

Online Strategic Planning System

This document describes the use of the Strategic Planning online input/contribution system. The system allows for multiple users to view and collaborate on the various parts of a Strategic Plan while maintaining data integrity.

Logging In

Authentication is done through the GVSU Central Login Service. Upon accessing the Strategic Planning link (<http://intranet.gvsu.edu/strategicplanning>), the system redirect the user to the following login screen for authentication:

Grand Valley State University

GVSU Central Login Service

Sign in to your account

User Name

Password

Sign In

☐ Stay Signed In

General Information

You are entering a secure login area in which designated applications at GVSU are allowed to use your login credentials entered on this site for authentication. This allows you to login once with your network ID and password and have access to designated applications without logging in multiple times. GVSU Information Technology will continue to review applications that meet the requirements for this type of authentication but cannot guarantee all applications have the ability to do so.

Trouble Logging In?

Contact the Information Technology Helpdesk at 616-331-2101 or visit <http://gvsu.edu/it/>

Reset / Change Your Password

Click [here](#) to go to myBanner to change your password.

1 Campus Drive
Allendale, MI 49401-9403
USA - (616) 331-5000

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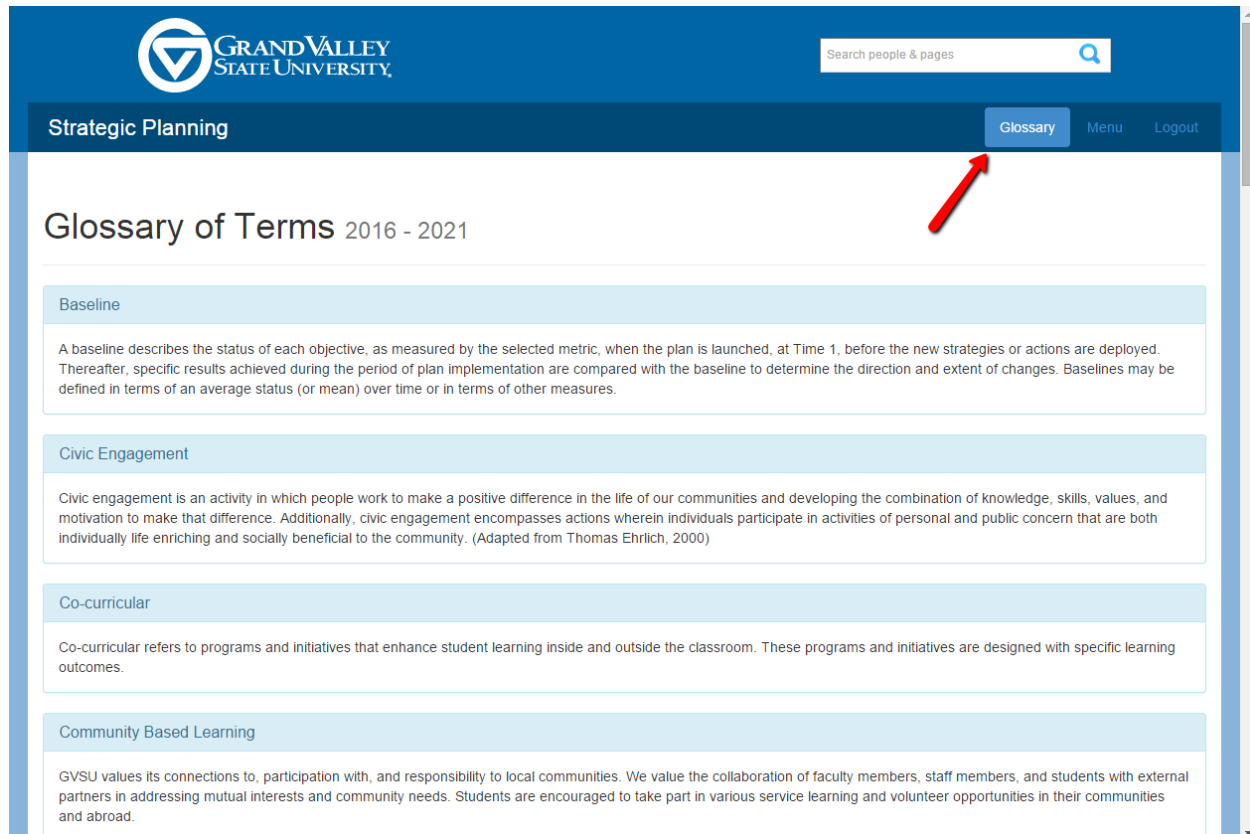
The user's credentials are then determined and the appropriate screens are displayed to them within the online Strategic Planning system. There are four access levels that can be associated with a user account.

1. Admin
 - a. An Admin account has access to any aspect of the site. This document will not be used to describe the options available to that user group.
2. Group Admin

- a. Group Admins have control of the Strategic Plan for the entity with which they are associated. They have the ability to “Finalize” the plan when the work has been concluded.
3. Standard
 - a. A Standard user has the ability to edit any aspect of the Strategic Plan for the entity with which they are associated. (e.g. A user associated with CLAS can only edit that Strategic Plan)
4. View
 - a. This access level allows a user to view any of the plan for the entity with which they are associated.
5. If a user is not defined in the system but has a valid GVSU Faculty/Staff network account, they are allowed to view the finalized sections of the plan for any of the entities (University, Divisions, Colleges, etc.)

Glossary

There is a glossary of terms that is accessible through the Glossary menu item in the upper right corner of the screen. Common terms used in the system and in the plans are defined on this screen.

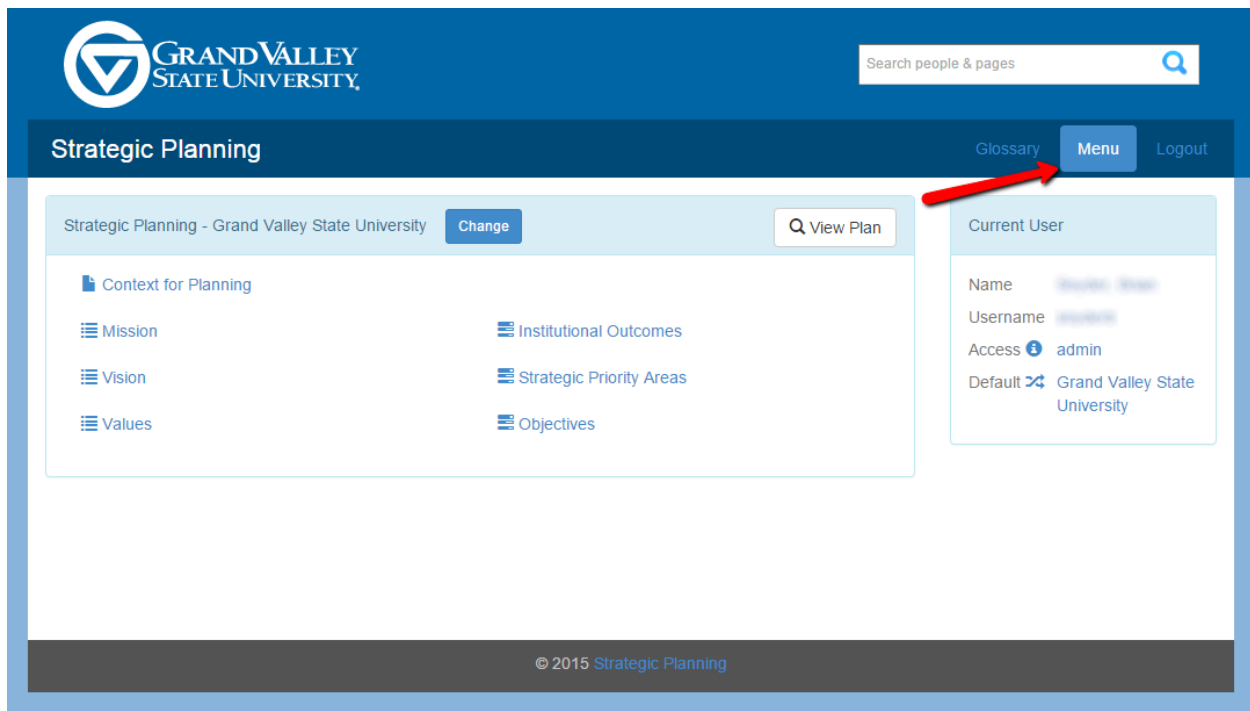


The screenshot shows the Grand Valley State University (GVSU) Strategic Planning interface. At the top, there is a blue header with the GVSU logo on the left, a search bar labeled "Search people & pages" in the center, and navigation links for "Strategic Planning", "Glossary", "Menu", and "Logout" on the right. A red arrow points to the "Glossary" link. Below the header, the main content area is titled "Glossary of Terms 2016 - 2021". This area contains four sections, each with a title and a definition:

- Baseline**: A baseline describes the status of each objective, as measured by the selected metric, when the plan is launched, at Time 1, before the new strategies or actions are deployed. Thereafter, specific results achieved during the period of plan implementation are compared with the baseline to determine the direction and extent of changes. Baselines may be defined in terms of an average status (or mean) over time or in terms of other measures.
- Civic Engagement**: Civic engagement is an activity in which people work to make a positive difference in the life of our communities and developing the combination of knowledge, skills, values, and motivation to make that difference. Additionally, civic engagement encompasses actions wherein individuals participate in activities of personal and public concern that are both individually life enriching and socially beneficial to the community. (Adapted from Thomas Ehrlich, 2000)
- Co-curricular**: Co-curricular refers to programs and initiatives that enhance student learning inside and outside the classroom. These programs and initiatives are designed with specific learning outcomes.
- Community Based Learning**: GVSU values its connections to, participation with, and responsibility to local communities. We value the collaboration of faculty members, staff members, and students with external partners in addressing mutual interests and community needs. Students are encouraged to take part in various service learning and volunteer opportunities in their communities and abroad.

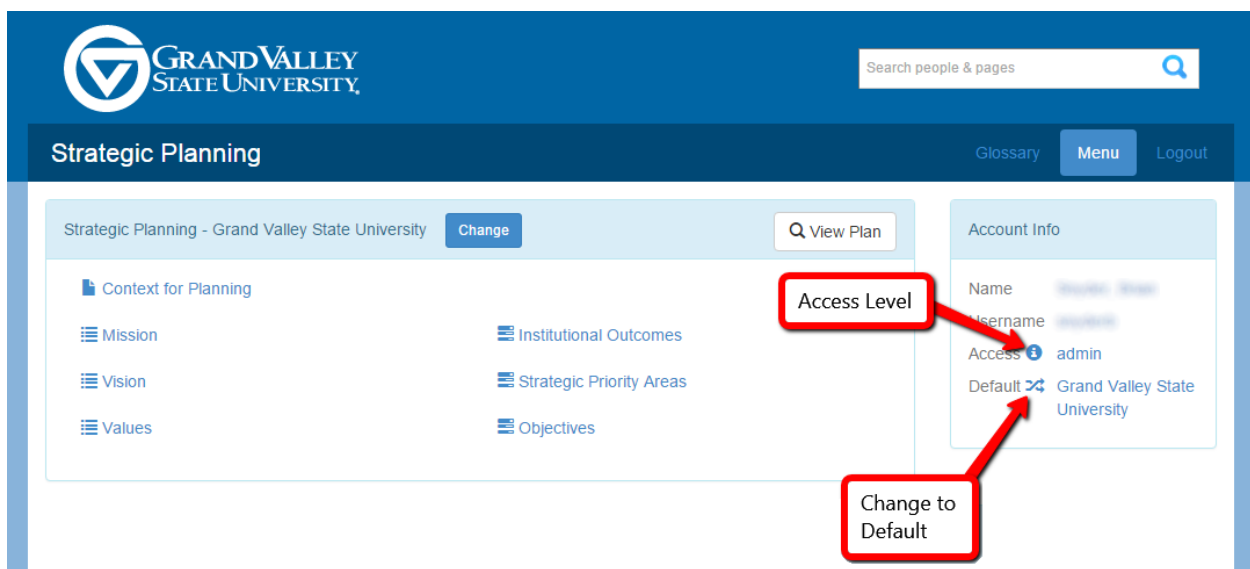
Main Menu

The main menu is used to access the various pieces that compose an entities Strategic Plan. The button to access the menu can be found in the upper right corner of the screen.

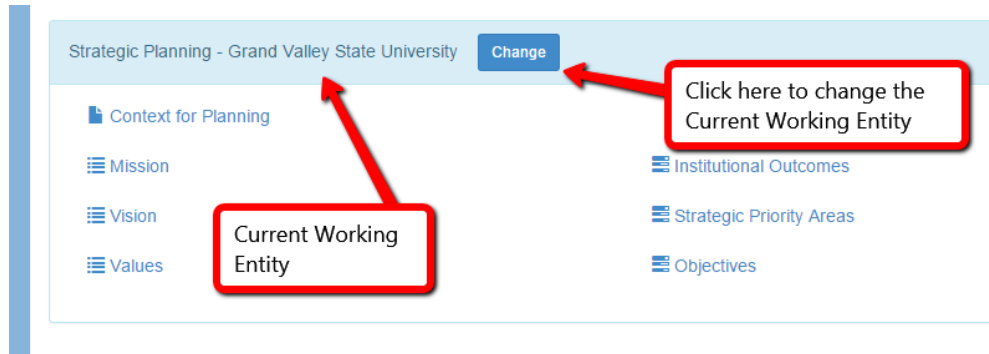


Account Info

The Account Info panel displays information about the user that is currently logged into the project. Clicking the information icon next to the "Access" label displays a description about the access level that was granted to the user. The entity that a user has been assigned to is displayed by the "Default" label. If a user has navigated away from their "Default" entity, clicking the "Change to Default" icon will return them to their "Default" entity.

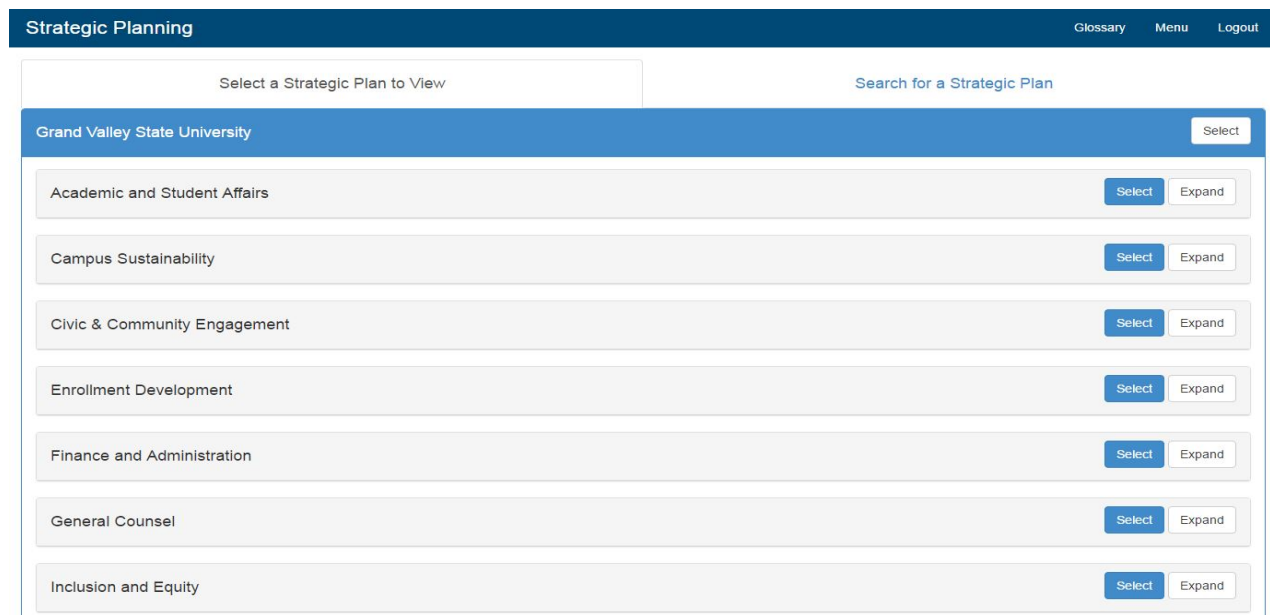


This screen also indicates which entity you are currently working with/viewing. And has a button to change that entity in the sub-header.



Changing the Current Working Entity/Searching for a Strategic Plan

Clicking the “Change” button described above will present you with a series of screens that allow you to drill into the various entities that make up Grand Valley State University. Users can also utilize the search function located in the top right corner in the image below to find a specific strategic plan.



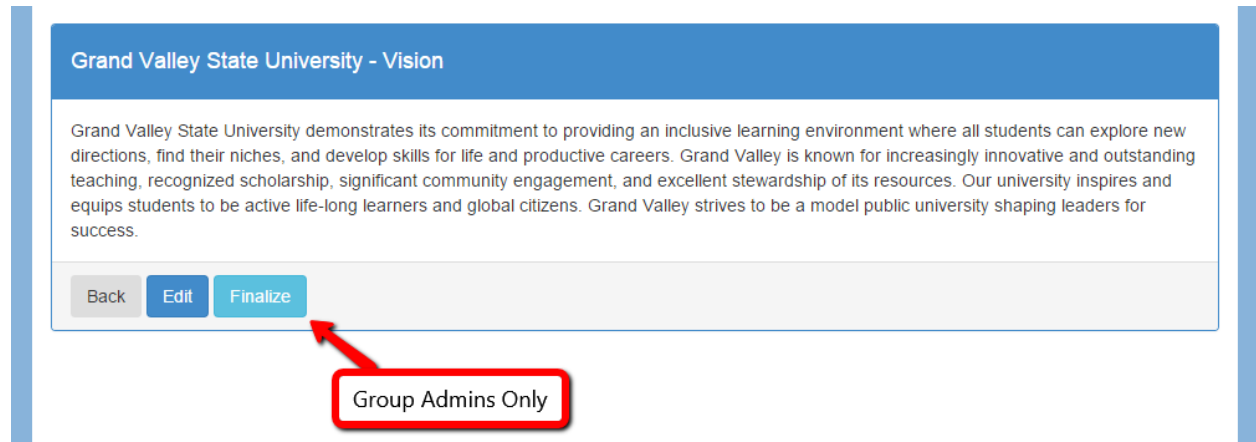
There are two buttons accompanying each of the entities. The “Select” button sets that entity as your “Current Working Entity” while the “Expand” button displays all of the entities that are under the associated entity. E.g. All of the entities displayed in the screen shot above are directly associated with the Institution (GVSU).

Working with a Strategic Plan

This section of the manual describes the screens used to create/maintain a Strategic Plan. Certain maintenance/edit screens of the plan function similarly and will be described jointly.

Editing the Context for Planning, Mission, Vision, and Values sections

The Context for Planning, Mission, Vision, and Values sections function in a similar fashion and will be described as one unit. The instructions described in context of the Vision section are applicable to each of the other sections. Upon accessing a section, a user with rights to edit the plan will be presented with the following screen. Please note that only Group Admins will be presented with the “Finalize” button.



The “Back” button will return the user to the previous screen while clicking the “Edit” button will present the user with the following screen for manipulating the data.

Edit - Vision

Normal text ▼
Bold
Italic
Underline

Grand Valley State University demonstrates its commitment to providing an inclusive learning environment where all students can explore new directions, find their niches, and develop skills for life and productive careers. Grand Valley is known for increasingly innovative and outstanding teaching, recognized scholarship, significant community engagement, and excellent stewardship of its resources. Our university inspires and equips students to be active life-long learners and global citizens. Grand Valley strives to be a model public university shaping leaders for success.

Back
Lock
Save

Notes
Add

This is a sample note.
Created By: snyderb - May 22, 2015 3:37 PM

The anatomy of the edit screen includes a simple editor for adding formatting to the text, the option for a user to “Lock” the data for editing purposes and a dialog for adding notes.

Editing the Outcomes and Strategic Priority Areas

The Outcomes and Strategic Priority Areas function is a similar fashion and will be described jointly. The Strategic Priority Area display screen offers options to “Add Strategic Priority Area”, “Edit” an existing Strategic Priority Area or “Finalize” a Strategic Priority Area. Note that the “Finalize” button is only available to users with the “Group Admin” access level.

Grand Valley State University - Strategic Priorities
Add Strategic Priority Area

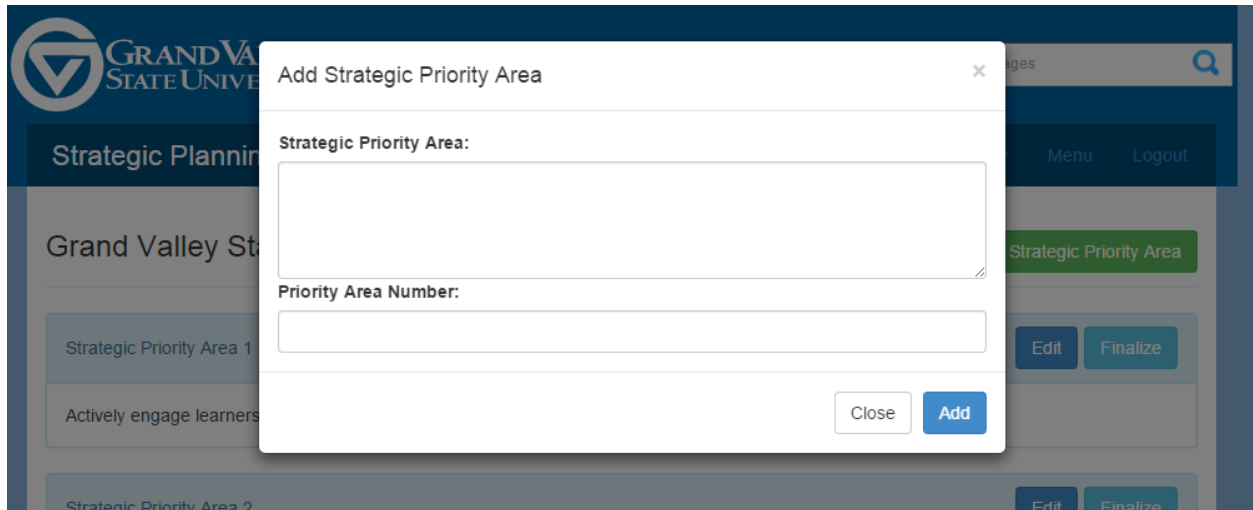
Strategic Priority Area 1
Edit
Finalize

Actively engage learners at all levels.

Strategic Priority Area 2
Edit
Finalize

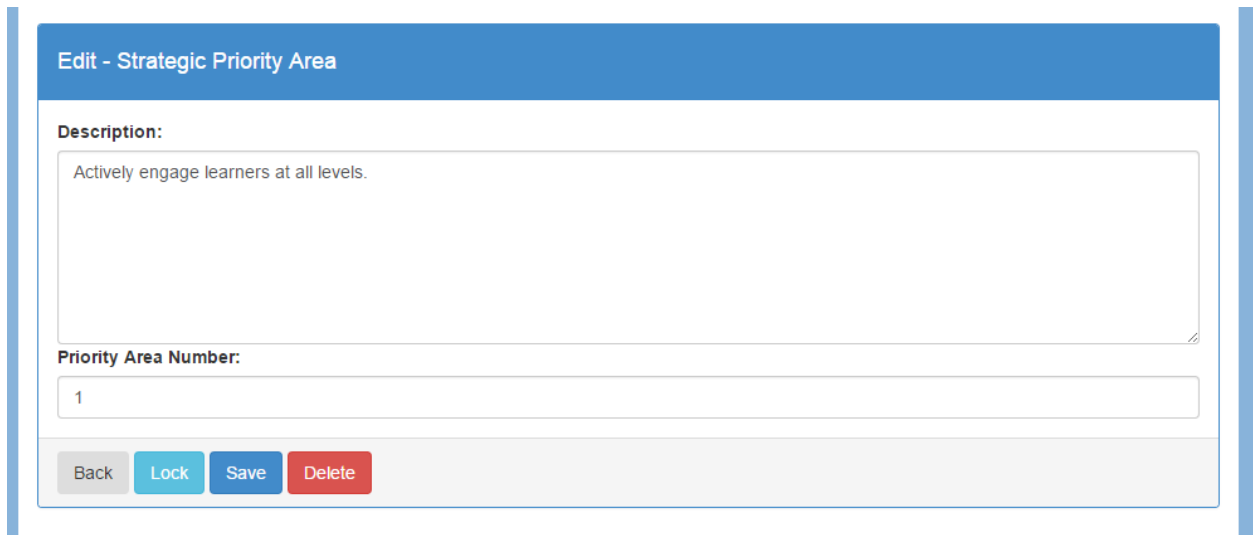
Further develop exceptional personnel.

Clicking the “Add Strategic Priority Area” button presents a user with a basic dialog box for creating a new record.



The screenshot shows a web application interface for Grand Valley State University. A modal dialog box titled "Add Strategic Priority Area" is centered on the screen. The dialog has a close button (X) in the top right corner. It contains two input fields: "Strategic Priority Area:" with a large text area, and "Priority Area Number:" with a single-line text input. At the bottom right of the dialog are "Close" and "Add" buttons. The background interface shows a sidebar with the university logo and a main content area with a table of Strategic Priority Areas, including one with the description "Actively engage learners".

Editing a Strategic Priority Area offers the user the options of locking the record for editing, saving any changes or deleting the record.



The screenshot shows the "Edit - Strategic Priority Area" form. The form has a blue header bar with the title "Edit - Strategic Priority Area". Below the header, there is a "Description:" label followed by a large text area containing the text "Actively engage learners at all levels.". Below the text area is a "Priority Area Number:" label followed by a single-line text input containing the number "1". At the bottom of the form are four buttons: "Back" (grey), "Lock" (light blue), "Save" (dark blue), and "Delete" (red).


Adding/Editing Objectives

Objectives are displayed in a grid layout with associated Outcomes listed across the top of the grid and Strategic Priority Areas listed in the left column. Each Objective has an Edit button and after the last Objective listed in a grid section there is a button for adding a new Objective.

Grand Valley State University - Objectives

Strategic Priority Areas	Outcomes				
	A. Grand Valley's learning environment is personal, challenging, and transformational supporting excellent academic programs and co-curricular opportunities.	B. Grand Valley is diverse and inclusive.	C. Grand Valley has mutually beneficial relationships, partnerships, collaborations, and connections with local, state, national, and world communities.	D. Grand Valley supports innovative teaching, learning, integrative scholarly and creative activity and the use of new technologies.	E. Grand Valley strategically allocates its fiscal, human, and other institutional resources.
1. Actively engage learners at all levels.	1.A.1 Edit	1.B.1 Edit	1.C.1 Edit	1.D.1 Edit	1.E.1 Edit
	1.A.2 Edit	1.B.2 Edit	1.C.2 Edit	1.D.2 Edit	1.E.2 Edit
	Add Objective	Add Objective	At least 10% of academic courses incorporate community-based learning experiences.	Add Objective	1.E.3 Edit
			Baseline: Fall of 2014 is 2.3%.		1.E.4 Edit
			Add Objective		1.E.5 Edit
2. Further develop exceptional personnel.	2.A.1 Edit	2.B.1 Edit	2.C.1 Edit	2.D.1 Edit	2.E.1 Edit
	2.A.2 Edit	2.B.2 Edit	Add Objective	2.D.2 Edit	2.E.2 Edit
	Add Objective	Add Objective		Add Objective	2.E.3 Edit

The Objective edit screen lists the Strategic Priority Area, Outcome and if applicable the Institutional Objective that an Objective is associated with at the top of the page. After that information, there are editable fields that make up an objective. There are buttons at the bottom of the screen that allow the user to “Lock” an Objective for editing, “Save” the changes, “Delete” an Objective and “Finalize” an Objective once it’s complete. Please note that the “Finalize” button is only available to users with the “Group Admin” access level.


**GRAND VALLEY
STATE UNIVERSITY**

Search people & pages

Strategic Planning

Glossary

Menu

Logout

Edit - Objective

Strategic Priority Area 1: Actively engage learners at all levels.

Outcome B: Grand Valley is diverse and inclusive.

Objective:
GVSU's diversity of student, faculty, staff, and administration increases by 18% to reflect the populations of West Michigan.

Baseline:
Baseline diversity of combined faculty, staff, and administrators in 2014-15 is 84% non-Hispanic white.

Metric:

Timeframe Start: - Timeframe End: - Objective Number: 1.B. 1

Back Lock Save Delete Finalize

Edit - Reporting

Add Reporting

Reporting has not been entered yet.

After an objective has been “Finalized”, the fields displayed above become locked and an “Add Reporting” button becomes visible. Clicking the “Add Reporting” button brings up the following dialog that allows a user to submit the current state of progress towards obtaining the selected Objective.

Strategic Planning
Glossary
Menu
Logout

Objective Reporting

Objective 1.B.2: Retention rates between freshman and sophomore years and sophomore and junior years for first-generation and other non-traditional undergraduate students meet or exceed the retention rates of traditional undergraduate students.

Year to Attribute this Finding: (publicly reported) ⓘ

-

Status: (publicly reported) ⓘ

-

Brief Progress Update: (publicly reported) ⓘ

Findings Since Last Reporting: (or upload a PDF - not publicly reported) ⓘ

Findings File Title & PDF Upload: (not publicly reported - PDF only) ⓘ

Choose File No file chosen

Analysis of Findings: (not publicly reported) ⓘ

Next Course of Action: (not publicly reported) ⓘ

Sharing of Findings: (not publicly reported) ⓘ


Additional Comments: (optional - not publicly reported) ⓘ

Back
Lock
Save
Delete
Finalize

Please note that you can save work while completing the reporting for each objective ("Save" button at the bottom of the Objective Reporting page) and come back to work on it later.

The Objective Reporting must be finalized before everything is complete (click "Finalize" button at the bottom of the Objective Reporting page). Once "Finalize" is clicked, you will not be able to edit the reporting further.

If you have questions about the various fields on the Objective Reporting page, please click the Information button for each field, represented by the lower case "i" circled in blue.



GRAND VALLEY
STATE UNIVERSITY

Search people & pages

Strategic Planning

GlossaryMenuLogout

Strategic Planning -

Change

View Plan

Context for Planning

Mission

Vision

Values

Outcomes

Strategic Priority Areas

Objectives

Publish this Plan

Account Info

Name

User

Access ⓘ admin

Default ⓘ Grand Valley State University

Admin Menu

Manage Entities

Divisions

Colleges

Units

Reports

Finalized Plans

Keyword Search

Unaligned Objectives

Configuration

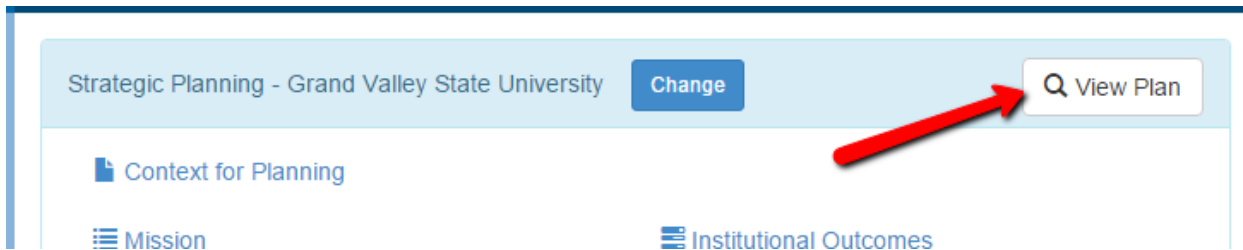
Users

Cycles

In order to make the plan visible on the Strategic Plan Index website, all items must be individually finalized and then the plan must be published. To publish the plan select "Publish this Plan" button shown above. Note that only finalized items will be visible when the plan is published.

Viewing a Strategic Plan

An entities plan is viewable via the "View Plan" button on the "Menu" page.



A user can view any entities plan by using the "Change" button. Then after selecting the desired entity, the plan can be viewed by clicking the "View Plan" button.

The Strategic Plan View:

