Entering Objectives, Tasks, and Status Reports into SPOL

Log in at https://com.strategicplanningonline.com/SPOLNET/ using your network ID and password.

Select the Planning module:

Objectives

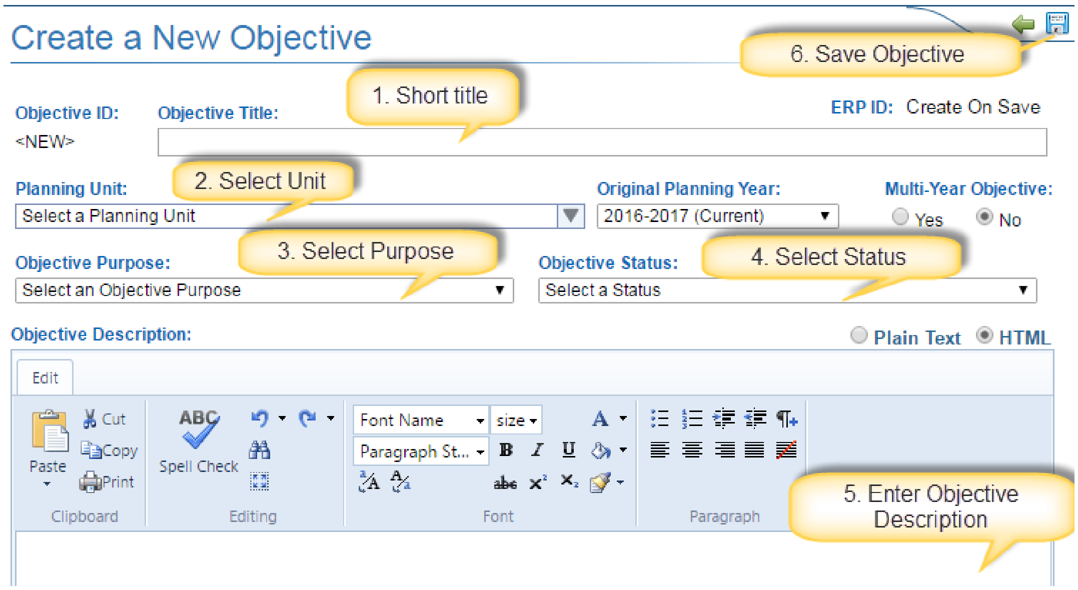
Create objectives for intended outcomes of activities being undertaken to achieve goals. When creating an Objective you should:

- tie the Objective to any relevant Strategic Goals, Planning Unit Goals, or Annual Priorities
- complete the Intended results and
- complete the Assessment Measures

In creating your Objectives, think about the overarching goals of your department and ways in which you wish to improve your operations in the coming year. Objectives should not be standard operating procedures that your department will carry out regardless of new planning or goals. Keep in mind that the planning process and creating unit plans and objectives is part of continuous improvement for your department and COM. Not completely meeting your objective within the planning cycle is not a failure, it is an opportunity to reassess and adjust your approach appropriately.

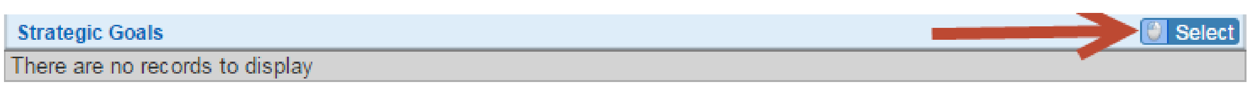
Objectives should be SMART:

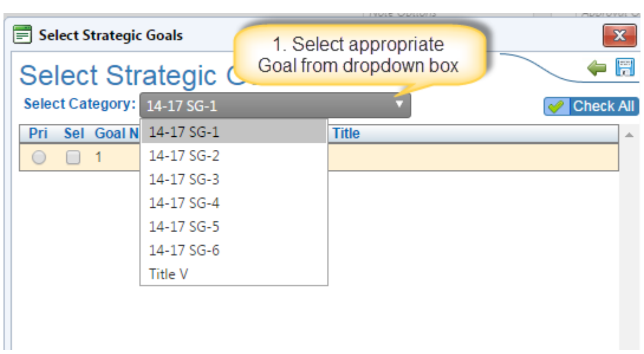
- Specific
- Measurable
- Actionable
- Realistic
- Timebound

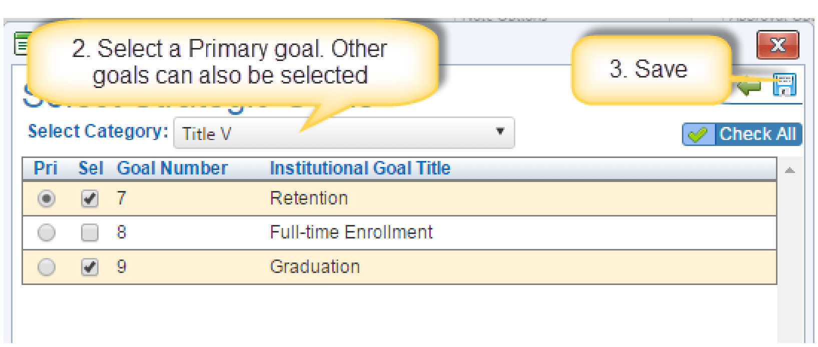


Once the Objective is created SPOL will take you to the Objective Details page for the new Objective.

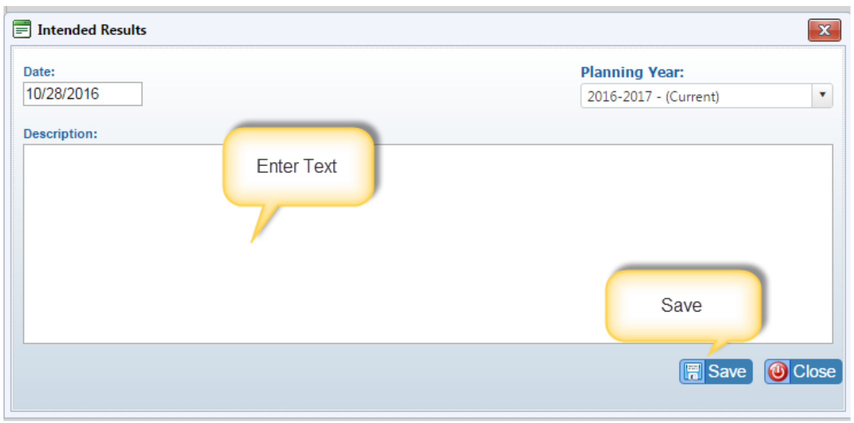
Select relevant Strategic Goals, Planning Unit Goals, or Annual Priorities that the Objective should be tied to.



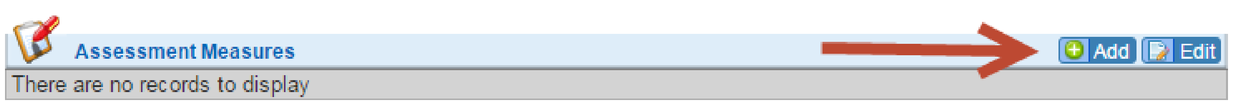


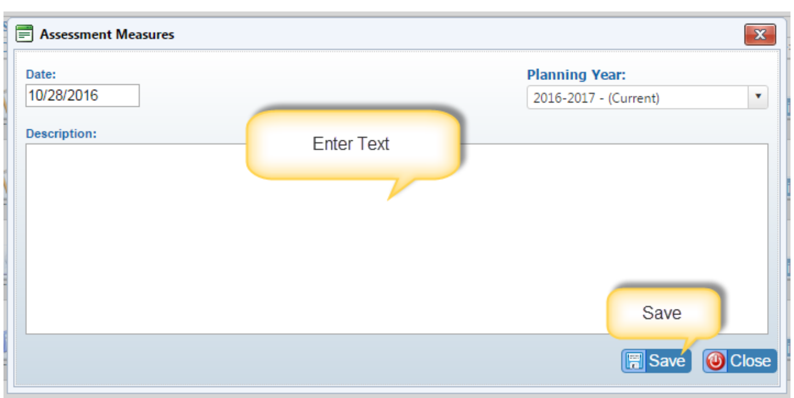


Create Intended Results – these are the criteria for success of your Objective. Think about what results you expect to see from the Objective and associated Tasks. Different Intended Results should be added individually, not all combined into one.

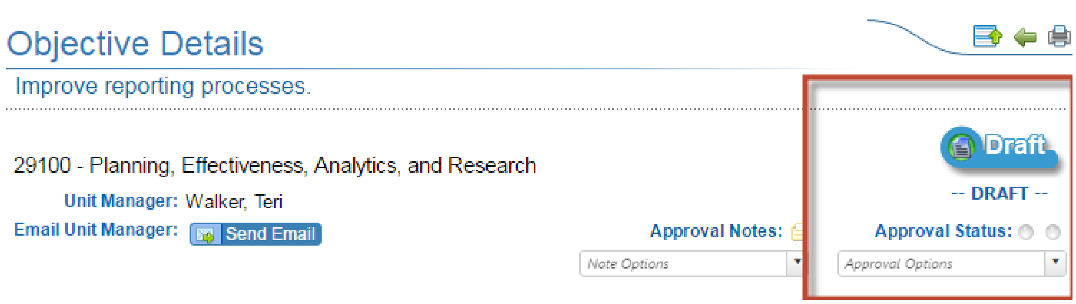


Create Assessment Measures – how you will measurably know if you achieved the results intended. What data will you use to show your outcomes and how will you collect that data?





Review the Objective. Once you are satisfied with your objective and ready to submit it for approval. At the top of the Objective Details page the Approval status should say DRAFT.



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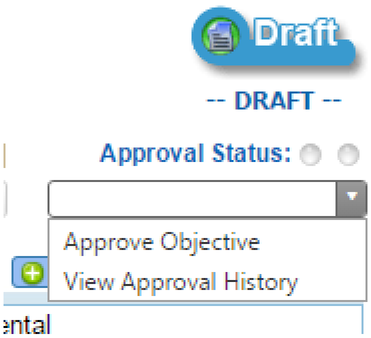
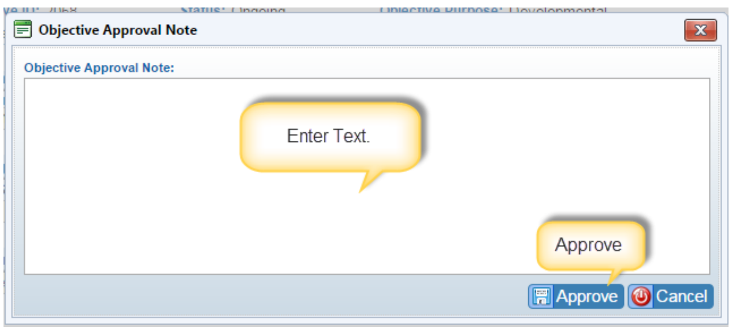
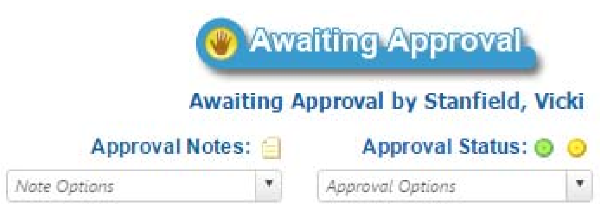
Click on the drop down box Approval Options.



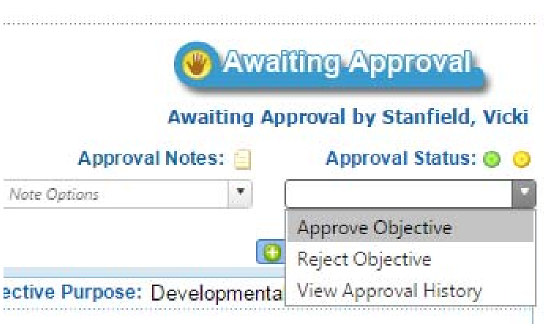
Select Approve Objective. This will bring up a window for an Objective Approval Note. You may wish to enter a note here to be sent along with the Approval notice to the manager of your parent unit.



Once you enter your note and hit Approve an email will automatically be generated and sent to your parent unit manager.



Your Objective may be Approved or Rejected. If Rejected a note should be received regarding why it was rejected and what needs to be addressed for approval.

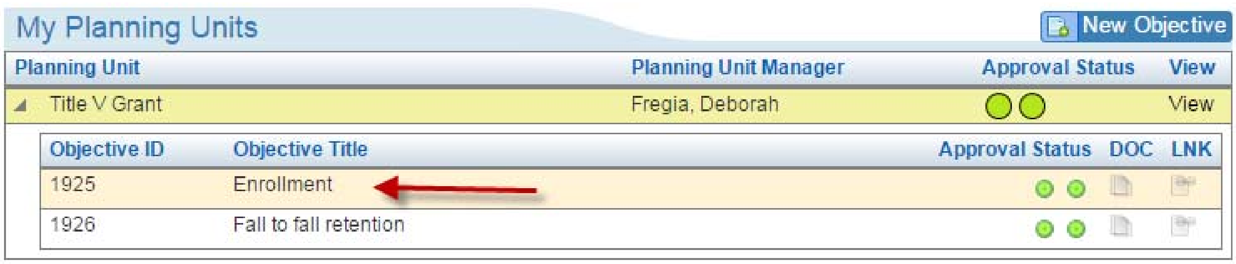


Once your Objectives are approved, you should begin moving forward. It is recommended that you create Tasks and complete Status Reports at least once a month.

Tasks

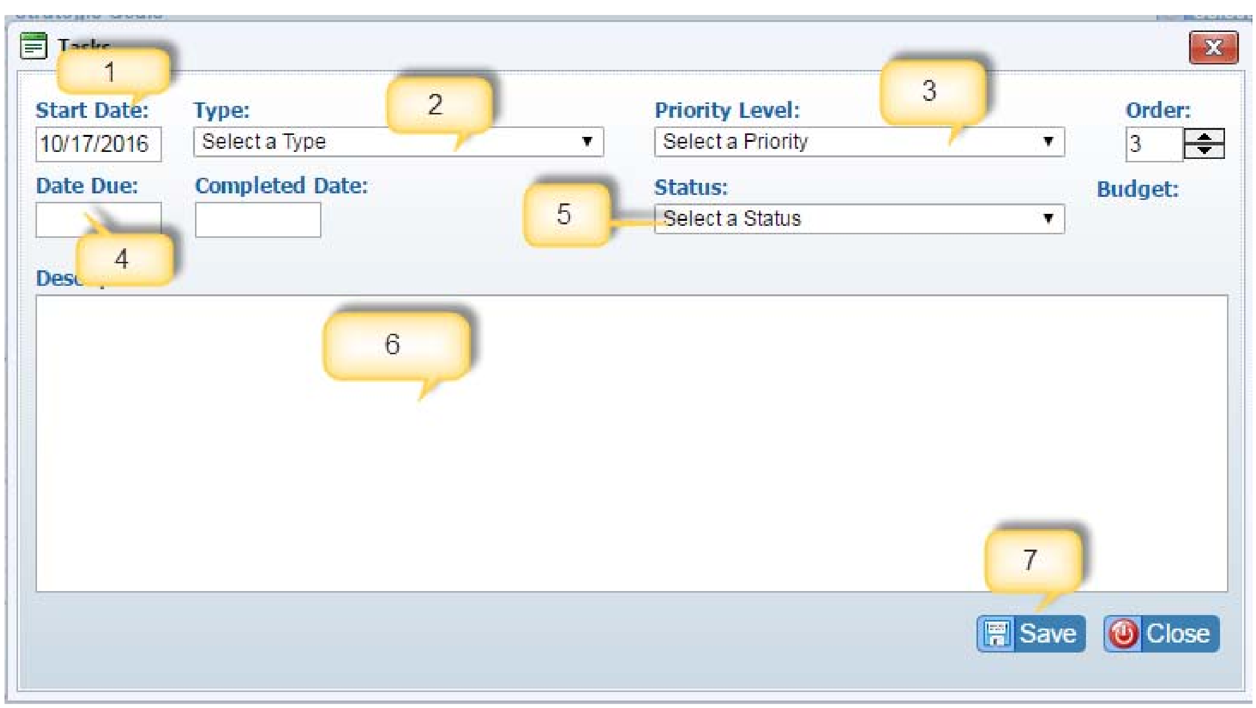
Tasks are specific actions or activities necessary to meet objectives. They should be concrete and time bound.

1. Select the Objective for which you wish to create a Task. Double click.



2. Scroll down to the section called Tasks. Select Add.

3. Fill out Task window.



4. Assign the task as appropriate.

Status Reports

Status Reports should be completed regularly to maintain a record of the progress being made towards the Objective and the Tasks supporting the Objective.

Open the appropriate Objective and scroll down to Status Reports. Click Add.