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Strategic Performance Management (SPM) Online Tool Manual

The SPM Online Tool is a web-based management tool for a strategic performance management (SPM) system. It allows users to create, track and report progress on Action Plans related to Milestones, Strategies, and Goals in an agency’s strategic performance management system. Levels of users include: (1) a State Administrator, (2) Division Leaders and Division Process Managers, and (3) Unit Leaders and Unit Process Managers within an agency.

Go to SPM Online Tool: http://www.adi.org/spm/app/Login.aspx

Login with your username and password (Note: usernames are assigned by the system)

STATE ADMINISTRATOR
The State Administrator oversees the system and has the highest level of access and permissions. The State Administrator can create and edit Divisions, Division Leaders, Units, Division process managers, and Unit Leaders. The State Administrator can also assign Milestones to Divisions and print reports.

User Credentials
User logins are automatically assigned by the system. The naming convention is State Initial, dl for Division Leader or ul for Unit Leader, and number as in ard127. Passwords are assigned when an account is created.

A State Administrator can view or print a list of users and passwords by clicking on Manage user Credentials on the Main Menu of the State Administrator.
Create your Vision, Mission, and Values.

- Click on Vision – Mission – Goals – Strategies from the Main Menu.

The State Administrator can update and save the State’s Vision, Mission, and Values.
Creating and Customizing Goals

- Manage Goals
- Click Create a new Goal

Manage Goals

1. Select a goal from the list below
2. Select a goal modifier

- Input in your Sort Number, Goal, and Goal Explanation.

Manage Goals

1. Select a goal from the list below
2. Select a goal modifier

Goal: 1 Every student will start strong with a foundation of knowledge, skill, attitude, and habit in grades preschool–3.

- Save Goal Changes
- Then, you may move on to the rest of the Goal Modifiers or return to the main menu.
Goal Modifiers

1. Goal Meaning
   - Enter in Meaning of the Goal for the Students, Families, and Educators.
• Next is the **Goal Responsibility, Conflicts, and Gaps**.

---

**Goal: 1** Every student will start strong with a foundation of knowledge, skill, attitude, and habit in grades preschool - 3.

**Goal Responsibility, Conflicts, and Gaps**

**State Role and Responsibility**
Ensure accountability system incentives district/school actions toward goal.

**District Role and Responsibility**
Utilize growth data to make appropriate district improvement.

**School Role and Responsibility**
Utilize growth data to make appropriate school improvement and educator and leader support decisions.

**Identify Conflicts and Gaps**
1. ADI needs to define growth
2. ADI needs to clearly communicate growth measures and metrics.
3. ADI needs to provide data literacy training.

---

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- The third section is the **SWOT Analysis**.

<table>
<thead>
<tr>
<th>SWOT Analysis</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Strength</strong></td>
<td></td>
</tr>
<tr>
<td>Schools desire a growth measure</td>
<td></td>
</tr>
<tr>
<td><strong>Weakness</strong></td>
<td></td>
</tr>
<tr>
<td>Determining the best growth model</td>
<td></td>
</tr>
<tr>
<td><strong>Opportunity</strong></td>
<td></td>
</tr>
<tr>
<td>Communicate student's progress</td>
<td></td>
</tr>
<tr>
<td><strong>Threat</strong></td>
<td></td>
</tr>
<tr>
<td>Miscommunication</td>
<td></td>
</tr>
</tbody>
</table>

**Add SWOT Strength**
**Add SWOT Weakness**
**Add SWOT Opportunity**
**Add SWOT Threat**
Save Performance Indicator

- The final goal modifier is the Performance Measures
- Include your Performance Indicator, Data Source, and Baseline Year

Goal: 1 Every student will start strong with a foundation of knowledge, skill, attitude, and habit in grades preschool-3.

- Save Performance Indicator
- Add a Target Year
• Input your Target Year and Target
• Save Target Year

Manage Strategies
• Manage Strategies
• Select a Goal
• Click on Add Strategy

**Goal # 1 - Every student will start strong with a foundation of knowledge, skill, attitude, and habit in grades preschool-3.**
• Once you have filled out your Sort, Strategy, and Strategy Explanation click on **Save Strategy**

**Strategy Performance Measures**

• Within the **Manage Strategies** section select a Goal and then a **Strategy**.

• Click on **Add a Performance Indicator**

**Manage Strategies**

**Goal # 1** - Every student will start strong with a foundation of knowledge, skill, attitude, and habit in grades preschool–3.

Within the **Manage Strategies** section select a **Goal** and then a **Strategy**.

Click on **Add a Performance Indicator**

• Fill out the Indicator, Data Source, and Baseline Year.

**Performance Measures**

**Performance Indicator**

Percentage of increase in academic growth by grade bands.

**Data Source**

ACT Aspire

**Baseline Year**

2017-2018

**Baseline**

3

*Check the box if the number is a percent %

**Save Performance Indicator**

• Hit **Save Performance Indicator**
Developing new Milestones

- Select a Milestone Year
- Select a Goal
- Select a Strategy

Milestone Development

- When finished, select **Save – Update this Milestone**
- This Milestone will now be under development and can be selected by all Admins or the Division Leader of the user who created it.
- Admins, Division Leaders, and Unit Leaders can add comments to Milestones under Development.
- An Admin can move an approved milestone from the Development environment into the Production environment. After a Milestone is moved using the “Commit to Production” button, it can not be brought back into development. An admin can however continue to edit it as needed.
Managing Division

- Click on Manage my Divisions from the Main Menu. On the next screen Click on Manage Divisions.

Manage my Division

- Click on Add New Division. Enter the information and click Save-Update. If Division Leaders have already been entered, click on the arrow in the Division Leaders field to select the Division Leader. Division Leaders can also be selected later. Click Save - Update to save entered information.

Add - Update a Division

Division Name:

Division
Description:

Division Leaders:

* Division Leader is optional at this time.

Save - Update  Cancel

- Click on Manage Division Leaders to add or update a Division Leader.
- Click on Add New Division Leader. First Name, Last Name and Password are required fields. Division Leaders can also be assigned to Divisions on this screen as well. Click on the arrow in the Divisions field to select a Division.

Add - Update a Division Leader

First Name:

Last Name:

Email:

Phone:

Login:

Password:

Position:

Divisions:

* Division is optional at this time,

Save - Update  Cancel
Managing Units

- **Click on Mange Units** to add a Unit. [Divisions MUST be entered before a Unit can be added.]

**Manage my Division**

- **Click on Add New Unit**
  - Add Unit information and click **Save – Update**

**Add - Update a Unit**

- **Click on Manage Unit Leaders**
  - **Click the arrow** to select a Division from the drop-down list. Unit Leaders are added in the same way.

**Manage my Division**

- **Click on Add New Unit Leader**. First Name, Last Name and Password are required fields and must be entered.
  - **Click Save – Update**
Click Division Process Manager to add or remove a Division Process Manager from a Division.

Manage my Division

A Division Process Manager can be any Unit Leader or Team Member from within the Division. A Division Process Manager has the same access level as a Division Leader.

Assigning Milestones
The State Administrator assigns Milestones to Divisions. [Note: Milestones MUST be assigned to Divisions before they can be assigned to a Unit.]

Assign Milestones to Divisions

Select a Milestone Year
Select a Goal
Select a Strategy
Assign Milestones to Divisions

- **Select a Milestone**

<table>
<thead>
<tr>
<th>Milestone</th>
<th>Division</th>
<th>Unit</th>
<th>End Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.1.1 - Develop a comprehensive needs assessment including supports for implementation of a student-focused learning system. (2018)</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

- **Click on the arrow in the Assign Division field** to select the Division responsible for this Milestone from the drop-down list.

- **Save Changes**

  [Note: To assign a Milestone to a Unit, the Division Leader or Division Process Manager should login and make the assignment.]
Creating Resources

The State Administrator creates resource tags that will be attached to each action created by a Unit Leader or UPM. A resource tag may indicate a source of funding or another category decided by your state.

- From the menu, click on Resources
- Select the Milestone Year to add a resource to
- Click on Add a new Resource
- Write out the Resource that you would like to be made available and hit Add

**Resources**

1. Select a Milestone Year to view Resources
2. Click on Add Resource to implement a new Resource Tag

Select Milestone Year: 2017 - 2018

Resources List

- CSGA Funds
- Title 1 Dispersed Payment
- Fiscal Year 2019 Preschool for All Expansion 3-5
- Competency-Based High School Graduation
- Fiscal Year 2019 Early Childhood Block Grant – Preschool for All 3-5

Add a new Resource

Clicking on the x next to a resource’s name will remove it from all Action plans that have referenced it.
Manage Glossary
The State Administrator can Create, Customize, and View SPM Terms and Definitions in the Manage Glossary Terms section. The Glossary is prepopulated with SPM related terms. However, an admin may add, edit, or review the elements in their state’s glossary. Other users may view these terms on the SPM Glossary Report.
- From the main menu, click on Manage Glossary Terms

To add a New Term
- Click on New Term
- Fill out the SPM Term and Term Definition fields
- Hit Save New Term when finished or Cancel to close out of your New term without saving.

To edit a Term
- Click on Edit this Term
- Change the entry in the field that you would like to change
- Hit Save this Edit to change the record or cancel to close out of your edit without saving.
Comments

The State Administrator and Division Leaders may write comments on the Action Plan Statuses recorded by Unit Leaders and Unit Process Managers. Only one comment can be provided on an Action Status. When the comment is saved an automated email will be sent to the Unit Leader responsible for the status. The Unit Leader can then write a reply, and it will be emailed the writer of the comment.

To write a Comment

- From the main menu, click on Comments
- Select the Division, Unit, and Action Plan to specify which set of Statuses you would like to see.
- Select the Action Plan Status that you would like to comment on.
- Hit Add Comment
- Write out your comment and then hit Save.
Manage Users

Manage Users allows the State Administrators, Division Leaders, and Unit Leaders to add or update another User’s role and access to a Division and Unit.

- **Assign**: Will add the newly selected role to the user’s account. There can still only be 1 DL and UL per Division and Unit. Assigning a new DL or UL will remove the old one.
- **Reassign**: Will change the first role selected to the new one indicated.
- The list of available roles is based on the user’s current access level. The State Administrator may update or add a role to make an account into a Division Leader, Unit Leader, or Team Member. A Division Leader can update a role to be a Unit Leader or Team Member. A Unit Leader may update and add a role to be a team member.

### Manage Users

1. Select the Division the User is assigned to.
2. Select the Unit the User is assigned to.
3. Select the User that will be moved and/or have their role changed.
4. Select the Division that the User will be added to.
5. Select the Unit that the User will be added to.
6. Select the Role that the user will serve.
7. Click ‘Assign’ to apply your changes to the user.

<table>
<thead>
<tr>
<th>Current Division</th>
<th>Family and Community Engagement</th>
</tr>
</thead>
<tbody>
<tr>
<td>Current Unit</td>
<td>Instruction and Curriculum</td>
</tr>
<tr>
<td>User</td>
<td>Dr. Unit Leader1</td>
</tr>
<tr>
<td>Division Assignment</td>
<td>Training &amp; Development</td>
</tr>
<tr>
<td>Unit Assignment</td>
<td>Employee Assistance</td>
</tr>
<tr>
<td>Role</td>
<td>Division Leader</td>
</tr>
</tbody>
</table>

[Reset filters] (blue button)  [Assign] (green button)
Reports

- Click on Report to view or print reports related to the State.

• Select the report you want to view or print.

<table>
<thead>
<tr>
<th>Reports</th>
<th>View Division and Unit progress on assigned Strategy Milestones.</th>
<th>View the Login and Passwords for all users.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Set the Direction</td>
<td>Displays the Vision, Mission, and Values.</td>
<td>Displays the State’s Goals, Strategies, and their Explanations.</td>
</tr>
<tr>
<td>State Goals and Strategies with Explanations</td>
<td>Displays Terms and Term Definitions.</td>
<td></td>
</tr>
<tr>
<td>Goal Detail</td>
<td>Operationalize the Direction</td>
<td>Displays all Goals, Strategies, and Milestones.</td>
</tr>
<tr>
<td>SPM Glossary</td>
<td>Development Milestone Report</td>
<td>Displays Milestones that have not been assigned.</td>
</tr>
<tr>
<td>Operationalize the Direction</td>
<td>Milestone Not Assigned</td>
<td>Displays Milestones that have been assigned but no Actions have been created.</td>
</tr>
<tr>
<td>Milestone Report</td>
<td>Milestones with no Action Created</td>
<td>An organized list of the Units, Staff, and Collaborators within a Division.</td>
</tr>
<tr>
<td>Design Actionable Work</td>
<td>Division Collaboration</td>
<td></td>
</tr>
<tr>
<td>Goal \ Strategy \ Milestone \ Action</td>
<td>Explore the framework between Goals, Strategies, Milestones, and Actions.</td>
<td></td>
</tr>
<tr>
<td>Full Report w/ Action Status and Notes</td>
<td>Displays each Action Plan’s status notes and resources.</td>
<td></td>
</tr>
<tr>
<td>Implement Performance and Innovation Cycle</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Monthly Status</td>
<td>A graphic depiction of the status of all actions related to each milestone in the strategic plan to date as reported each month by the responsible Unit leader.</td>
<td></td>
</tr>
<tr>
<td>Monthly Status by Division</td>
<td>A graphic depiction of the status of all actions related to each milestone assigned to each Division to date as reported each month by the responsible Unit leader.</td>
<td></td>
</tr>
<tr>
<td>Status Report - Divisions \ Units</td>
<td>Displays Progress by Divisions \ Units.</td>
<td></td>
</tr>
<tr>
<td>Status Report - Goals \ Strategies \ Milestones</td>
<td>Displays Progress by Goals \ Strategies \ Milestones.</td>
<td></td>
</tr>
<tr>
<td>Action Status Log</td>
<td>Displays the most recent Action Status for an Action.</td>
<td></td>
</tr>
<tr>
<td>Milestone End of Year</td>
<td>Displays Milestone progress for the end of the Milestone Year.</td>
<td></td>
</tr>
</tbody>
</table>

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DIVISION LEADER

Division Leaders can create and edit Units and Unit Leaders assign Units to Leaders, create and edit Unit Process Managers, and Manage Unit Collaboration. Division Leaders can also assign Milestones to Units and view Unit progress on assigned Strategy Milestones. A Division Leader has access to the Units and people in his to her Division only.

Managing a Division

- **Click on Manage My Division.** From here, you can to add or edit Units, add or edit Unit Leaders, add or edit Unit Members, add or edit Unit Process Managers, and add or edit Collaborators.

Manage My Division

- **Click on Manage Unit and then click on Add New Units** to add or edit Units.
• **Click Manage Unit Leaders** and then **Add New Unit Leaders** to add or edit Unit Leaders. Select the Unit from the drop-down list and click Add New Team Member.

![Add - Edit a Unit Leader](image)

- **Click on Manage Unit Teams** and then **Add New Team Member** to add and edit Team Members.

**Manage my Division**

![Add Update Team Members](image)

* Pick a Unit from the list to administer team members for that Unit.

- Instruction and Curriculum

<table>
<thead>
<tr>
<th>Member</th>
<th>Phone</th>
<th>Email</th>
<th>Position</th>
</tr>
</thead>
<tbody>
<tr>
<td>Mr. Unit Leader 2</td>
<td></td>
<td></td>
<td>Coordinator of Development</td>
</tr>
<tr>
<td>Mr. Gary Fritz</td>
<td></td>
<td></td>
<td>Education Consultant</td>
</tr>
</tbody>
</table>
• **Click Unit Process Manager** to add or remove a **Unit Process Manager** from a Unit. A Unit Process Manager can be a Unit Leader, Unit Member, or Collaborator from within the Division. A Unit Process Manager has the same access level as a Unit Leader.

```
Add a Unit Process Manager
A Unit Process Manager must be a member of this division.

1. Choose a Unit
2. Choose a Team Member
3. Save Process Manager.
```

**Add - Update a Unit Process Manager**

```
Unit - Educational Technology
Team Members - Lary Boenburg \ Educational Technology \ team member
Login - this is a new login
Password -
```

**Manage Unit Collaboration**

Division Leaders may assign users as Collaborators to any other Unit. A Unit Leader can mark a Collaborator the responsible person or supporting member of an action. Collaborators can become a Unit Process Manager if they are from the same Division as the Unit that they are assigned to.

• **Click on Manage Unit Collaboration.**
• Select a Unit Where the Collaborator will be added.
• Select the Division and Unit where the Collaborator comes from.
• Select the Team Member or Unit Leader you would like to add as a Collaborator. Hit **Save**

**Manage my Division**

```
Manage Units  Manage Unit Leaders  Manage Teams  Unit Process Manager  Manage Unit Collaboration
```

```
Add Unit Collaboration
1. Select a Unit where Collaboration will be added: - Select -
2. Select a Division where Collaboration will come from: - Select -
3. Select a Unit where Collaboration will come from: - Select -
4. Select a Team Member or Unit Leader as Collaborator: - Select -
5. Save  Cancel
```
**Milestone Development**

Division Leaders may create a Milestone under development and comment on other Milestone under development on the **Milestone Development** page.

- Select a **Milestone Year**
- Select a **Goal**
- Select a **Strategy**

**Milestone Development**

1. Select a Milestone Year only to view Milestones.
2. Select a Goal to view Strategies.
3. Select a Strategy to view Milestones by Strategy or add a new Milestone.

<table>
<thead>
<tr>
<th>Milestone Year</th>
<th>2019 - 2020</th>
</tr>
</thead>
<tbody>
<tr>
<td>Goals</td>
<td>1 - Each student will meet or exceed educational milestones along pathways to graduate prepared for college, can...</td>
</tr>
<tr>
<td>Strategies</td>
<td>1.2 - We believe when high quality learning standards are established with support for a student focused learning...</td>
</tr>
</tbody>
</table>

**Enter the required fields and update your Milestone**

- **Sort**
- **25**
  - This is the next sort order based on existing Milestones for this Strategy.

**Milestone (in Development)**

- Develop tools and resources to support LEAs in the successful implementation of student success plans.

**Milestone Explanation**

When finished, select **Save – Update this Milestone**

- This Milestone will now be under development and can be selected by all Admins and Division Leaders However, only the person who created the Milestone or any Admin will be able to edit the Milestone or Milestone Explanation.
- All Admins and Division Leaders are able to add comments to Milestones under Development.

After the Leadership team has decided upon the final edition of a Milestone under Development. Any Admin may Commit the Milestone under development into the active Production state.
Assigning Milestones
Division Leaders assign Milestones to Units. Divisions, Units, and Unit Leaders MUST be entered first before assigning Milestones.

- Click on Manage my Milestones.

- Select a Milestone Year
  Milestone Year - 2017-2018

- Select a goal.

Manage my Milestones

Milestone Year - 2017-2018

Goal

select
1. Every student will start strong with a foundation of knowledge, skill, attitude, and habit in grades preschool-3.

- Select a strategy.

Goal: 1. Every student will start strong with a foundation of knowledge, skill, attitude, and habit in grades preschool-3.

All Goals

Strategy

select
1. 1. Use data collection and reporting tools to support the use of growth measures, and educators use data to provide appropriate support, then students will meet or exceed expected individual growth annually.
• **Select the Milestone** to assign to the Unit.

```
Goal: 1 - Every student will start strong with a foundation of knowledge, skill, attitude, and habit in grades preschool-3.
```

• **Strategy:** 1.1 - Use data collection and reporting tools to support the use of growth measures, and educators use data to provide appropriate support. Then students will meet or exceed expected individual growth annually.

```
All Strategies
```

<table>
<thead>
<tr>
<th>Milestone</th>
<th>Unit</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.1.1</td>
<td></td>
</tr>
<tr>
<td>1.1.1.1 - Develop a comprehensive needs assessment including supports for implementation of a student-focused learning system. (2017 - 2018)</td>
<td></td>
</tr>
</tbody>
</table>

• **Click on the arrow in the Assign Unit field** to select the Unit responsible for this Milestone from the drop-down list.
• **Save Changes.**

```
Milestone: 1.1.1 - Develop a comprehensive needs assessment including supports for implementation of a student-focused learning system. (2017 - 2018)
```

- **Assign Unit:**

```
Save Changes
```

• To view or print a complete list of Milestones assigned to all Units within a Division, **click on Units and Milestones** from the Main Menu.

### Units and Milestones

<table>
<thead>
<tr>
<th>Milestone Year - 2017 - 2018</th>
</tr>
</thead>
</table>

<table>
<thead>
<tr>
<th>Milestone</th>
<th>Unit</th>
<th>Unit Leader</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.1.1.1 - Develop a comprehensive needs assessment including supports for implementation of a student-focused learning system. (2017 - 2018)</td>
<td>Educational Technology</td>
<td>Gary Swanson</td>
</tr>
</tbody>
</table>
Comments

The State Administrator and Division Leaders may write comments on the Action Plan Statuses recorded by Unit Leaders and Unit Process Managers. Only one comment can be provided on an Action Status. When the comment is saved an automated email will be sent to the Unit Leader responsible for the status. The Unit Leader can then write a reply, and it will be emailed the writer of the comment.

To write a Comment

- From the main menu, click on Comments
- Select the Division, Unit, and Action Plan to specify which set of Statuses you would like to see.
- Select the Action Plan Status that you would like to comment on.
- Hit Add Comment
- Write out your comment and then hit Save.
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- **Reassign**: Will change the first role selected to the new one indicated.
- The list of available roles is based on the user’s current access level. The State Administrator may update or add a role to make an account into a Division Leader, Unit Leader, or Team Member. A Division Leader can update a role to be a Unit Leader or Team Member. A Unit Leader may update and add a role to be a team member.

![Manage Users Form](image)

1. Select the Division the User is assigned to.
2. Select the Unit the User is assigned to.
3. Select the User that will be moved and/or have their role changed.
4. Select the Division that the User will be added to.
5. Select the Unit that the User will be added to.
6. Select the Role that the user will serve.
7. Click ‘Assign’ to apply your changes to the user.

- **Current Division**: Family and Community Engagement
- **Current Unit**: Instruction and Curriculum
- **User**: Dr. Unit Leader1
- **Division Assignment**: Training & Development
- **Unit Assignment**: Employee Assistance
- **Role**: Division Leader
Reports

- Click on Report to view or print reports related to the Division.

- Select the report you want to view or print.

## Reports

<table>
<thead>
<tr>
<th>Division</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Set the Direction</td>
<td>Displays the Vision, Mission, and Values.</td>
</tr>
<tr>
<td>Operationalize the Direction</td>
<td>Displays the State's Goals, Strategies, and their Explanations.</td>
</tr>
<tr>
<td>Reports</td>
<td>Displays Terms and Term Definitions.</td>
</tr>
<tr>
<td>Milestone Report</td>
<td>Displays all Goals, Strategies, and Milestones.</td>
</tr>
<tr>
<td>Development Milestone Report</td>
<td>Displays all Milestones plus Milestones under Development.</td>
</tr>
<tr>
<td>Milestone Not Assigned</td>
<td>Displays Milestones that have not been assigned.</td>
</tr>
<tr>
<td>Milestones with no Action Created</td>
<td>Displays Milestones that have been assigned but no Actions have been created.</td>
</tr>
<tr>
<td>Division Collaboration</td>
<td>An organized list of the Units, Staff, and Collaborators within a Division.</td>
</tr>
<tr>
<td>Goal</td>
<td>Goal \ Strategy \ Milestone \ Action</td>
</tr>
<tr>
<td>Full Report with Action Status and Notes</td>
<td>Displays each Action Plan's status notes and resources.</td>
</tr>
<tr>
<td>Monthly Status</td>
<td>A graphic depiction of the status of all actions related to each milestone in the strategic plan to date as reported each month by the responsible Unit leader.</td>
</tr>
<tr>
<td>Monthly Status by Division</td>
<td>A graphic depiction of the status of all actions related to each milestone assigned to each Division to date as reported each month by the responsible Unit leader.</td>
</tr>
<tr>
<td>Status Report - Divisions \ Units</td>
<td>Displays Progress by Divisions \ Units.</td>
</tr>
<tr>
<td>Action Status Log</td>
<td>Displays the most recent Action Status for an Action.</td>
</tr>
</tbody>
</table>
### Strategic Performance Management Status

#### Full State Report

**Goal:** 1 - Each student develops the social, emotional, and character competencies that promote learning and success in life.

**Strategy:** 1.1 - If KSDE develops, supports use of, and evaluates a social, emotional, and character competency framework, then districts will provide a comprehensive approach to SECD, and each student will develop the social, emotional, and character competencies that promote learning and success in life.

**Milestone:** 1.1.1 - Integrated comprehensive social, emotional and character competency framework has been developed and is in place. (2017 - 2018)

**Division:** Early Childhood, Special Education & Title Services  **Unit:** Social, Emotional, Character Development

**Action:** 1.1.1.1 - Gather and compile policy considerations for the assessment of social emotional learning at the district (local) level. Primary target audience is Kansas district administrators.

<table>
<thead>
<tr>
<th>Responsible:</th>
<th>Start: Sep</th>
<th>End: Sep</th>
</tr>
</thead>
</table>
UNIT LEADER

Unit Leaders can add and update members in the Unit, add and update Collaborators, create an Action Plan to accomplish the Milestone, provide updates on progress, and view Reports.

Managing a Unit

- **Click on Manage my Unit Team, click on Add New Team Member** to add or edit people assigned to the Unit.

Manage my Unit Team

![Manage my Unit Team form](image-url)
Unit Leaders may also add Collaborators to their Unit.

- Click on **Manage Unit Collaboration**

**Manage my Unit Team**

![Image of collaboration management interface]

- Select a Division where the Collaborator will come from
- Select your Unit
- Pick which person you would like to add to your Unit as a Collaborator
Creating an Action Plan
An Action Plan is created for each Milestone assigned to the Unit. If an action can be completed in less than a month, then the plan is too detailed. If an action takes an entire year to complete, then the plan is too broad.

- Click **Action Plans** from the Main Menu.
- **Select the goal** related to the Milestone.
- **Select the strategy** related to the Milestone.
- **Select the Milestone**.

### Action Plans

Select a Goal – Strategy – Milestone combination to add or update Actions or display all Actions.

**Goal:** 5 - All students will develop the knowledge, skills, and behaviors needed to lead their sovereign nations to a thriving future through self-determination.

**Strategy:** 5.1 - Identify resources and supports needed to implement effective educational programs. Then Tribes will have resources and supports to oversee and implement successful educational programs which contribute to the future of their sovereign nations, and all students will develop the knowledge, skills, and behaviors needed to lead their sovereign nations to a thriving future through self-determination.

<table>
<thead>
<tr>
<th>Milestone</th>
<th>Actions</th>
</tr>
</thead>
</table>
| 5.1.1 - Provide district support for schools to implement evidence-based practices for continuous improvement. (2019 - 2020) | }
Click Add a new Action.

- Add the **Action**, **Start** and **End dates** (month only), Resources/Budget and Outputs. These are used as an estimate of when the action should begin and be completed by.
- The **Start Order** will be the number associated with the Action.
- Record the Action’s **Budget**.
- Select the Resources that will be used for the Action. Administrators populate the list of available resources.
- Record the Action’s **Outputs**.
- **Click on the arrow** in the Responsible field to assign the Action to the person responsible for the Action. This can be the Unit Leader, a Unit Team Member, or a Collaborator.
- Select members of your Unit (including Collaborators) that will be involved in the action.
- Record any other Notes that may of be of interest.
- **Click on Save Action**
• Additional Actions can be added by clicking on Add a new Action.

To view or print a list of actions and the Personnel Responsible, click on Action Responsibility on the Main Menu.
Creating an Action Status

- From the main menu, click on Action Status to add or update monthly status and notes for an Action.

Menu

- Select the action that you would like to provide a status for.

- Click Add Status
• Select the month that you would like to report a status for.
  The Last day of field will populate with your choices of months.
  1. If the current month is not the start of your Milestone year, you may report for the previous month.
  2. If today's date is within the last 7 days of the month, then you may report for the current month.
  3. You may not add a status to a month prior to the added date of the action.
  4. Not Yet Start Date cannot be selected once the action’s start month has begun.

The Status is used to indicate the progress on the action.
The Notes field is where you will report on information regarding to the action.
Manage Users

Manage Users allows the State Administrators, Division Leaders, and Unit Leaders to move one user to a Division and Unit of their choice. A new role can either be added or the selected role can be changed. The role options vary based on the user’s current access level.

- The State Administrator may move people into the Division Leader, Unit Leader, or Team Member roles. A Division Leader can move people into a Unit Leader or Team Member role. A Unit Leader may move people into a team member role.
- If a user is added as the Division Leader or a Unit Leader, then the former Division Leader or Unit Leader will be unassigned.

Manage Users

1. Select the Division the User is assigned to.
2. Select the Unit the User is assigned to.
3. Select the User that will be moved and/or have their role changed.
4. Select the Division that the User will be added to.
5. Select the Unit that the User will be added to.
6. Select the Role that the user will serve.
7. Click ‘Assign’ to apply your changes to the user.
Reports

- From the main menu, **click on Reports** to view or print the action plan.
• Select the information that you would like to view.

**Full Report w/Action Status and Notes Report**

Use filters to customize reports. To create a report displaying the entire plan and current status, click the Reset button to set filters to "all". Select 'Create Report' to build your report. Select 'Reset' to clear all the filters.

- Select the Milestone Year you wish to view or "all" to include every Milestone Year in the report.
- Use filters below to customize reports by division and/or units. Only Divisions and Units that have been assigned milestones will be displayed in the dropdown lists.
  - Divisions: 
  - Units: 
- Use filters below to customize reports by goals, strategies, and/or milestones.
  - Goals: 
  - Strategies: 
  - Milestones: 

(Clicking on Create Report, use the ▼ to select a format and generate a paper copy. PDF is the best format to select.)

**Create Report**

**Reports can be Saved as a PDF, a Word Document, or in Excel**

**State Goals and Strategies with Explanations Report**

<table>
<thead>
<tr>
<th>GOAL</th>
<th>GOAL STATEMENT WITH EXPLANATION</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>All students will enter kindergarten academically, socially, and emotionally prepared to succeed in school.</td>
</tr>
</tbody>
</table>

When students enter kindergarten with pre-academic skills (e.g., having a large vocabulary, number sense) and social/emotional skills (e.g., being able to share, cooperate, listen) needed for learning, they have the confidence to engage, learn, and articulate their thoughts. Kindergarten readiness is not only about preparing students, but also supporting families and communities to engage in their child's education. This includes creating and sustaining early education settings that respect cultural and individual differences and collaborations with communities and partners to support families and early learning settings. Investing in early learning builds a strong future for students and their families.

<table>
<thead>
<tr>
<th>STRATEGY</th>
<th>STRATEGY STATEMENT</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>When the EBE partners with early childhood development organizations and tribes to increase access and supports for high-quality, early childhood education, these barriers to accessing high-quality, early childhood education will be addressed, and all students will enter kindergarten academically, socially, and emotionally prepared to succeed in school.</td>
</tr>
</tbody>
</table>

Research has shown that high quality early childhood learning experiences have short- and long-term impact on a child's cognitive and social development. Collaboration with early childhood partners, such as families, family child care providers, tribes, Head Start, Early Head Start, tribal colleges and universities, and public and private preschool programs have shown to impact the availability and quality of early childhood services and increase family and staff knowledge and skills on early learning. More children can have access to early learning experiences through strong partnerships focused on addressing the barriers to early childhood education. Partnerships can also improve the transition from preschool to kindergarten so the experience is positive for both children and families.