STRATEGIC PERFORMANCE MANAGEMENT ONLINE SYSTEM MANUAL

Academic Development Institute

121 NORTH KICKAPOO SREET

LINCOLN IL, 62656

Table of Contents

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 *ardl127*. 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.

Menu

Vision - Mission - Values	Enter your State's Vision, Mission, and Values.
Manage Goals	Create new Goals & Edit existing Goals. Add Goal Meaning, Goal Responsibility, Conflicts, and Gaps. Create Goal SWOT Analysis and Performance Measures.
Manage Strategies	Create new Strategies & Edit existing Strategies. Create Strategy Performance Measures that include indicators, data sources, baselines, and targets.
Manage Milestones	View Milestones and Develop New Milestones.
Manage my Divisions	Create / Edit Divisions and Division Leaders. Create / Edit Units and Unit Leaders.
Assign Milestones to Division	Assign Milestones to Divisions.
Milestones Assigned	View the Divisions and Units assigned to Milestones.
Manage Glossary Terms	Create, Customize, and View SPM Terms and Definitions.
Reports	View Division and Unit progress on assigned Strategy Milestones.
User Login and Password	View the Login and Passwords for all users.

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.

Vision - Mission - Values

State Vision:

State Mission:

State Values:

Save

Creating and Customizing Goals

- **Manage Goals**
- **Click Create a new Goal**

Manage Goals

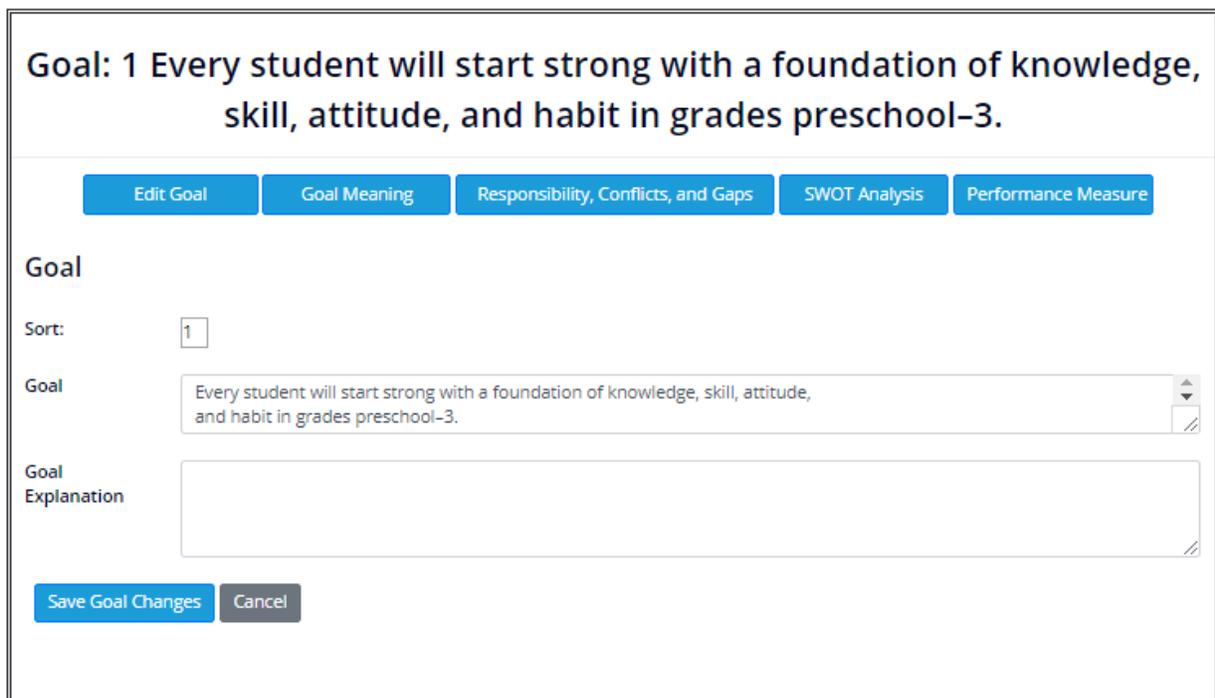1. Select a goal from the list below
2. Select a goal modifier

Create a new Goal

- **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.

| Edit Goal | Goal Meaning | Responsibility, Conflicts, and Gaps | SWOT Analysis | Performance Measure |

Goal

Sort: 1

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

Goal Explanation

Save Goal Changes   Cancel

Display Goal List

- **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.

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

| Edit Goal | Goal Meaning | Responsibility, Conflicts, and Gaps | SWOT Analysis | Performance Measure |

Goal Meaning

Goal Meaning for Students

Students will receive rigorous core instruction.

Students will need to know where they are in relation to their short and long term learning goals--their path to readiness whether college and/or career.

[Add Goal Meaning for Students]

Goal Meaning for Families

Parents will not rely on grades but instead understand what the child is able to do and apply to their learning.

Families will be able to make informed decisions on use of resources for interventions, support, and enrichment.

[Add Goal Meaning for Families]

Goal Meaning for Educators

Educators will need to understand how to interpret and use appropriate growth measures and other measures for their students, and how to reconcile multiple measures for planning instructions.

[Add Goal Meaning for Educators]

Goal Meaning for SEA Employees

[Add Goal Meaning for SEA Employees]

- 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.

| Edit Goal | Goal Meaning | Responsibility, Conflicts, and Gaps | SWOT Analysis | Performance Measure |

Goal Responsibility, Conflicts, and Gaps

State Role and Responsibility

Ensure accountability system incentives district/school actions toward goal.

Add State Role and Responsibility

District Role and Responsibility

Utilize growth data to make appropriate district improvement.

Add District Role and Responsibility

School Role and Responsibility

Utilize growth data to make appropriate school improvement and educator and leader support decisions.

Add School Role and Responsibility

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.

Save / Update Conflicts and Gaps

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

SWOT Analysis

Strength

Schools desire a growth measure	📝	✕

Add SWOT Strength

Weakness

Determining the best growth model	📝	✕

Add Swot Weakness

Opportunity

Communicate student's progress	📝	✕

Add SWOT Opportunity

Threat

Misccomunication	📝	✕

Add SWOT Threat

Save Performance Indicator

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

- **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**

- 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.

| Goals | All Strategies | Add Strategy |

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.

| Edit this Strategy | Strategies | Performance Measures |

Performance Measures | 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 | Close |

- Hit **Save Performance Indicator**

Milestone Development

- 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.

Milestone Year	2019 - 2020
Goals	5 - All students will develop the knowledge, skills, and behaviors needed to lead their sovereign nations to a thrivin
Strategies	5.1 - Identify resources and supports needed to implement effective educational programs, then Tribes will have r

Enter the required fields and update your Milestone

Close

Sort

2

This is the next sort order based on existing Milestones for this Strategy.

Milestone

Provide district support for schools to implement evidence-based practices for continuous improvement.

Milestone Explanation

☐ Approved

Save   Cancel

- 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.
- A Milestone must be marked as Approved by the Division leader or an Admin before it can be moved from the Development environment into the Production environment. After a Milestone is moved using the "Commit to Production" button, it cannot be brought back into development. An admin can however continue to edit it as needed.

Save - Update this Milestone   Cancel   Commit to Production

Managing Division

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

Manage my Division

| Manage Divisions | Manage Division Leaders | Manage Units | Manage Unit Leaders | Division Process Manager |

Add - edit Divisions

Add New 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 Divisions 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

| Manage Divisions | Manage Division Leaders | Manage Units | Manage Unit Leaders | Division Process Manager |

Add - edit Units

* Pick a Division from the list to administer the Units and Leaders for that Division.

Learning Services ▼

Add New Unit

- **Click the arrow** to select a Division from the drop-down list.
- **Click on Add New Unit**
- Add Unit information and **click Save – Update**

Add - Update a Unit

Unit Name:

Unit Description:

Unit Leader: ▼

Save - Update   Cancel   Delete

- **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

| Manage Divisions | Manage Division Leaders | Manage Units | Manage Unit Leaders | Division Process Manager |

Add - edit Unit Leaders

* Pick a Division from the list to administer the Units and Leaders for that Division.

Learning Services ▼

Add New Unit Leader

- **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

| Manage Divisions | Manage Division Leaders | Manage Units | Manage Unit Leaders | Division Process Manager |

Add a Division Process Manager

A Division Process Manager must be a member of this division.

1. Choose a Division
2. Choose either a Unit Leader* or a Division Team Member
3. Save Process Manager

1. **Choose Division** - Divisions -
2. **Choose a Unit Leader or Team Member *** - Unit Members -

Login -   Password -

Save Process Manager

- 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.]**

- Click on **Assign Milestones to Divisions** from the main menu.

Assign Milestones to Divisions

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

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

Assign Milestones to Divisions

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

- **Select a Strategy**

Assign Milestones to Divisions

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 a Milestone**

Milestone	Division	Unit	End Date
select	1.1.1 - Develop a comprehensive needs assessment including supports for implementation of a student-focused learning system. (2018)			

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

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

Assign Division: ▼

Assigned Unit:

Save Changes

- **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**

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 that you would like to change
- Hit **Save this Edit** to change the record or **cancel** to close out of your edit without saving.

Manage Glossary Terms

SPM Terms and Definitions Glossary

The glossary allows your agency to define the terms used in the course of your strategic planning. Enter terms and their corresponding definitions in the areas provided below. Use the Find button to review the terms and definitions already entered. Leaving the Search Term blank and using the Find button will return all the terms.

SPM Term

Monthly Collaborating Team Performance Review

Term Definition

A monthly meeting of the Collaborating Teams to review progress on the Action Plan and make adjustments as necessary to more expeditiously meet the milestone.

19 of 42 ◄ Scroll ►

Search Term

[Find] [All Terms]

[Edit this Term] [New Term]

[Remove this Term] [Cancel]

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 to 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.

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

Reset filters   **Assign**

Reports

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

Reports

Set the Direction

State Vision - Mission - Values	Displays the Vision, Mission, and Values.
State Goals and Strategies with Explanations	Displays the State's Goals, Strategies, and their Explanations.
Goal Detail	Displays Goal Meaning, Responsibility, Conflicts and Gaps, SWOT Analysis, and Performance Measures.
Strategy Performance Measures	Displays Strategy Performance Measures.
SPM Glossary	Displays Terms and Term Definitions.

Operationalize the Direction

Milestone Report	Displays all Goals, Strategies, and Milestones.
Development Milestone Report	Displays all Milestones plus Milestones under Development.
Milestone Not Assigned	Displays Milestones that have not been assigned.
Milestones with no Action Created	Displays Milestones that have been assigned but no Actions have been created.
Division Collaboration	An organized list of the Units, Staff, and Collaborators within a Division.

Design Actionable Work

Goal \ Strategy \ Milestone \ Action	Explore the framework between Goals, Strategies, Milestones, and Actions.
Full Report w/ Action Status and Notes	Displays each Action Plan's status notes and resources.

Implement Performance and Innovation Cycle

Monthly Status	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.
Monthly Status by Division	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.
Status Report - Divisions \ Units	Displays Progress by Divisions \ Units.
Status Report - Goals \ Strategies \ Milestones	Displays Progress by Goals \ Strategies \ Milestones.
Action Status Log	Displays the most recent Action Status for an Action.
Milestone End of Year	Displays Milestone progress for the end of the Milestone Year.
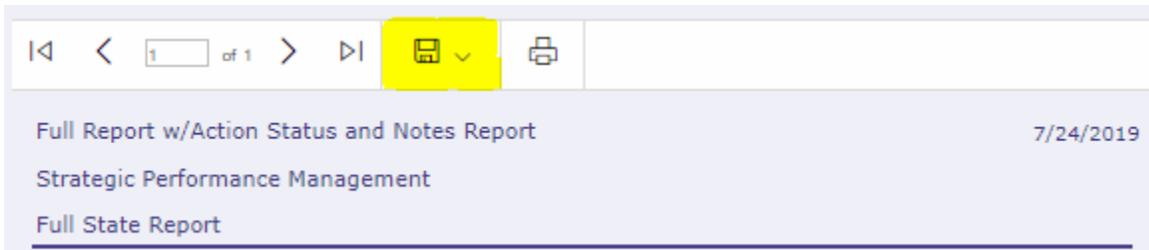
- **Select the report** you want to view or print.

DIVISION LEADER

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

Manage my Division	Create / Edit Units, Unit Leaders, Team Members, and Unit Process Managers. Assign Collaborators to your Units.
Milestone Development	Propose and Develop New Milestones or Milestone Changes.
Manage my Milestones	Assign Milestones to Units.
Units and Milestones	Milestones assigned to Units.
Reports	View Division and Unit progress on assigned Strategy Milestones.

Managing a Division

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

Manage My Division

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

- **Click on Manage Unit and then click on Add New Units** to add or edit Units.

Add - Edit a Unit

Add - Update a Unit

Unit Name:

Unit Description:

Unit Leader: - select - ▼

Save - Update   Cancel   Delete

- **Click Manage Unit Leaders** to add or edit Unit Leaders. The **Add Unit Leader** button will pull up several fields that are used to create a new Unit Leader and assign him or her to a Unit. After selecting a Unit, click on Save to finish adding the Unit Leader.

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

- **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.

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**

Milestone Development

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

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

- 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.
- A Milestone must be marked as Approved by the Division leader or an Admin before it can be moved from the Development environment into the Production environment. After a Milestone is moved using the "Commit to Production" button, it cannot be brought back into development. An admin can however continue to edit it as needed.

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.**

Manage my Division	Create / Edit Units, Unit Leaders, Team Members, and Unit Process Managers. Assign Collaborators to your Units.
Milestone Development	Propose and Develop New Milestones or Milestone Changes.
Manage my Milestones	Assign Milestones to Units.
Units and Milestones	Milestones assigned to Units.
Reports	View Division and Unit progress on assigned Strategy 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.
>
> **All Goals**

> **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**

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

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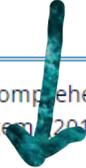
- To view or print a complete list of Milestones assigned to all Units within a Division, **click on Units and Milestones** from the Main Menu.

Milestone Progress

The Milestone Progress page allows a division leader to provide an explanation on the whether the Milestone was or was not Met. The upper grid will show the most recent status recorded for an Action. The lower grid is impacted by the selected Milestone Year. If the current Milestone Year is selected, then the lower grid will show the status information related to the previous month. If a past milestone year is selected, then the lower grid will show the status information for the last month of the Milestone year.

- **Edit the Milestone** to select it.
- **Click on the Is Met** to select either Yes or No.
- **Provide a Progress Explanation** in the text grid.

Milestone End of Year Progress

Milestone Year - [2018 - 2019 ⇕]

Goal:	7 - Each student develops the social, emotional, and character competencies that promote learning and success in life.
Strategy:	7.1 - Enhance outlook to support the use of, and evaluates a social, emotional, and character competency framework, then districts will provide a comprehensive approach to SEG, and each student will develop the social, emotional, and character competencies that promote learning and success in life.
Milestone:	7.1.1 - Alignment and integration of social/emotional growth learning processes with district initiatives and priorities including curriculum, instruction and assessment has been promoted and disseminated.
Assigned Unit:	SEL Unit
Division Name:	SEL Division

Action:

Action	Status	Month
7.1.1.1 - Coordinate milestone implementation with and across each board outcome and strive for coherent policies, consistent messaging, increased efficiency, and effective teamwork.	Completed	Jun
7.1.1.2 - Promote availability of and increase use of existing high quality evidence-based resources with policy makers, district staff, family, businesses, and community members.	Completed	Jun
7.1.1.3 - A continuum of differentiated high quality professional learning resources that creates and sustains safe, equitable, and culturally relevant learning environments can be readily accessed by each district.	Behind Schedule	May

Month	Actions	No Status	Not Yet Start Date	Behind Schedule	On Time	Completed
Jun	3	1 - 33.33%	0 - 0.00%	0 - 0.00%	0 - 0.00%	2 - 66.67%

Is Met: [Not Selected ⇕]

Progress Explanation:

[   ]

[Save] [Cancel]

Units and Milestones

Milestone Year - [2017 - 2018 ▾]

Milestone	Unit	Unit Leader
1.1.1 - Develop a comprehensive needs assessment including supports for implementation of a student-focused learning system. (2017 - 2018)	Educational Technology	Gary Swanson

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 to 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.
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- 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.

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

Reset filters   Assign

Reports

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

Manage my Division	Create / Edit Units, Unit Leaders, Team Members, and Unit Process Managers. Assign Collaborators to your Units.
Milestone Development	Propose and Develop New Milestones or Milestone Changes.
Manage my Milestones	Assign Milestones to Units.
Units and Milestones	Milestones assigned to Units.
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- **Select the report** you want to view or print.

Reports

Set the Direction

State Vision - Mission - Values	Displays the Vision, Mission, and Values.
State Goals and Strategies with Explanations	Displays the State's Goals, Strategies, and their Explanations.
Goal Detail	Displays Goal Meaning, Responsibility, Conflicts and Gaps, SWOT Analysis, and Performance Measures.
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Operationalize the Direction

Milestone Report	Displays all Goals, Strategies, and Milestones.
Development Milestone Report	Displays all Milestones plus Milestones under Development.
Milestone Not Assigned	Displays Milestones that have not been assigned.
Milestones with no Action Created	Displays Milestones that have been assigned but no Actions have been created.
Division Collaboration	An organized list of the Units, Staff, and Collaborators within a Division.

Design Actionable Work

Goal \ Strategy \ Milestone \ Action	Explore the framework between Goals, Strategies, Milestones, and Actions.
Full Report w/ Action Status and Notes	Displays each Action Plan's status notes and resources.

Implement Performance and Innovation Cycle

Monthly Status	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.
Monthly Status by Division	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.
Status Report - Divisions \ Units	Displays Progress by Divisions \ Units.
Status Report - Goals \ Strategies \ Milestones	Displays Progress by Goals \ Strategies \ Milestones.
Action Status Log	Displays the most recent Action Status for an Action.
Milestone Progress Summary	Displays Milestone progress for the end of the Milestone Year.
Milestone Progress Data	Displays Milestone progress for the latest reporting period.

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.

Responsible: Start: *Sep*   End: *Sep*

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.

Unit Leaders may also add Collaborators to their Unit.

- Click on **Manage Unit Collaboration**

Manage my Unit Team

- 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

Milestone Year [2019 - 2020 ⇕]

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. + show goals

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. + show strategies

	Milestone	Actions
Select	*5.1.1 - Provide district support for schools to implement evidence-based practices for continuous improvement. (2019 - 2020)*	0

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.

Developing new Milestones

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

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

Creating an Action Status

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

- 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.
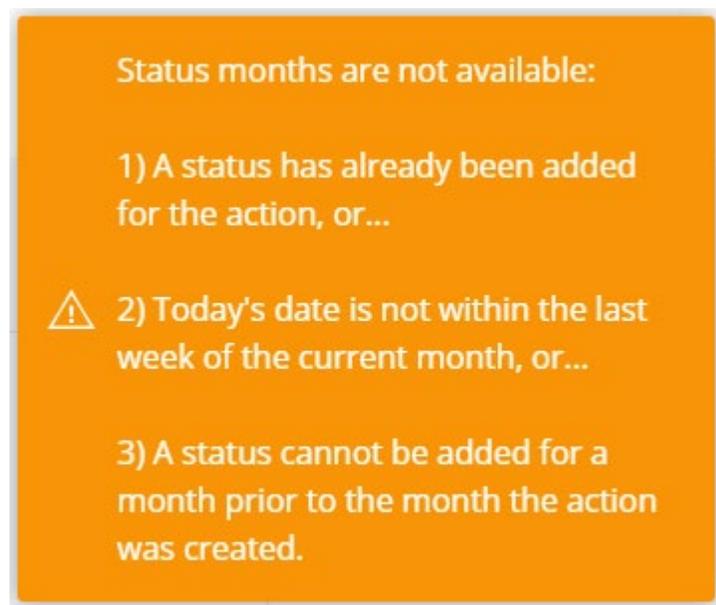
The Status is used to indicate the progress on the Action.
The Notes field is where you will report on information regarding to the Action.
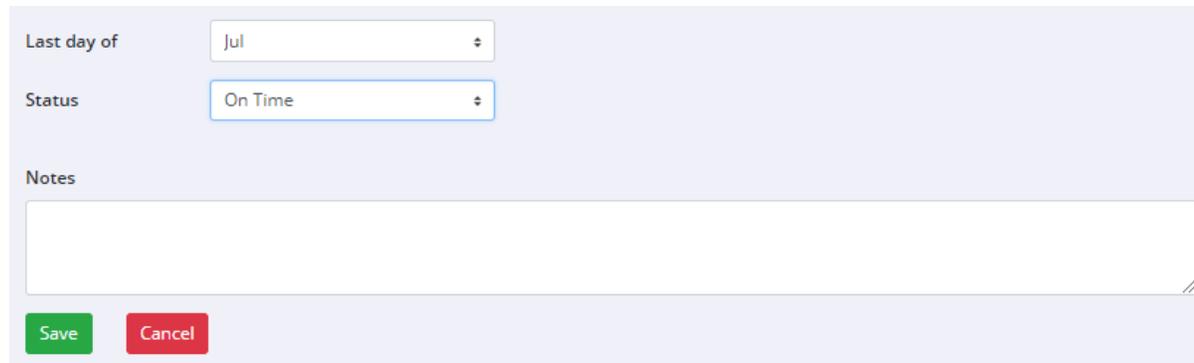
Last day of	Jul ▲▼
Status	On Time ▲▼
Notes	

Save Cancel

- The "orange status notification" will appear to explain a few of the Action status rules. It is commonly seen after adding a new action status. The action status rules include the following.
    1. Only one status can be added for the previous month.
    2. A status can be added to the current month during the months final 7 days.
    3. Statuses are not to be added to a month prior to when the action was added.

Status months are not available:

1) A status has already been added for the action, or…

⚠ 2) Today's date is not within the last week of the current month, or…

3) A status cannot be added for a month prior to the month the action was created.

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.

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

Reset filters   Assign

Reports

- From the main menu, **click on Reports** to view or print the Action Plan

- Select the report to view or print.

- 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.
Year: all

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 list.
Divisions: all

Units: all

Use filters below to customize reports by goals, strategies, and/or milestones.
Goals: all

Strategies: all

Milestones: all

Reset
(Reset returns all filters to "all".)

Create Report   (After 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

STATE GOALS AND STRATEGIES WITH EXPLANATIONS

GOAL	GOAL STATEMENT WITH EXPLANATION
1	All students will enter kindergarten academically, socially, and emotionally prepared to succeed in school.
	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 supporting early learning settings that respect cultural and individual differences and collaborating with communities and partners to support families and early learning settings. Investing in early learning builds a strong future for students and their families.

STRATEGY	STRATEGY STATEMENT
1	When the BIE partners with early childhood development organizations and Tribes to increase access and supports for high-quality, early childhood education, then 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.
	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 pre-school 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.