



# GUIDE FOR INSTITUTIONAL EFFECTIVENESS PLANNING & REPORTING IN CAMPUS LABS PLANNING

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## TABLE OF CONTENTS

### **Institutional Effectiveness Planning & Reporting in Campus Labs Planning**

[Part 1: Overview](#)

[Part 2: Preparing an Institutional Effectiveness Report](#) (Includes [Connecting Unit/College Goals to Long-Range Presidential Goals](#))

[Part 3: Running a Report](#)

[Part 4: Helpful Resources & Tips](#)

### **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](mailto: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](mailto: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.

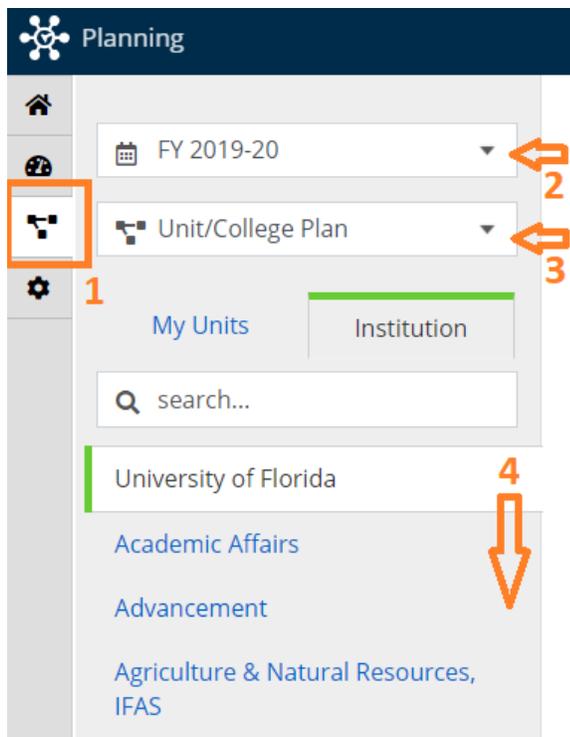
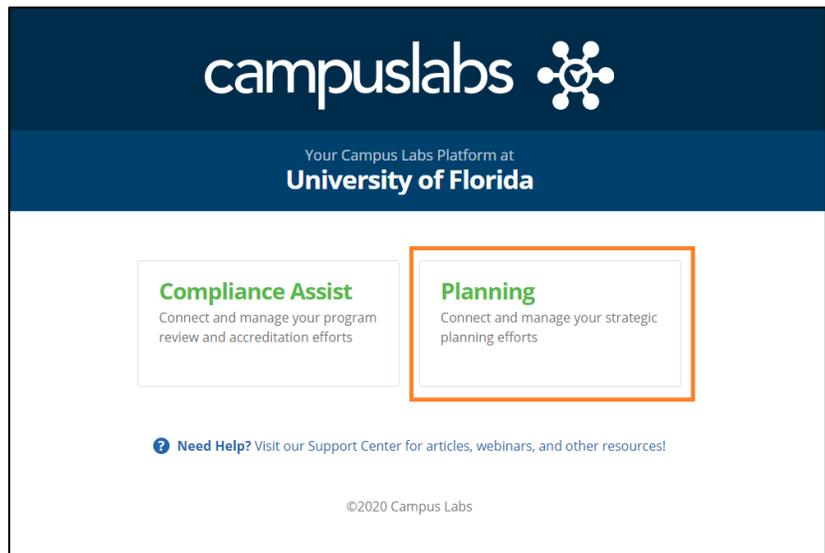
**July – Unit Deadline:** Following the rollover, units should make any updates to their IE plan in the new reporting year and enter Results and Evaluation data for Unit/College Goals. IE Plan updates might include changes to a Unit/College mission, responsible users, changes to a Unit/College Goal, 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:

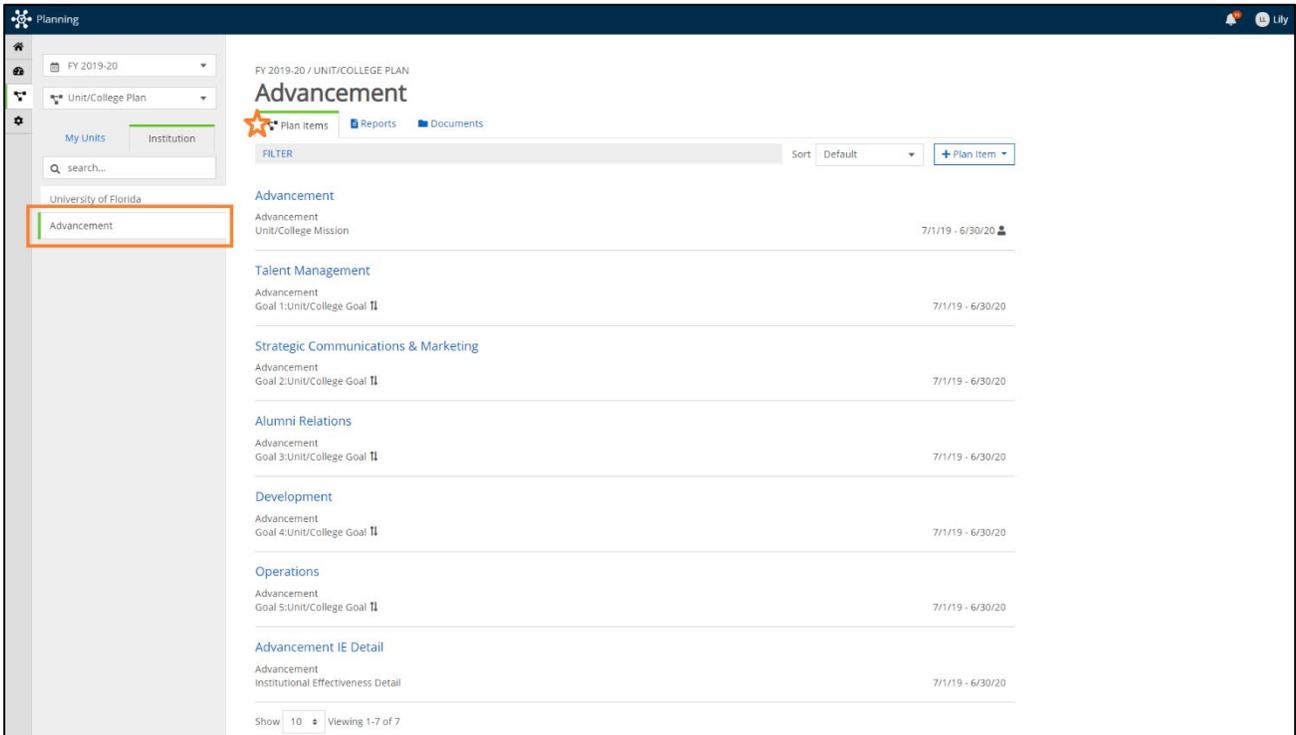
1. Unit/College Mission
2. Unit/College Goals
3. Institutional Effectiveness Detail

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

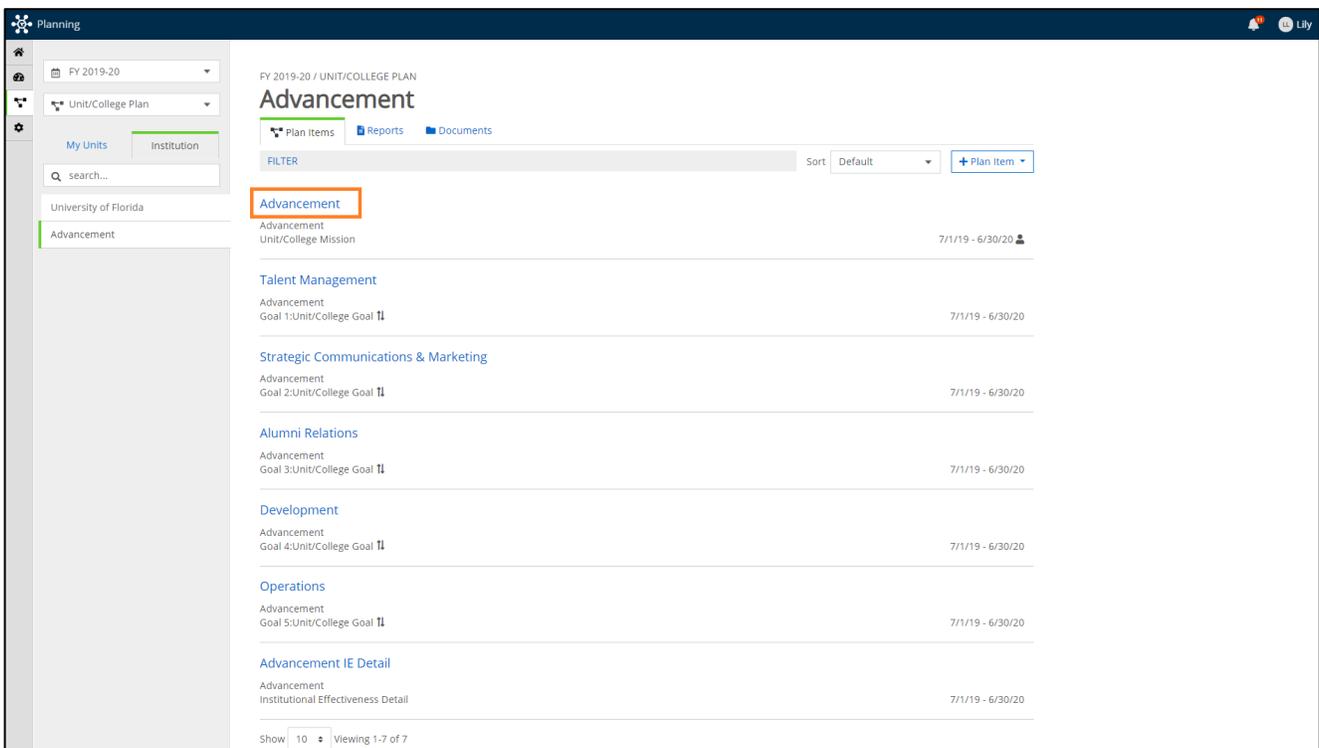


1. Select the org chart symbol at the far left.
2. Select the year being edited.
3. Select “Unit/College Plan”.
4. Navigate to the appropriate unit.

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).



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.



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.

The screenshot shows the 'Edit Plan Item' interface. The main form includes the following fields:

- Title \***: Advancement
- Mission Statement**: To be a catalyst for advancing University priorities through private support.
- Start \***: 07/01/2019
- End \***: 06/30/2020
- Progress**: (Dropdown menu)
- Unit/College \***: Advancement

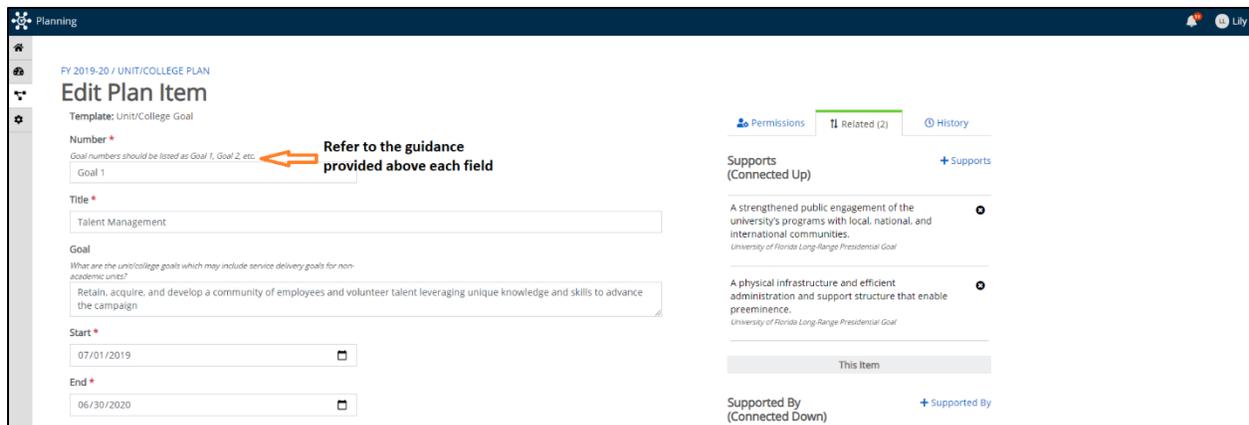
The 'Assign Responsible Users' modal window is open, showing:

- Responsible Users**: Mitchell, Tom (Reviewer)
- Available Users**: A list of users with roles:
  - Aagard, Tammy (Administrator)
  - Abend-David, Dror (Administrator)
  - Abernathy, Cammy (Reviewer)
  - Adams, Jane (Reviewer)
  - Adams, Rob (Administrator)
  - Adesogan, Aigiomwan (Administrator)
  - Albritton, Mary Alice (Administrator)
  - Allen, Anne (Administrator)
  - Allen-Ingram, Amber (Administrator)
  - Altmann, Lori (Administrator)

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.

The screenshot shows the 'Advancement' plan item list. The 'Talent Management' goal is highlighted with a red box. The list includes the following items:

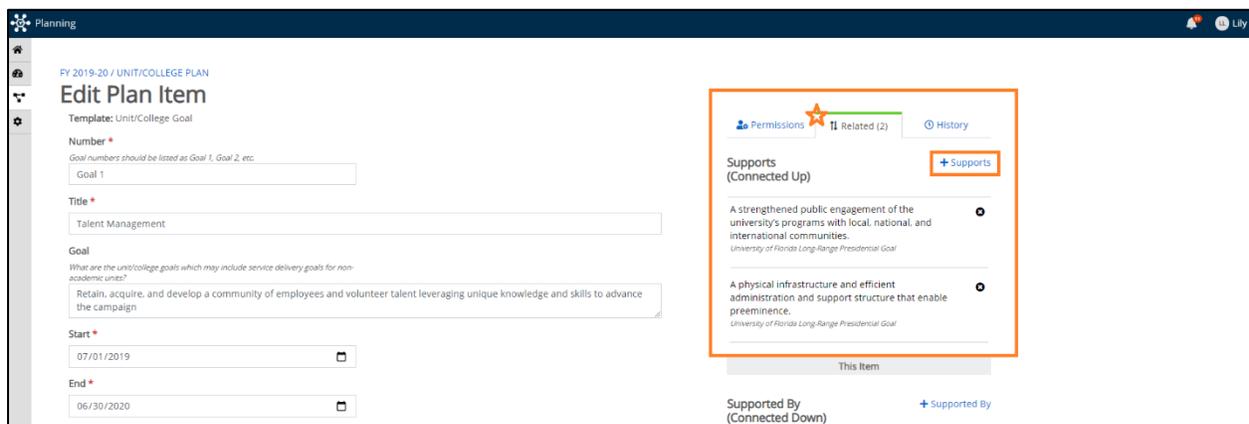
- Advancement**: Unit/College Mission (7/1/19 - 6/30/20)
- Talent Management**: Advancement Goal 1:Unit/College Goal (7/1/19 - 6/30/20)
- Strategic Communications & Marketing**: Advancement Goal 2:Unit/College Goal (7/1/19 - 6/30/20)
- Alumni Relations**: Advancement Goal 3:Unit/College Goal (7/1/19 - 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)



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.



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 shows the 'Select a Supports (Related UP) Item' page. On the left, there is a navigation menu with categories like 'Academic Affairs', 'Advancement', etc. The main area displays a list of goals for the University of Florida. The first goal is 'The University of Florida offers and exceptional academic environment for all.' A blue '+' button is highlighted next to this goal. On the right, there are sections for 'Supports (Connected Up)' and 'Supported By (Connected Down)'. A 'Back to Plan Item' button is highlighted at the bottom right.

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.

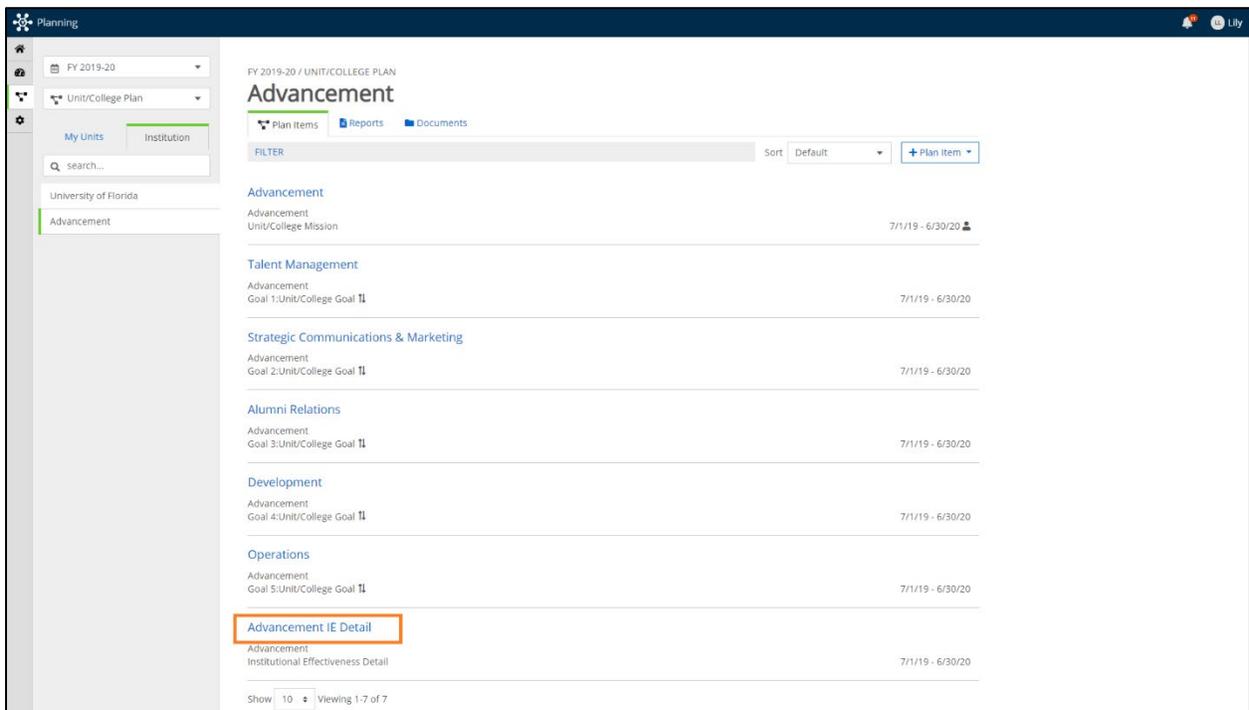
Continue updating your Unit/College goal, including the Action Items, Measures of Action Items, Time Period of Action Items, and Resources of Action Items.

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.



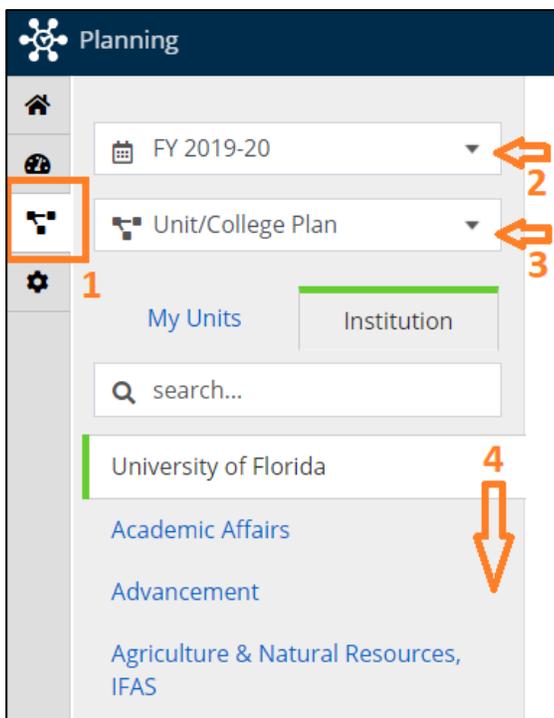
Once you have checked and made any necessary updates to the Goals and IE Detail, and reported Results and Evaluation data for each goal, you will mark your Institutional Effectiveness Report Complete using the check box at the bottom of the IE Detail item.



### 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' section is active, showing 'University of Florida' and 'Advancement'. The main content area is titled 'FY 2019-20 / UNIT/COLLEGE PLAN' and 'Advancement'. Below the title, there are three tabs: 'Plan Items', 'Reports' (which is highlighted with an orange box), and 'Documents'. A 'FILTER' input field and a 'Sort' dropdown menu (set to 'Default') are visible. A '+ Plan Item' button is located on the right. The main content area lists several advancement goals, each with a title, description, and a date range of '7/1/19 - 6/30/20'. The goals listed are: 'Advancement Unit/College Mission', 'Talent Management Advancement Goal 1: Unit/College Goal', 'Strategic Communications & Marketing Advancement Goal 2: Unit/College Goal', 'Alumni Relations Advancement Goal 3: Unit/College Goal', 'Development Advancement Goal 4: Unit/College Goal', 'Operations Advancement Goal 5: Unit/College Goal', and 'Advancement IE Detail Advancement Institutional Effectiveness Detail'. At the bottom, there is a 'Show 10' dropdown and 'Viewing 1-7 of 7'.

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 'Advancement' section of the Planning system. The left sidebar shows navigation options for 'FY 2019-20', 'Unit/College Plan', and 'Institution'. The main content area is titled 'Advancement' and contains a list of reports. The 'Reviewer's Report - IE' report 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 page also includes a search bar, a 'Sort' dropdown, and a '+ Report' button.

## **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.