ONLINE STRATEGIC PLANNING TOOL USER'S MANUAL

THIRD EDITION

Florida Center for Students with Unique Abilities
UCF | UNIVERSITY OF CENTRAL FLORIDA

Postsecondary Education

2

Through this guide you will find Tips' boxes. These boxes provide you with suggestions to support usability

Online Strategic Planning Tool User's Manual:

Postsecondary Education Component

Contents

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Planning Inclusive Postsecondary Education Programs with This Online Strategic Planning Tool

This site provides a web-based system that assists state, local, and higher education teams to review, plan, implement, and evaluate their strategies to increase capacity and develop, implement, and evaluate programs to deliver evidence-based and promising inclusive postsecondary education and services. The *Taxonomy for Postsecondary Comprehensive Transition Programs (TPCTP) (Kohler e.t al., 2023)* is the foundation and framework for the online Strategic Planning Tool: Postsecondary Education. The TPCTP incorporates evidence-based and promising practices synthesized across four domains: a) student-focused, b) faculty and staff-focused, c) program and institution-focused, and d) concept and systems development. Subsequently, the institution-level planning process utilizes a capacity-building model that includes a focus on four strategic areas: **data-based decision-making, capacity building, resource mapping and development, and partnership development.** The content and domains were established using the references below:

Dukes, L. L., III, Madaus, J. W., Faggella-Luby, M., Lombardi, A., & Gelbar, N. (2017). PASSing college: A taxonomy for students with disabilities in postsecondary education. Journal of Postsecondary Education and Disability, 30(2), 111-122.

Grigal, M., Hart, D., & Weir, C. (2012). Think College standards, quality indicators, and benchmarks for inclusive higher education. Boston, MA: University of Massachusetts Boston, Institute for Community Inclusion.

Kohler, P. D., Gothberg, J. E., Sterenberg, A. L., Andrews,D. A., & Seabrooks-Blackmore, J.J. (2023). A nominal group technique study identifying evidence-based and promising practices: Taxonomy for Postsecondary Comprehensive Transition Programs. Journal of Inclusive Postsecondary Education 4(2).

Kohler, P. D., Gothberg, J. E., Fowler, C. H., & Coyle, J. (2016). Taxonomy for transition programming 2.0: A model for planning, organizing, and evaluating transition education, services, and programs. Western Michigan University. Available at www.transitionTA.org.

W. K. Kellogg Foundation. (October 2000). Logic Model Development Guide. Battle Creek, MI: Author (www.wkkf.org).

A brief summary of each domain is included below:

Student-focused: This domain examines experiences and perceptions of students with disabilities in higher education. Planning in this domain includes benchmarks that address person-centered planning; self-determination skills; paid work experiences; financial aid support; and students' rights and responsibilities.

Faculty and Staff-focused: This domain examines faculty and staff's knowledge, attitudes, and beliefs to enhance access to higher education for students with disabilities. For students with ID to have successful and inclusive postsecondary experiences, faculty, and staff must be prepared. Planning in this domain includes benchmarks that address professional development, all learners having access and support, and faculty and staff engaged and supporting programs.

Program and Institution-focused: This domain examines the provision of services by the institution's disability support personnel and includes institutional policies and procedures that pertain to college students with disabilities. Planning in this domain includes benchmarks focusing on student recruitment and enrollment; credentials and competitive employment; materials and resources; and program evaluation.

Concept and Systems Development: This domain examines the development, evaluation, or validation of key attributes which the institution values. Planning in this domain includes benchmarks that focus on the alignment of the institution of higher education (IHE) and inclusive postsecondary education programs in relation to how the IHE's mission aligns with the inclusive program, commitment to diversity; accommodations, modifications, and supports; standards of practice; evaluation of metrics; and engagement with the community.

This postsecondary education program planning component is designed for all higher education institutions: Universities, state colleges, and technical colleges. Whether you are planning an inclusive postsecondary education program that serves students with intellectual disabilities or just seeking to improve your services, this planning system is designed with a framework through which you use data to reflect on current practice and outcomes, identify your strengths and needs, and subsequently develop a plan to address your needs and evaluate associated outcomes.

The following features and functions will guide you and your team through the planning process:

Dashboard: The Dashboard is your "home base" in transitionprogramtool.org. This page provides an up-to-date summary of where you are in the assessment and planning process. The Dashboard is also a place to upload data files and add links to external sites for use in identifying your strengths and needs, access resources, and serve as a place from where you can download copies of your plans, reports, and underlying data.

Overview: The overview provides information regarding the purpose and features of the web-based system.

Assessment and Planning: This component of the system provides three steps that lead you through the following: (1) forming your team, (2) assessing your implementation status and effectiveness, (3) making a plan, including evaluation elements.

Reporting: At different times of the year, access this section to create progress and end-of-the-year reports through which you summarize your implementation progress and achievement of your goals and outcomes.

Tools: This section is available to team leaders and system administrators. It allows users to run reports on the assessments, pull information from the database and compile it in Excel or PDF files.

This strategic planning process is team-driven. A team of relevant stakeholders, including higher education faculty and staff, local community agencies, related-service providers, and students and their families, is essential for gathering and reviewing current practices and outcomes; and subsequently for using this information to establish goals and related activities.

In addition to working with a team, keeping your focus on results is essential. This tool is designed to be used through a continuous improvement process that includes data collection and review, planning, evaluation, and assessment of goal attainment that addresses students' post-school outcomes.

Technical Recommendations

Because the FCSUA Strategic Planning Tool for Postsecondary Comprehensive Transition Programs is a web-based application, users must select a browser that best works with the system.

We suggest avoiding Internet Explorer and Microsoft Edge for those using Microsoft Windows. Google Chrome, Mozilla Firefox, and Opera are safe options, and Safari suits Mac users.

The system is also designed to work on a desktop or a laptop – **not a tablet or smartphone**.

Only one individual will add or edit information in the system to avoid overwriting others. Roles with editing privileges and assessment lock are discussed later in this guide.

Accessing the Tool

The FCSUA Strategic Planning Tool covers two focus areas, Transition, and Postsecondary Education.

New Users: Login

A planning site must be established for an institution of higher education (IHE) to use the system. To request a site, contact fcsuasupport@ucf.edu and provide the team leader's name and email address, who will be the primary contact. Once we establish the site, the team leader can log in.

To log in for the first time:

1. Select the planning focus

Figure 1

Planning focus selection view

2. Enter your email address, and when logging in the first time, use the same email address as the password. This applies to every new user, regardless of their role.

Figure 2

To login, the first time, use your email as the password

3. Set a password for access to your account.

Figure 3

Users create a password for their account

Returning Users: Login

Once the team leader is added to the system, they can add additional team members (users) and assign them roles. Once a user is added to a team, they can log in. See the section about roles for details.

1. Select the planning focus:

Figure 4

Planning focus selection view
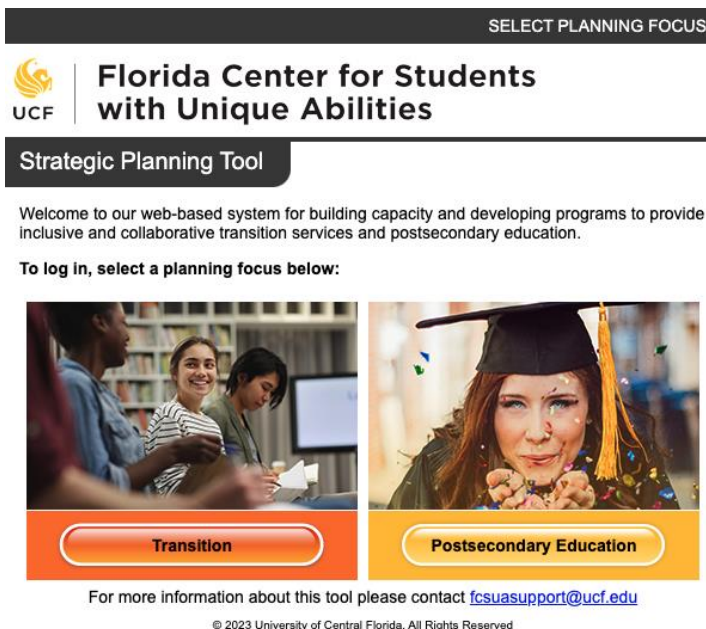
2. Enter the login information corresponding to your account:
   a. Email address
   b. Password

Figure 5

Enter email address and password to log in
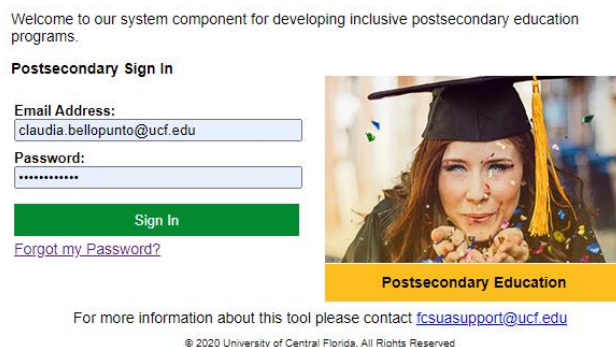
Reset Password

1. From the login page, click on the *Forgot my Password* link.

   Figure 6

   Link to reset password

2. Enter the email associated with the user in the system. The system will generate an error message if it does not recognize the email provided.

   Figure 7

   Request reset password

3. An email like the one below will arrive within 10-15 minutes from webmaster@transitionprogramtool.org. Users should check their spam folder in case their email client filters all automated messages there.

Figure 8

Email sent by the system with a temporary password

Online Strategic Planning Tool: Password Reset

webmaster@transitionprogramtool.org
To ● Claudia Bello Punto

Retention Policy   UCF Delete after 10 Years (10 years)

Your Online Strategic Planning Tool password for Postsecondary has been reset to: **drv9ttajhw**

Please change your password after logging into the system.

Thank you,
The FCSUA Team

4. To log in, use the temporary password provided in the email and the user's email address associated with the account.

Figure 9

Use a temporary password to log in

ACCOUNT SIGN IN: POSTSECONDARY

Florida Center for Students with Unique Abilities

UCF

Strategic Planning Tool

Welcome to our system component for developing inclusive postsecondary education programs.

Postsecondary Sign In

Email Address:
claudia.bellopunto@ucf.edu

Password:
79pg6v5alf

Sign In

Forgot my Password?

Postsecondary Education

For more information about this tool please contact fcsuasupport@ucf.edu

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5. Set a new password for the account.

   Figure 10

   Users set a new password for their account

System Components

The system's main menu includes five primary elements. The Dashboard is the landing page after logging in.

Figure 11

Main menu tabs
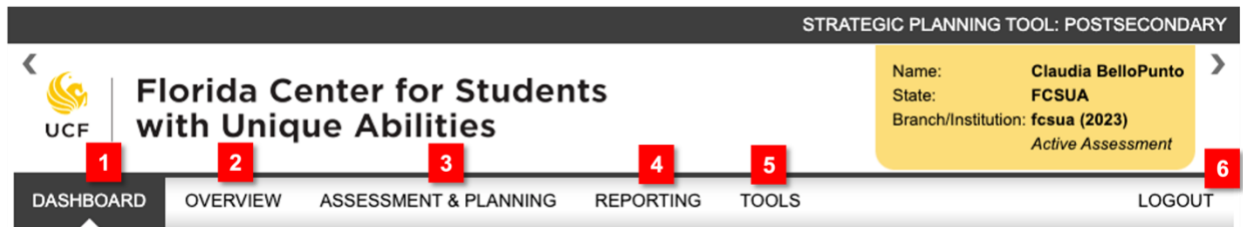
1. **Dashboard:** This is the "home base" tab. If no assessment is selected, the Dashboard will show the list of postsecondary sites to which the user has access.
2. **Overview**: Provides information regarding the purpose and features of the web-based system.
3. **Assessment and Planning:** Provides three steps that lead users through the following: (1) Enter the Assessment Date and Add Team Members, (2) Enter the Current Status for Each Domain Area, (3) Create Goals and Identify Strategies.
4. **Reporting:** Allows users to report the implementation progress and achievement of goals and outcomes at different times of the year.
5. **Tools:** Allows team leader and admin users to create assessment summaries and save them on Excel or PDF files.
6. **Logout:** Closes the session and exist the users from the system.

The Dashboard

1. To see the list of planning sites to which a user has access, click on the
   ⊟ **Postsecondary Assessments** link on the Dashboard. This link will display a table similar to the table below.

Figure 12

Portion of active postsecondary planning sites list

The table will show only active planning sites.

An active planning site is the most recent site created for a team. This planning site will list the most current team members and move goals forward if the team uses data from the previous year.

Example: XYZ State College 2023 plan – active site

XYZ State College 2022 plan – inactive site

The planning sites can be organized hierarchically when a postsecondary program has multiple locations (campuses) within the IHE, or the school district implements a postsecondary program through multiple IHEs; the system can support any of these options.

Figure 13

Hierarchy structure example

2. Click on [Show all assessments] at the upper right corner of the screen to see active and inactive planning sites.

> **Tip: Use the text next to the button as an indicator of which sites are shown in the table**

Figure 14

A table showing only active postsecondary sites

3. Find the planning site of interest in the table and click [Select] to start or edit it.

Figure 15

Use the Select button to edit or start a site in the table

Current Status Section

Once a site is selected, the Dashboard components will change to represent an up-to-date summary of where the team is in the assessment and planning process.

The *Current Status* section summarizes the team's work on a specific planning site.

Figure 16

Summary of team's information
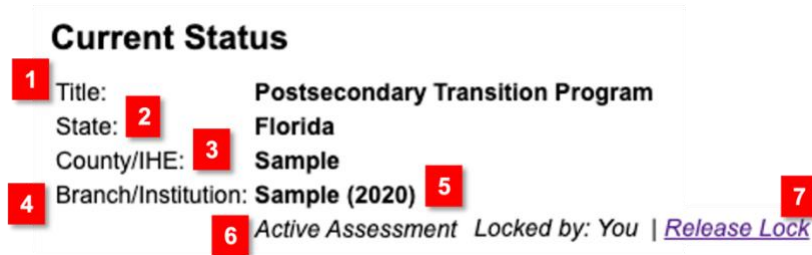
The first part of this section will include:

1. The title of the Plan if the team named it.
2. The state in which the IHE is located.
3. The school district or IHE name, depending on the structure designed for the specific IHE and potential branches.
4. The name of the IHE or IHE branch
5. The year corresponding to the planning site
6. The planning site's status indicates whether this is an active planning site. It shows if the team is working on the most recent planning site.
7. Lock status and release assessment lock link.

This section will look different depending on where the team is in the planning process.

1. If the team has not started the assessment, the screen will indicate the following:

   Figure 17

   Start new assessment option in the dashboard

2. If the team has already started an assessment, it would indicate the following:

   Figure 18

   Continue the assessment process option in the Dashboard.

3. If the team is summarizing their implementation progress and achievement of goals and outcomes through the reporting section, it will indicate the following:

Figure 19

Continue reporting option in the Dashboard

Reporting in progress. Click below to continue where you left off.

[CONTINUE REPORTING]   [SHOW HISTORY]

The following table summarizes where the team is in the assessment and planning process, indicating the progress in each step.

Figure 20

Summary of team assessment and planning process

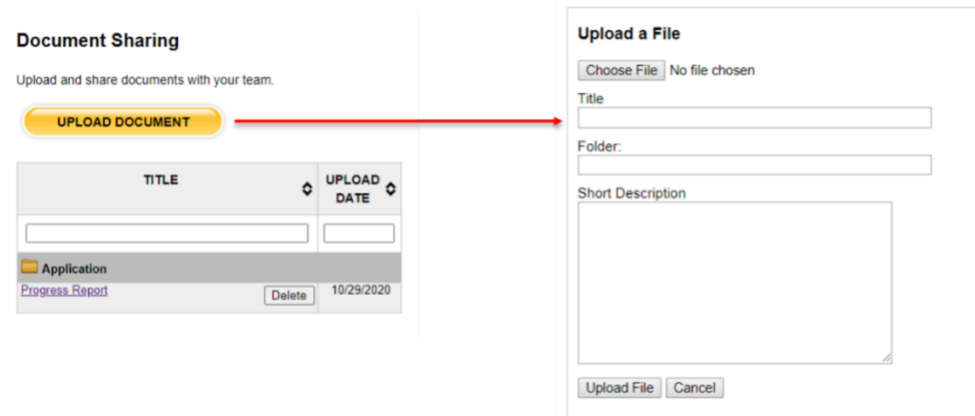| STEP	Not Started	In Progress	Complete
Step 1: Enter Team & Date			go to step 1
			Team Members 📄
Title			✔
Date			✔
Team			✔
Step 2: Assess Status			go to step 2
			Strengths & Needs 📄 | Assessment 📄
Student-Focused			✔
Faculty and Staff-Focused			✔
Program and Institution-Focused	◉		
Concept and Systems Development	◉		
Step 3: Make a Plan			go to step 3
			Goals 📄 | Goals by Domain Area 📄 | Tech. Asst. & Resource Needs 📄 Plan 📄 | Plan Data 📄
Student-Focused			✔
Faculty and Staff-Focused			✔
Program and Institution-Focused	◉		
Concept and Systems Development	◉		
Step 4: Report Progress			go to step 4
			Progress Report 📄
Student-Focused			✔
Faculty and Staff-Focused			✔
Program and Institution-Focused	◉		
Concept and Systems Development	◉		
Step 5: End of Year Report			go to step 5
			Final Report 📄
Student-Focused			✔
Faculty and Staff-Focused			✔
Program and Institution-Focused	◉		
Concept and Systems Development	◉		

* boxes that have a light grey background are sections that are not applicable because of previous selections in the assessment

Tip: Use the links next to the name of the step to move easily through the system

Download Documents

The summary table lets users download the assessment and plan files in PDF and Excel formats.

Step 1: The **Team Members** PDF file includes team members' names, organizations, positions, and roles.

Step 2:

1. The **Assessment** Excel file compiles the information entered during the assessment process and creates a file that includes the implementation, evidence, and priority ratings for each benchmark by domain. It also includes whether a team decided to develop a plan for the domain.
2. The **Strengths and Needs** PDF file summarizes the strengths and needs indicated in every benchmark.

Figure 21

Download documents with information related to Steps 1 and 2

Step 3:

1. The **Goals** PDF file compiles the goals entered in each domain.
2. The **Goals by Domain Area** PDF file separate the goals by domain area.
3. The **Tech. Asst.& Resources Needs** PDF file summarizes the additional resources and technical assistance requested by the team. The file is grouped by domains.
4. The **Plan** PDF file reflects all the information entered during the planning process. This file includes tables with team members, tasks, outputs, and outcomes organized by goal. It also consists of the strategies the team selected.
5. The **Plan Data** Excel file is a spreadsheet version of the previous file, allowing data manipulation efficiently.

Step 4: The **Progress Report** PDF file compiles the team progress report to evaluate their implementation progress, findings, and achievement of their goals and outcomes.

Step 5: The **Final Report** PDF file compiles the team progress report to evaluate their implementation progress, findings, and achievement of their goals and outcomes.

Figure 22

Download documents with information related to Steps 3, 4 and 5

* boxes that have a light grey background are sections that are not applicable because of previous selections in the assessment

Documents and Links Sharing Section

This section allows teams to upload files and add external links that might be helpful to the team during the assessment and planning process. These items are available to all team members regardless of their role.

Figure 23

Document sharing section where the team can organize files by topic

Click on [UPLOAD DOCUMENT] and the Upload a File form will appear. When sharing documents, the team can assign a title to the file, create folders to organize files by topics and write a short description or notes that will appear when hovering with the mouse cursor over the title.

Figure 24

Links section

Use the Links section to share online resources that help the team plan and implement the program. Click on to [ADD LINK] display the form. Use the Name field as a resource to distinguish and describe the links.

Assessment Lock

The assessment lock is in place to ensure that multiple users with edit privileges currently can access and modify an assessment simultaneously do not cause data conflicts.

The first team member accessing the assessment will hold the assessment lock. All other team members will have read-only privileges. The lock could be released when:

1. The team member who holds the lock exits the assessment,
2. The team member who holds the lock releases the lock through the link in the Dashboard,
3. The lock expires after an hour.

The assessment lock timer will always be in the tabs menu that identifies the step in which the user holding the lock is working.

Figure 25

Assessment lock timer
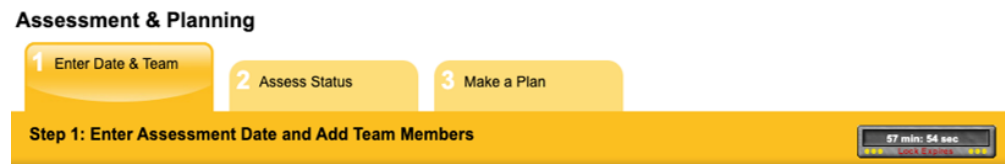
Close the assessment

To exit an assessment, users can select another assessment in the list of assessments available in the Dashboard or close the browser tab where the Online Planning Tool is open.

Release the assessment lock through the Dashboard

To release the assessment lock, users will

1. Navigate to the Dashboard tab at the beginning of the main navigation menu from any step of the planning tool.

Figure 26

Navigate to Dashboard
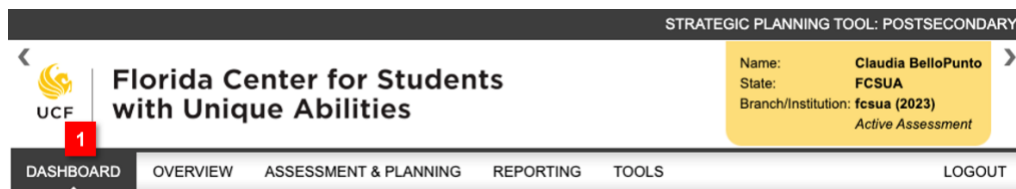
2. Click on the Release Lock link located in the Current Status section. This will allow other users with editing privileges to enter and save data in the database.

Figure 27

Release lock through the Current Status section

Assessment lock expires

The assessment lock will expire after an hour of inactivity. The user holding the lock will receive notifications every 15 minutes if data has not been saved. A pop-up message to extend the lock will show five minutes before the lock expires. The information in the form will be saved at that time.

Figure 28

Lock Expiration Reminder
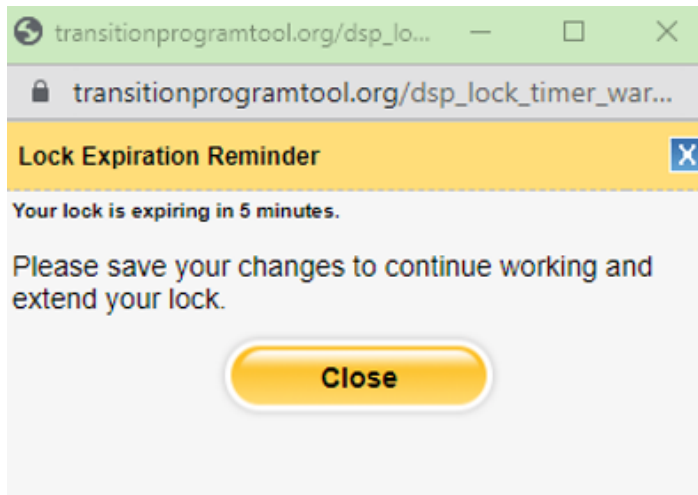
Assessment and Planning

This section provides three steps that lead teams through the following:

1. Enter the Assessment Date and Add Team Members
2. Enter the Current Status for Each Domain Area
3. Make a Plan

Step 1 Enter the Planning Date and Add Team Members

Figure 29

Step 1 of the assessment and planning process

In this first step, the team needs to identify all the team members and record their contact information. It includes the following steps:

1. **Enter Planning Date** and update this field every time the team works on the Plan.
2. **Plan Title** is optional but helps to identify the team and its work.
3. **Add New Team Member** indicating First Name, Last Name, Email, and Roles. Make sure to enter an active email address. This email will be utilized to log in, reset the

password, and communicate information about the system. A new account is created every time a new team member is added. The role assigned when the member is added will define how they can access and use the system. See the **Roles** section for details.

4. **Review Team Members** allows users to review team members already listed and update as needed:

   🔵 Edit team members' information.

   🔴 Remove team member

   According to their role description, these icons will be available only for Team Leaders, Notetakers, and Facilitators. See the **Roles** section for details.

   When a new site is created for returning teams, the team members' list is copied from the previous planning site. In this way, the user entering data does not need to create the team members list again, but it will need to be updated if a team member needs to be added or removed.

Roles

A user is active if associated with an active planning site (the team's most current site in the system). Suppose a user is not in the team members list of an active planning site; that user will be inactive and unable to log in.

1. **Team leader**
   - Can VIEW and EDIT the team's previous planning sites
   - Can add, remove, and change the roles of team members and notetaker
   - Is copied forward
   - Assigned only by system admins
2. **Team member**
   - Can VIEW only the active site
   - Cannot add, remove, or change the roles of team members.
   - Is copied forward
3. **Facilitators**
   - Can VIEW and EDIT planning sites on which they are assigned, and can VIEW the team's previous planning sites
   - Can add, remove, and change roles for team members and notetakers.
   - It is not copied forward
   - Assigned only by system admins
4. **Notetaker**
   - Assigned by team leader during the first meeting if needed
   - Can VIEW and EDIT within the assigned planning site
   - Can add and remove team members
   - Is copied forward

Step 2 Enter Current Status for Each Domain Area

Figure 30

Step 2 of the assessment and planning process

Once the team members list is complete, the next step is to work on the self-assessment. In this step, the team will:

1. Reflect on the level of implementation within each domain and its benchmarks.
2. Consider the availability and quality of the data.
3. Summarize the information generated.
4. Articulate strengths and needs using the summary of information generated.
5. Prioritize needs.
6. Identify which domain under which team will develop a plan. To develop a plan, users must check Develop Plan? as only the domains and benchmarks selected in this step will move to Step 3.
7. Save the data while moving through the process.

Tip: Use the *View Reflective Questions* and Indicators links to navigate the assessment process. The reflective questions help to determine the level of implementation within the benchmark, and the indicators can help to determine the existing data and data quality.

Step 3 Make a Plan

Step 3a Create Goals and Identify Strategies.

Step 3a will show only the domains and benchmarks selected to develop a plan in Step 2. If the team did not check the *Develop Plan* box in any domain, Step 3a would show the following message:

Figure 31

Message display in step 3a if the team did not select to develop a plan in any of the domain areas

> **There are currently no develop plans in progress.**
>
> Please check the develop plan checkbox of the practice you would like to develop for a specific focus area in tab 2 Assess Status.

The (Show Instructions) button will guide the team in writing their goal(s) and selecting the program development strategies to help them pursue it.

Figure 32

Step 3a shows the instructions and where to start the planning process.

To start the planning process and develop goals related to the domain and benchmarks:

1. Click on (Start Goals)

Figure 33

Start the planning process to create goals.

2. Click on [Add New Goal]

Figure 34

Add new goals.

This action will display the next planning step where the team will:

3. Identify a goal to address their needs.
4. Select strategies to pursue those goals.

> **Tip: Before developing the goals, click on the *View Example Goals* and *View Example Strategies* links to these examples as a reference to think about the next steps in planning and implementing the program.**

Figure 35

Write goals, select strategies, and start a plan.
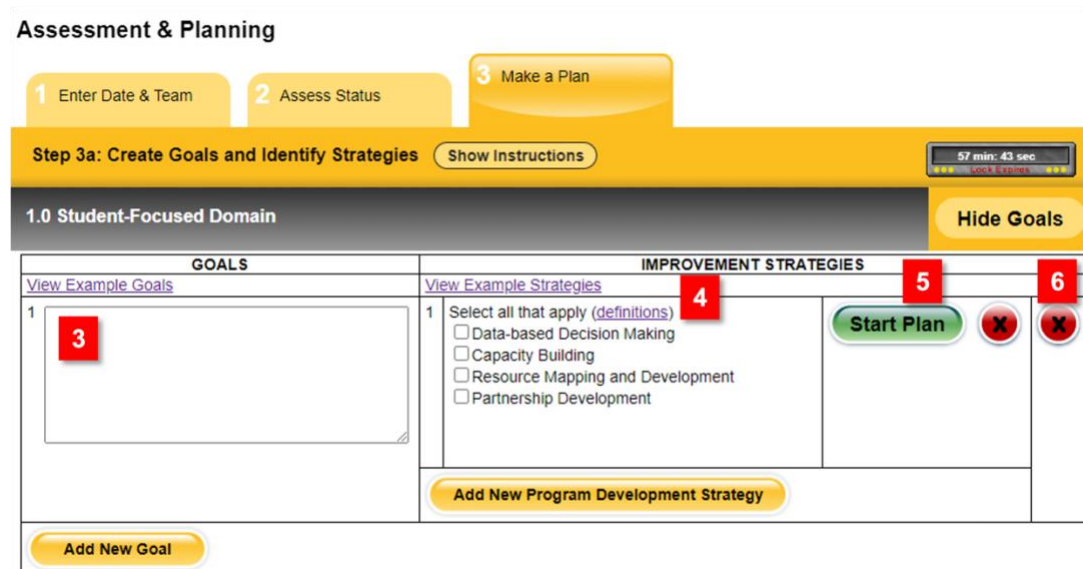
After goals and strategies are identified:

5. Click on [Start Plan] to develop the plan details, including tasks, the person responsible, timelines, outputs, intended outcomes, indicators, and data sources
6. Use the red buttons to remove a set of strategies or the entire goal. Please consider that there is no going back once these items have been removed; the team will need to write everything again. These buttons work in the same way throughout the system.

Each domain can have more than one goal and a set of strategies. Click on [Add New Goal] and [Add New Program Development Strategy] to keep adding goals and strategies.

Step 3b Create a Plan.

Once you click on the [Start Plan] button, the system will open a different view. In Step 3b, the team will develop the Plan's details, including tasks, the person responsible, timelines, outputs, intended outcomes, indicators, and data sources.

Figure 36

Summary of the goal and strategies within the domain area

After clicking on the [Start Plan] button, the team will:

1. Add tasks, the person responsible, and a projected completion date.

Figure 37

Tasks list to accomplish the goal

Tip: Notice the red outlines in every text area indicating this task has not been saved yet. The user entering data should use the *Save All* button frequently, making sure the data are saved in the database. These red outlines will appear across Step3b every time the team creates a task, output, or outcome and has not saved it.

2. Add Outputs/Products necessary to achieve the goal.
   Use the description and   View Examples   link as guidance.

Figure 38

Outputs or products needed to achieve the goal

3. Add the Expected Outcomes, Indicators, and Data Sources. Definitions for these items, the relationship between them, and examples are provided in this section.
   Use the   View Examples   link as a reference.

Figure 39

Outcomes, indicators, and data sources

4. Answer questions about additional stakeholders, resources, and technical assistance needs.

Figure 40

Questions about additional resources the team might need to implement the Plan


Ensure to use the Save button once these questions have been answered.

Copy Goals from Previous Plan

The FCSUA Strategic Planning Tool includes a valuable function for returning teams as they plan from year to year. Teams can copy a goal and the data related to it, such as tasks, outputs, and outcomes, from the previous Plan.

Figure 41

View and copy the previous year's goals to the current Plan
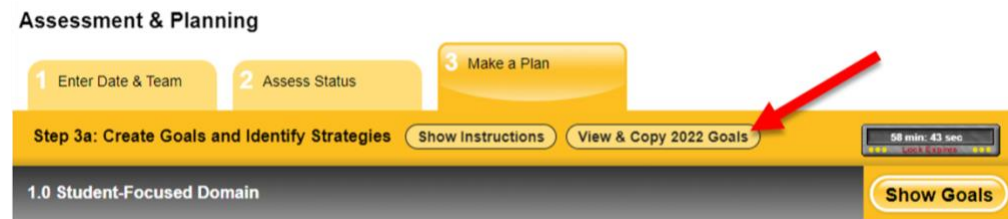
Once the team is at Step 3a to start the planning process, the system will "search" for previous planning sites; if such exists, the option to View & Copy 2022 Goals will appear next to the instructions button.

1. Click on View & Copy 2022 Goals button, and a new view will appear.

2. Click on [Copy plan to current year] button. This action will move the goal and data related to this goal, including strategies, tasks, outputs, outcomes, indicators, data sources, and requests for additional stakeholders, resources, and technical assistance. Each goal needs to be copied individually.

Figure 42

Copy a goal and associated plan to the current year.

3. Look for the green sign indicating the goal has been copied.

Figure 43

Green signal indicating the goal has been copied

4. Return to your current planning using the [Return to Step 3a] button at the top of the page.

Figure 44

Return to Step 3a once the data are copied

To copy a goal from a previous year to the current year, you must have selected *Develop Plan* for at least one benchmark in the target domain during Step 2. If not, the following message will appear:

Figure 45

Error message if the team did not select the Develop Plan box for a particular domain

Where are my Goals?

You have goals defined for Student-Focused Domain that are not listed because you have not selected to develop a plan for any Benchmark in Student-Focused Domain. To view these goals please select a benchmark in step 2 and click the Develop Plan checkbox.
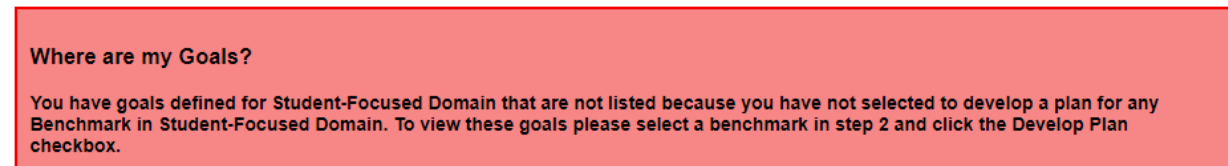
As an example:

XYZ State College has worked on the Student-Focused domain for the past year. The team wrote their goals, created tasks, and assigned the person responsible along with possible completion dates. At this point, the planning process begins for the following year. The team summarizes their evaluation findings using the report functions and assesses their past year's progress. Because some tasks are not accomplished, the team decides to keep working on the Student-Focused domain, reuse the goal and tasks, and edit some outputs and outcomes. By copying the information from the last year's plan, they can move the data forward to the next year's plan and continue working on it.

To copy forward the previous year's information, the team leader or notetaker must select the Develop Plan box during the assessment process in Step 2 for at least one of the benchmarks within the Student-Focused domain. Otherwise, the data will not have a place to "live," and the error message mentioned previously will appear.

Reporting

At different times of the year, the teams can access this section to create progress and end-of-the-year reports to summarize their implementation progress, evaluation findings, and achievement of their goals and outcomes.
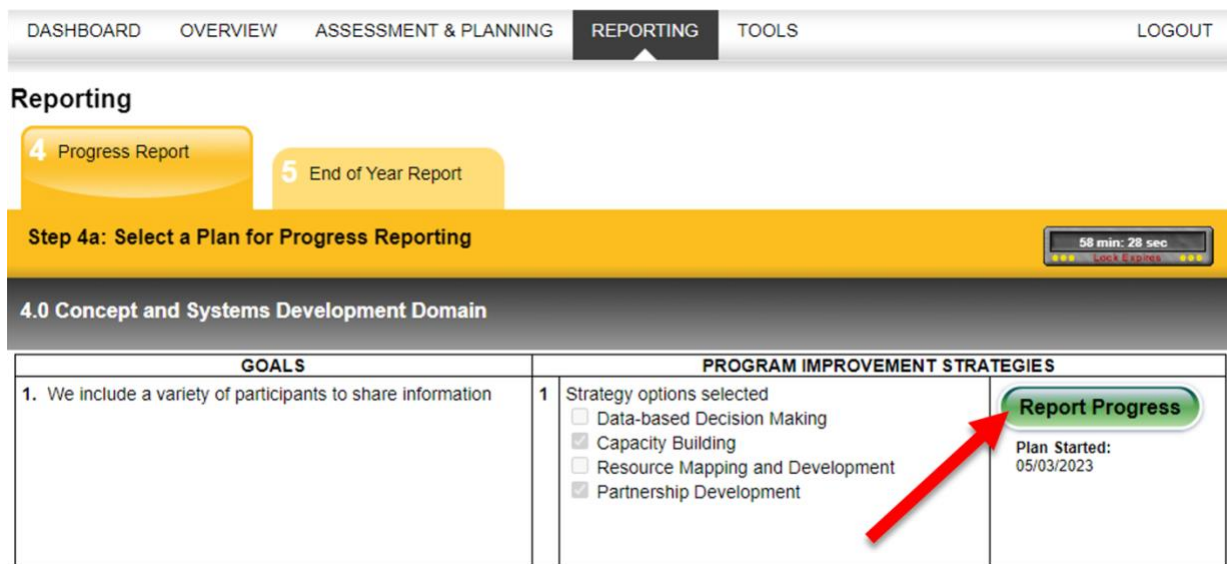
The goals written in the Assessment and Planning section will be reviewed in both cases. To start the report, click on Report Progress the button.
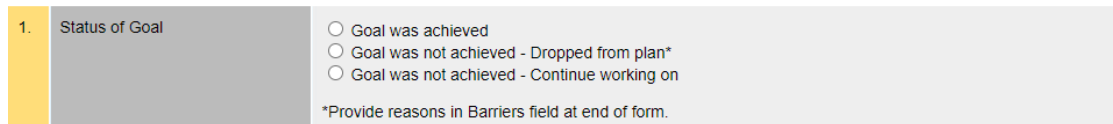
Figure 46

Develop a report to summarize progress implementing the plan.

Once in the Progress or End of Year Report:

1. Indicate the status of the goal.

    Figure 46

    Section to indicate the status of a goal on the Progress Report

For the End of Year Report, space is provided to summarize each aspect of the Plan, including a summary of goal achievements.

Figure 44

Section to indicate the status of a goal for the End of Year Report

2. Indicate the status and next steps regarding the tasks, outputs, and outcomes.

Figure 45

Indicate the status of tasks in the Progress Report

Sections to report outputs and outcomes are like tasks; they include the status and next steps choices, with room to provide a summary. The End of Year report includes space for an overall summary.

Figure 46

Sections to indicate the status of tasks, outputs, and outcomes for the End of Year Report

3. Indicate, if applicable, whether the team included additional stakeholders or received other resources and technical assistance and provide an explanation.
4. In the End of Year Report, indicate any barriers that inhibited the Plan's implementation, as this information will be useful in future planning.

Figure 47

Identify any barriers inhibiting the implementation process.

5. In the End of Year Report, indicate specific facilitators who helped foster the plan's implementation, information also valuable for future planning.

Figure 48

Facilitators that helped during the implementation process

Tip: During both reports, please save the information entered as the forms do not save automatically

Technical Soundness

Background

The Center uses the Online Strategic Planning Tool, which integrates evidence-based, promising practices, and implementation science to facilitate strategic planning. Previous research has indicated that teams with higher technical soundness are correlated with annual goal attainment. Technical soundness is used to inform the Center on the implementation and achievement of these strategic plans and provide teams feedback on how to improve their strategic planning to successfully reach their goals and improve outcomes for students with unique abilities.

Components of Technical Soundness

The technical soundness is uploaded by the Center into the Dashboard and can be found in the Document Sharing area. The file is in an Excel format, and it is located inside the Technical Soundness Quality Check Performed folder.

Figure 49

Technical Soundness folder and Excel files in the Dashboard

The technical soundness file is uploaded by the Center within three months of finalizing the Florida Postsecondary Education Program Planning Institute (FloridaPEPPI). The year included in the file name can be utilized to identify the most recent file uploaded. Once the Excel file is

available, the team can proceed to revise the suggestion made for plans that partially or did not achieve technical soundness.

The Excel file is a workbook that can contain multiple sheets depending on the number of goals in the plan. As shown in Figure 50, if the plan has two goals, one in the Student-Focused domain and the other in the Faculty and Staff-Focused domain, the Excel file will include two sheets.

Figure 50

Technical Soundness Excel file with multiple sheets

Makes sure to revise all Goals, Tasks, and Outcomes marked as partially or not technically sounded. If any of these items are included in any of these categories, there will be suggestions for improvement included.

Figure 51

Improvement suggestions will show in "How to Improve Quality" column

If the team decides to improve the plan after looking at the suggestions, make sure to update it in the **Online Strategic Planning Tool, not in the Excel file.** The Excel file is only a reference for the team to look at the improvement suggestions but will not update automatically to the Online Strategic Planning Tool after edits have been made.

Tip: If available, utilize two screens to revise technical soundness Excel file. One screen will have the file and the other the Online Strategic Planning Tool to make the updates. Otherwise, print the Excel file and have the Online Strategic Planning Tool up on the screen to make the edits. Don't forget to click Save after updating.

Tools

The Tools section is only available to team leaders and admin users. In this section, team leaders can use the FCSUA Strategic Planning Tool to generate a report with their IHE's information across all years. It is an easy way to compile data about the assessment and planning processes.

Once in this section, click on *Reports*:
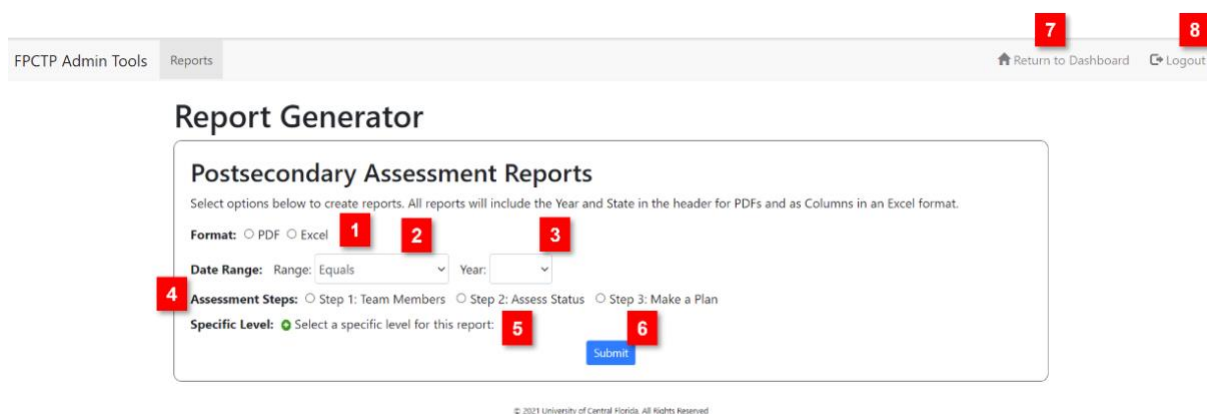
Figure 52

Access the Report Generator in the Tools section
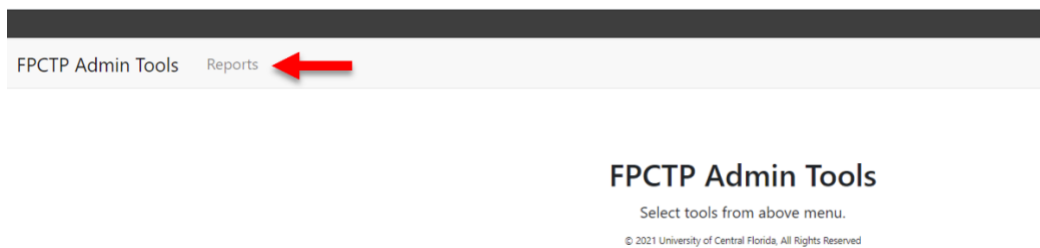
The screen will display the Report Generator. Once in the Report Generator section, users will be able to select the criteria for the report.

Figure 53

Report Generator

To create a report:

1. Select the output file format
2. Select the year range of the report. The options are:
   a. Equals
   b. During or before
   c. During or after
   d. Between and includes
3. Indicate the year or year range for the report
4. Select the data to include in the report
   a. Step 1: **Team Members** consist of team members' names, emails, organizations, positions, and roles.
   b. Step 2: **Assess Status** consists of the assessment title, domain area, benchmarks, strengths, needs, and developing a plan.
   c. Step 3: **Make a Plan** consist of the assessment title, domain area, goals, additional resources request, technical assistance needs, and additional stakeholders.
5. To specify the report level:
   a. Click on the green plus ➕ icon.
   b. Find and click on Florida in the Scope Selection window that will open.
   c. Find and click on the IHE name.

Figure 54

Report Scope Selection
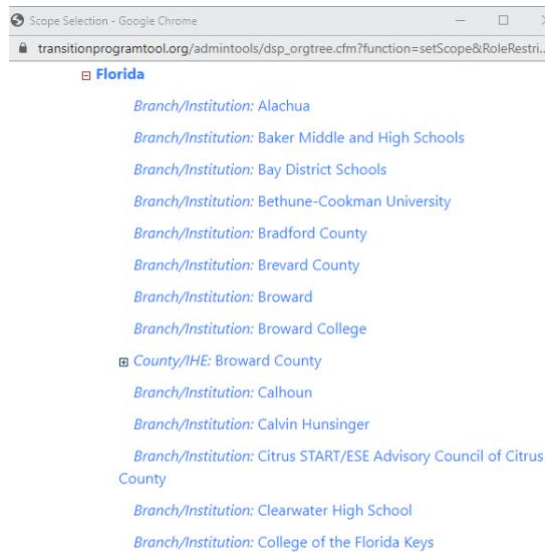
6. Click submit to obtain the report. A report status screen will open to tell you to wait for the information to download. After the report is downloaded, click anywhere on the screen to exit.

Figure 55

Report Status Screen

Running reports.
Please wait...

After downloading, click anywhere on this page to continue.
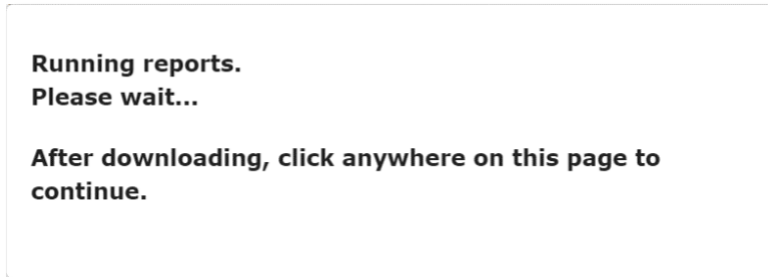
7. Click on Return to Dashboard to go back to the summary table and other system components.
8. Click on Logout to exit the Online Strategic Planning Tool.

Technical Support

Contact technical support to:

1. Report bugs in the system.
2. Request an account (when team leaders, facilitators, or users need access to multiple plans corresponding with their roles or position).
3. Request update of name, last name, and email address.
4. Request help logging into the system and navigating the assessment and planning process.

Use the email at the end of the landing page: https://www.transitionprogramtool.org

Figure 56

Email to contact technical support