Administrator-level Strategic Reporting

Tracdat for the VP or College Dean

Login to <u>http://lssu.tracdat.com</u>, until you change it your username and password are BOTH your LSSU ID

Reporting Units are in place for each cabinet-level unit on the Org-Chart (shown in yellow), and for each Dean (Colleges shown in orange). **Reporting units** define the Seven Key Strategies of the Strategic Plan as



implemented by this unit, and an Annual Report category to document more general items.



Navigate to your "Administrative Reporting Unit" by selecting the white dropdown menu, then select "Strategic Planning" on the second line, and select "Strategic Outcomes" on the third line. The screen should look something like this:

4	\geqslant	<pre>tracdat. se</pre>	lected Unit: Administrative Reporting Unit - (VPAA) Provost	-	dmyton	🗐 [<u>log ou</u>
		Home Strateg	ic Planning Strategic Report Summaries Data Tools Reports Docum	ents		
_			General Strategic Outcomes Personnel			
	Ad	ministrative Reporting Unit - (VI	PAA) Provost > Strategic Planning > Strategic Outcomes			
		Туре	Strategic Outcome	Activ	e?	
۲	۲	Strategy 1 LSSU Community	 Collaborative, Committed Campus Community - LSSU will develop a permanent and permeating culture of sharing ideas, knowledge, resources, and talent across campus fostering a sense of pride and community. 	Y	<u>edit</u>	<u>delete</u>
۲	۲	Strategy 2 School of Choice	Desirable School of Choice (recruiting/academic reputation) LSSU will attract an increasing number of students who are academically prepared and reflective of society's diversity.	Y	edit	<u>delete</u>
۲	۲	Strategy 3 Campus Experience	3. Student Campus Experience (retention/campus life) LSSU will provide students with a supportive, connected, and comfortable campus experience to enhance student development.	Y	edit	<u>delete</u>
۲	۲	Strategy 4 Student Learning	 Student Learning and Development - LSSU will maintain and develop excellent programs for students which provide experiential learning activities that take advantage of this unique region. 	Y	edit	<u>delete</u>
۲	۲	Strategy 5 Region	Regional Communities - LSSU will collaboratively contribute to economic growth and improved quality of life in our region.	Y	edit	<u>delete</u>
۲	۲	Strategy 6 Support	6. Educational Support - LSSU will establish and maintain an appropriate level of educational resources to effectively support learning.	Y	edit	<u>delete</u>
۲	۲	Strategy 7 Stewardship	 Stewardship and Sustainability - LSSU will promote efficient and effective utilization of resources to lay the foundation for growth and sustainability. 	Y	edit	<u>delete</u>
۲	۲	Annual Reports	Summary annual reports provide overview of general activities, initiatives, and contribution to University Mission.	Y	edit	<u>delete</u>
			Add New Strategic Outcome			

Your Subsidiary Units will link their activities to the items listed here in the Reporting Unit. You will generate a report based on those activities, and then enter a summary for each key strategy. MORE ON THAT IN A MOMENT, but now let's look at the **view from a Subsidiary Unit**.

Each Subsidiary Unit will have **their own** "Administrative Unit Outcomes". Those that are tied to the Strategic Plan should have the Key Strategy numbering included in the description. An "Annual Report" outcome has been included for other general activities. The "Administrative Unit Outcomes" are **LINKED** to your "Administrative Reporting Unit" on the tab "Link to Strategic Outcomes"

Selected Unit: Administrative Unit (VPAA) - Ass	sociate Provost 👻	dmyton 💿 [<u>log out</u>]
Home Administrative Unit Unit's Assessment Plan Asses	ssment Findings Reports Documents	
Administrative Unit Outcomes Activities/Measures	Link to Strategic Outcomes	
Administrative Unit (VPAA) - Associate Provost > Unit's Assessment Plan > Administrative	e it Outcomes	1 State 1 Stat
Administrative Unit Outcome Name Administrative Unit Outcome	Outcome Status	
 Assessment activities 4.4 The Associate Provost's office supports institutional qual leadership to the university through assessment activities, p 	lity initiatives providing Active projects, training and oversight.	edit copy delete
• Future Faculty Fund 4.4 The Associate Provost, working in conjunction with the H supports faculty/staff professional development aligned with oversight of the King Chavez Parks Future Faculty Fund.	KCP Selection Committee, Active a the university mission through	<u>edit copy delete</u>
⊙ ⊚ Annual Unit Report Annual report on activities, initiatives and overall contribution	on to the university mission. Active	edit copy delete
Add New Administrative Unit Outc	come	

When the Subsidiary Unit connects their unit outcome to your Key Seven, they select the "Link to Strategic Outcomes" tab, select the specific outcome from the drop menu, and CHECK the Strategy from your list of strategies contained in the "Administrative Reporting Unit" (see red arrow below)

tracdat.	Selected Unit: Admir	nistrative Unit (VPAA) - Associate Provost 🔹	
Hom	Administrative Unit Unit	s Assessment Plan Assessment Findines Reports Documents es Activities/Measures Link to Strategic Outcomes	
Administrative Unit (VPAA) - A	ssociate Provost > Unit's Assess	ment Plan > Link to Strategic Outcomes	
Ad U Ad Uni	ministrative Name: Ministrative Ministrative t Outcome: Assessment activ Assessment activ A	rities Provost's office supports institutional quality initiatives hip to the university through assessment activities, projects, sight.	
Lake Superior State University			
	Туре	Institutional Core Value	
	Administrative Reporting Un	it - (VPAA) Provost	
_	Туре	Strategic Outcome	
	Strategy 1 LSSU Community	 Collaborative, Committed Campus Community - LSSU will develop a permanent and permeating culture of sharing ideas, knowledge, resources, and talent across campus fostering a sense of pride and community. 	
	Strategy 2 School of Choice	 Desirable School of Choice (recruiting/academic reputation) LSSU will attract an increasing number of students who are academically prepared and reflective of society's diversity. 	
	Strategy 3 Campus Experience	 Student Campus Experience (retention/campus life) LSSU will provide students with a supportive, connected, and comfortable campus experience to enhance student development. 	
V	Strategy 4 Student Learning	 Student Learning and Development - LSSU will maintain and develop excellent programs for students which provide experiential learning activities that take advantage of this unique region. 	
	Strategy 5 Region	 Regional Communities - LSSU will collaboratively contribute to economic growth and improved quality of life in our region. 	
	Save Changes D	iscard Changes Return To Administrative Unit Outcome	

How Subsidiary Units enter their activities and findings is covered in **"Subsidiary Unit Strategic Reporting"**. We will next see how to **generate a report** from your units.

trac	dat. Selected Unit: Administrative Reporting Unit - (VPAA) Provost	🗐 [<u>log out]</u>
	Home Strategic Planning Strategic Report Summaries Data Tools Reports Documents	
	Strategic Planning Assessment Unit Course Ad Hoc	
Administrative R	leporting Unit - (VPAA) Provost > Reports > Strategic Planning	\$?
Report	Description	
Report Assessment Impact by Goals	Description This report displays each of the selected unit's goals along with the assessment unit's plan and results that support the goals. This report is useful for showing alignment between the goals and assessment units plan and assessment results.	run
Report Assessment Impact by Goals Assessment Report	Description This report displays each of the selected unit's goals along with the assessment unit's plan and results that support the goals. This report is useful for showing alignment between the goals and assessment units plan and assessment results. This report shows how each assessment unit is supporting the goals of the institution, a reporting unit or an assessment unit. This report is presented in a five column model.	run run

Return to your "Administrative Reporting Unit" and select the "Reports" tab from the second line. Reports can be run from several levels – select the "Strategic Planning" level and run the "**Assessment Report**". For this example we will narrow the report to just "Strategy 4 Student Learning", and collect data from "<All>" of the Subsidiary Units. Don't select any other filters, and click "Open Report".

Set Parameters Preview Report	
Format:	PDF (suggested for Print) -
Layout:	Portrait 🗸
Report Title:	Assessment Report
	Annual Reports Strategy 1 LSSU Community Strategy 2 School of Choice
Types:	Strategy 3 Campus Experience Strategy 4 Student Learning
	Strategy 6 Support Strategy 7 Stewardship
Hide Inactive Stra <mark>tegic Outcomes:</mark>	
Select Unit:	* < All >
Outcome Status:	Active Inactive
Outcome Types:	1.1 Shared Governance 1.2 Internal Communications 1.3 Collaborations 1.4 Member Commitment 1.5 Innovation

The report this produces becomes the basis for the VP/Dean level overview summary. The Yellow box in the next figure indicates the narrative submitted by the **Subsidiary Unit** to describe the findings or activities related to this unit-level outcome. In this case there was no action identified as a result of the findings – this may or may not be necessary. The "??" shows where that action plan would appear. Depending on the specific outcome and finding. Supporting documents (red arrows) provides resource files containing the evidence or documents submitted in support of the claim.

Assessment Report

Lake Superior State University Administrative Reporting Unit - (VPAA) Provost

Strategic Outcome	Unit-level Outcomes	Means of Assessment, Responsibility & Criterion/Targets/Thresholds / Tasks	Strategic Report Summaries	Action to be Taken, Resc Status & Follow-Up
Strategy 4 Student Learning - 4. Student Learning and Development - LSSU will maintain and develop excellent programs for students which provide experiential learning activities that take advantage of this unique region.	Administrative Unit (VPAA) - Associate Provost - Assessment activities - 4.4 The Associate Provosts once supports institutionar quality initiatives providing leadership to the university through assessment activities, projects, training and oversight.	Assessment Method: The Associate Provost, through the SG Assessment Committee, will develop, disseminate and facilitate implementation of a University Assessment Plan (UAP) in the areas of academic assessment and operational support assessment. Assessment Category: Strategic - Report or Audit Criterion/Target/Threshold: Publication in advance of the February 2013 HLC Monitoring Report, and maintained/updated thereafter	06/10/2013 - Published Final Report from the Digital Photo-Assessment Project and cross-walk alignment to the Strategic Plan. This project surveyed 10% of all students, faculty and staff to identify good/bad areas of the university. Each contribution is aligned to the Critical Outcomes of the University Strategic Plan Strategic Status Indicator: Yes Reporting Year: 2012-2013 Related Documents: Digital Photo Assessment Project Spring 2013.pdf Digital Photo Project - Critical Outcome list.pdf	??

Using the Assessment Report for each Key Strategy compiled across "<All>" units the VP or Dean then synthesizes the activities in an **Executive Summary** using the tab: "Strategic Report Summaries. Select "Add Strategic Report Summary" then select the Key Strategy on which you wish to work.

🚸 tracdat.	Selected Unit: Administrative Reporting Unit - (VPAA) Provost	🔒 dmyton 🛛 🗐 [<u>log out</u>]
Home	Strategic Planning Strategic Report Summaries Data Tools Reports Documents	
By	y Strategic Outcome	
Administrative Reporting Unit - (VP	AA) Provost > Strategic Report Summaries	🐨 🗗
1. Collaborative, Committed Campus talent across campus fostering a ser	s Community - LSSU will develop a permanent and permeating culture of sharing ideas, kn nse of pride and community.	owledge, resources, and
Show Strategic Report Summaries		
	Add Strategic Report Summary	

🚸 tracdat. Selected Unit: Administrative Reporting Unit - (VPAA) Provost -🔒 dmyton 🛛 🔄 [<u>log out</u>] Home Strategic Planning Strategic Report Summaries Data Tools Reports Documents By Strategic Outcome Administrative Reporting Unit - (VPAA) Provost > Strategic Report Summaries > By Strategic Outcome > Select Strategic Outcome Strategic Outcome Туре Strategy 1 LSSU Community 1. Collaborative, Committed Campus Community - LSSU will develop a permanent and permeating culture of select sharing ideas, knowledge, resources, and talent across campus fostering a sense of pride and community. Strategy 2 School of Choice 2. Desirable School of Choice (recruiting/academic reputation) LSSU will attract an increasing number of select students who are academically prepared and reflective of society's diversity. Strategy 3 Campus Experience 3. Student Campus Experience (retention/campus life) LSSU will provide students with a supportive, connected, select and comfortable campus experience to enhance student development. Strategy 4 Student Learning 4. Student Learning and Development - LSSU will maintain and develop excellent programs for students which select provide experiential learning activities that take advantage of this unique region. Strategy 5 Region 5. Regional Communities - LSSU will collaboratively contribute to economic growth and improved quality of life in select our region. Strategy 6 Support 6. Educational Support - LSSU will establish and maintain an appropriate level of educational resources to select effectively support learning. 7. Stewardship and Sustainability - LSSU will promote efficient and effective utilization of resources to lay the Strategy 7 Stewardship select Select Strategic Outcome Annual Reports select Would you like to view/select Related Strategic Report Summaries prior to entering the Strategic Report Summary? yes no Return

Now the cool part, when you get this dialog-box – select "YES"

You will now be on a page which summarizes all the activities of your Subsidiary Units with checkboxes where you can hand-select key activities you want to highlight in your **Executive Summary**

Selected Unit: Administrative Reporting Unit - (VPAA) Provost -	[] [log out]
Home Strategic Planning Strategic Report Summaries Data Tools Reports Documents By Strategic Outcome	
Administrative Reporting Unit - (VPAA) Strategic Report Provost Summaries By Strategic Outcome Summaries	1
Filter By Date Show Strategic Report Summaries from 8/12/2012 To 8/12/2013 Go Hide All Show All According to Browset	E
Administrative one (TAX) - Assessment Unit Unit-level Outcomes 4.4 The Associate Provost's office supports institutional quality initiatives providing leadership to the university through assessment activities, projects, training and oversight. Strategic Report Summaries	
06/10/2013 - Published Final Report from the Digital Photo-Assessment Project and cross-walk alignment to the Strategic Plan. This project surveyed 10% of all students, faculty and staff to identify good/bad areas of the university. Each contribution is aligned to the Critical Outco of the University Strategic Plan	t omes
06/04/2013 - Training and on-campus sessions with Tracdat representative were held during spring 2013. A report on assessment activities linked to strategic plan priorities was distributed to Cabinet in June 2013, limited progress toward recording outcomes and actions linked to <u>View Action Plan</u>	s o plan.
U6/03/2013 - Spring 2013 assessment reports provided progress and implementation data on program-level activities. Across the five colle Eless than 50% of programs had entered programs with student learning outcomes defined in Tracdat, the vast majority which had defined Save Save & Continue Cancel	ges,

After you click "Save & Continue" you will be advanced to the page where you enter the Executive Summary of activities related to your selected Key Strategic outcome. Two Dropdown boxes are used to indicate the year of this summary report, and the "Strategic Status Indicator" is used to evaluate progress in this Strategic area.



When you select the "Action Plan" tab at the bottom, and click "add Action to be Taken, Resources, Status" you will advance to a page where you can define the next steps your unit will be taking in this area. Selecting the tab "Related Documents" advances to a page where you can append any type of supporting documentation or reports (you may want to append the "Assessment Report" you generated earlier for this strategic area). You can revisit the selection(s) you made of the highlighted Subsidiary Unit activities under the tab "Related Strategic Report Summaries". Save Changes when done.