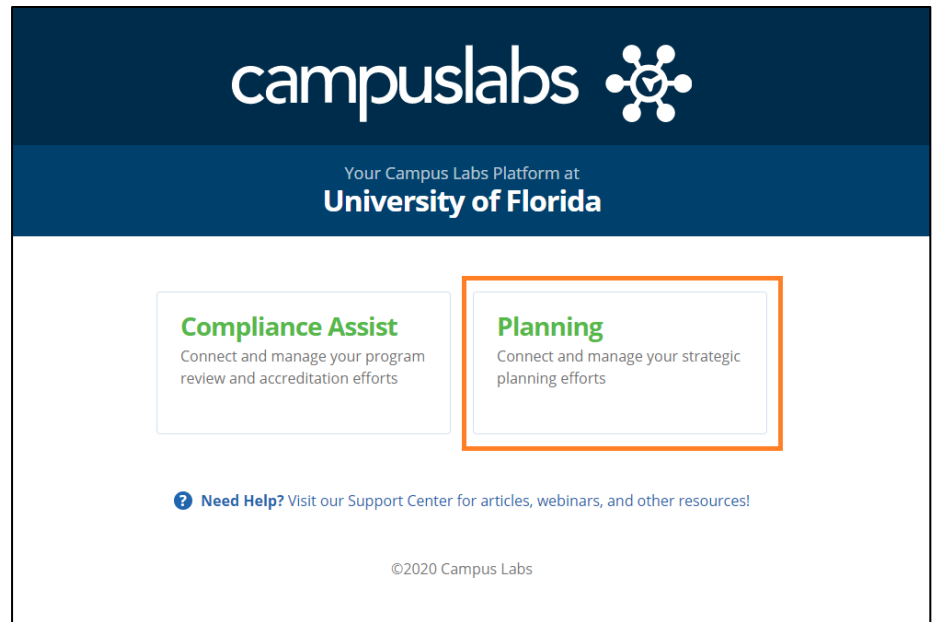
Please check this box if you have reviewed all the components of the Institutional Effectiveness Report (Mission, Goals, Detail) and the report is complete.

Delete Read View Done

Part 3: Running a Report

CLP can output PDFs, CSV, or word formats of IE reports from any year. This may be helpful if you are coordinating data collection from multiple individuals or units and would like to provide a template with the previous years information to help guide your collaborators. There are a number of ready-to-go reports available for your use. If you do not find a report that meets your needs, please contact Catherine Jaroch to have a new report created with your desired specifications.

Log into CLP
(<https://ufl.campuslabs.com>)
and enter your GatorLink
username and password,
then click “Planning”.



1. Select the org chart symbol at the far left.
2. Select the year being edited.
3. Select “Unit/College Plan”.
4. Navigate to the appropriate unit.

Once you have navigated to your unit, a list of plan items will appear to the right. Select the “Reports” Tab.

The screenshot displays the Planning system interface. On the left, a sidebar contains navigation options: 'My Units' and 'Institution'. The 'Institution' tab is active, showing 'University of Florida' and 'Advancement'. The main content area is titled 'FY 2019-20 / UNIT/COLLEGE PLAN' and 'Advancement'. It features three tabs: 'Plan Items', 'Reports' (which is highlighted with an orange box), and 'Documents'. Below the tabs, there is a 'FILTER' input field, a 'Sort' dropdown set to 'Default', and a '+ Plan Item' button. The main content area lists several advancement goals, each with a title, a description, and a date range. The goals are: 'Advancement Unit/College Mission' (7/1/19 - 6/30/20), 'Talent Management' (7/1/19 - 6/30/20), 'Strategic Communications & Marketing' (7/1/19 - 6/30/20), 'Alumni Relations' (7/1/19 - 6/30/20), 'Development' (7/1/19 - 6/30/20), 'Operations' (7/1/19 - 6/30/20), and 'Advancement IE Detail' (7/1/19 - 6/30/20). At the bottom, there is a 'Show' dropdown set to '10' and a 'Viewing 1-7 of 7' indicator.

Advancement	Unit/College Mission	7/1/19 - 6/30/20
Talent Management	Advancement Goal 1: Unit/College Goal 1	7/1/19 - 6/30/20
Strategic Communications & Marketing	Advancement Goal 2: Unit/College Goal 2	7/1/19 - 6/30/20
Alumni Relations	Advancement Goal 3: Unit/College Goal 3	7/1/19 - 6/30/20
Development	Advancement Goal 4: Unit/College Goal 4	7/1/19 - 6/30/20
Operations	Advancement Goal 5: Unit/College Goal 5	7/1/19 - 6/30/20
Advancement IE Detail	Advancement Institutional Effectiveness Detail	7/1/19 - 6/30/20

Once you select the “Reports” tab, you will see a list of available reports, each with a short description of what it includes. The “Reviewers Report – IE” is most commonly used. Open the drop down menu and select one of the following:

- **View Report or Print:** opens a new tab in your browser where the report will show up (This may take a few minutes). This is a good option if you want to preview the report before you download it. If you select this option, the new window will provide the option to download as a CSV, Word file, or you can select print, and then print to PDF.
- **Customize Dates:** allows you to change the year the report pulls information from.
- **CSV or Word Export:** Automatically downloads the report in the chosen format to your computer.

The screenshot displays the Planning system interface. On the left is a sidebar with navigation options: Home, FY 2019-20, Unit/College Plan, My Units, and Institution. The main content area is titled 'Advancement' and shows a list of reports. The 'Reviewer's Report - IE' is selected, and its dropdown menu is open, showing options: View Report, Customize Dates, CSV Report, Word Export, and Print. An orange arrow points to the 'View Report' option. The 'View Report' option is highlighted, and the dropdown menu is open, showing options: View Report, Customize Dates, CSV Report, Word Export, and Print. The 'View Report' option is highlighted, and the dropdown menu is open, showing options: View Report, Customize Dates, CSV Report, Word Export, and Print. The 'View Report' option is highlighted, and the dropdown menu is open, showing options: View Report, Customize Dates, CSV Report, Word Export, and Print.

Part 4: Helpful Resources & Tips

[Overview of Instructional Effectiveness Reporting at UF](#)

[Due dates for Administrative Units](#)

[Sample IE Reports](#)

Browser Matters! Safari works best when using CLP. Internet explorer does not work well.

Prepare your report outside of CLP, then simply copy content into CLP. This will ensure that if there are any issues with you internet connection or the CLP software while you are working in CLP, your work will not be lost.