Planning and Program Review Processes
Creating a Copy of a Plan

Prepared by Keith Wurtz
Director, Office of Research & Planning

Session Objectives

- How do you copy a 2010-2011 Annual Plan to a 2011-2012 Program Review?

- How do you copy a 2010-2011 Annual Plan to a 2011-2012 Annual Plan?

- How do you copy a 2010-2011 Program Review to a 2011-2012 Annual Plan?

How do you copy a 2010-2011 Annual Plan to a 2011-2012 Program Review?

Step 1: Click on "Create a Plan by Copy"

Planning & Program Review

Plans for Test 1

- Create Plan
- Create Plan by Copy

- **Name:** PPR 2011-12 Test
  Version: 1
  Group: 2011 - 2012
  Type: CHC Program Review 2011-2012
  Last Modified On: 8/17/2011 8:15:51 AM
  Last Modified By: Keith Wurtz
  State: Available for Editing
  State By: Keith Wurtz

  - Edit Plan
  - View Versions
  - View Objective Priority List
  - Reports
  - View Plan

Step 2: Choose the plan to copy from. For most people there will be only one.

Planning & Program Review

Plans for Test 1 >> New Plan by Copying

Do you want to copy this plan to create a new plan?

* **Plan to Copy From:** Test 1: 2010 - 2011: Copy of Test Unit Plan 1 ▼
* **Plan Group :** {empty} ▼
* **Plan Type :** {empty} ▼
Fill Progress Report : ☐

No Yes

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Step 3: Choose the Plan Group. This is the current academic year and the year in which the Annual Plan or Program Review is being written.

Planning & Program Review

Home

Plans for Test 1 >> New Plan by Copying

Do you want to copy this plan to create a new plan?

* Plan to Copy From :   Test 1: 2010 - 2011: Copy of Test Unit Plan 1
* Plan Group :   2011 - 2012
* Plan Type :   {empty}
Fill Progress Report :   ☐

No   Yes

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Step 4: Choose the **Plan Type** or the plan that you are copying to. In this case we are copying from the 2010 – 2011 Annual Plan to the 2011 – 2012 Program Review.

Step 5: You are given a choice to check or not check "**Fill Progress Report**."

▸ Checking the "Fill Progress Report" box will automatically populate Question 8 on the Program Review with all of the goals and objectives from the 2010-2011 Annual Plan.

Step 6: Click "Yes"

Planning & Program Review

Plans for Test 1 >> New Plan by Copying

Do you want to copy this plan to create a new plan?

* **Plan to Copy From :** Test 1: 2010 - 2011: Copy of Test Unit Plan 1 ▾
* **Plan Group :** 2011 - 2012 ▾
* **Plan Type :** CHC Program Review 2011-2012 ▾
Fill Progress Report : ☑
No Yes

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Example

Name : Copy of Copy of Test Unit Plan 1
Principal Preparer : Matthew Lee
Progress Report Preparer : Keith Wurtz
Progress Report Type : Action Level Report

Version: 1
Group: 2011 - 2012
Type: CHC Program Review 2011-2012
Last Modified On: 9/6/2011 12:12:05 PM

8. Progress on Prior Goals

Please provide an update on the unit's progress in meeting the goals and objectives identified in your last Three-Year Action Plan.

- **1 - Goal - Increase number of students served**

  Cum sociis natoque penatibus et magnis dis parturient montes, nascetur ridiculus mus. Donec ac ornare mi. Vivamus luctus, urna id moll imperdiet diam a sapien dignissim id imperdiet ipsum sodales. Etiam in adipiscing nunc.

  Priority Rank: 1
  Objectives:
    - **1.1 - Objective - Mount an awareness campaign.**

9. Three-Year Action Plan (Goals, Objectives, and Resources)

Reflect on your responses to all the previous questions. Complete the Three-Year Action Plan, entering the specific program goals and objectives you weaknesses. Assign an overall priority to each goal and each objective. In addition, enter any resources required to achieve each objective.

- **1 - Goal - Increase number of students served**

  Cum sociis natoque penatibus et magnis dis parturient montes, nascetur ridiculus mus. Donec ac ornare mi. Vivamus luctus, urna id mollis comi imperdiet diam a sapien dignissim id imperdiet ipsum sodales. Etiam in adipiscing nunc.

  Priority Rank: 1
  Objectives:
    - **1.1 - Objective - Mount an awareness campaign.**

Question Key
2010-2011 AP to 2011-2012 PPR

2010-2011 Annual Plan	2011-2012 Program Review
DID NOT COPY	1. Description of Program
DID NOT COPY	2. External Factors
DID NOT COPY	3. Progress on SLOs/SAOs
DID NOT COPY	4. SLOs/SAOs Results
DID NOT COPY	5. Performance on Rubric Components
DID NOT COPY	6. Evaluation
DID NOT COPY	7. Vision
4. Progress on Prior Goals*	8. Progress on Prior Goals*
5. Three-Year Action Plan (Goals & Objectives)	9. Three-Year Action Plan (Goals & Objectives)
DID NOT COPY	10. Comments

*Only copies over if "Fill Progress Report" is checked.

How do you copy a 2010-2011 Annual Plan to a 2011-2012 Annual Plan?

Step 1: Click on "Create a Plan by Copy"

Step 2: Choose the plan to copy from. For most people there will be only one.

Planning & Program Review

Plans for Test 1 >> New Plan by Copying

Do you want to copy this plan to create a new plan?

* **Plan to Copy From :** Test 1: 2010 - 2011: Copy of Test Unit Plan 1
* **Plan Group :** {empty}
* **Plan Type :** {empty}
Fill Progress Report : ☐

[No] [Yes]

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Step 3: Choose the Plan Group. This is the current academic year and the year in which the Annual Plan or Program Review is being written.

Planning & Program Review

Plans for Test 1 >> New Plan by Copying

Do you want to copy this plan to create a new plan?

* **Plan to Copy From :** Test 1: 2010 - 2011: Copy of Test Unit Plan 1 ▼
* **Plan Group** 2011 - 2012 ▼
* **Plan Type :** {empty} ▼
Fill Progress Report : ☐

No   Yes

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Step 4: Choose the **Plan Type** or the plan that you are copying to. In this case we are copying from the 2010 – 2011 Annual Plan to the 2011 – 2012 Annual Plan.

Planning & Program Review

Plans for Test 1 >> New Plan by Copying

Do you want to copy this plan to create a new plan?

* **Plan to Copy From :** Test 1: 2010 - 2011: Copy of Test Unit Plan 1 ▼
* **Plan Group :** 2011 - 2012 ▼
* **Plan Type :** CHC Annual Planning 2011-2012 ▼
Fill Progress Report : ☐

No   Yes

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Step 5: You are given a choice to check or not check "**Fill Progress Report**."

▸ Checking the "Fill Progress Report" box will automatically populate Question 4 on the Annual Plan with all of the goals and objectives from the 2010-2011 Annual Plan.

Step 6: Click "Yes"

Planning & Program Review

Plans for Test 1 >> New Plan by Copying

Do you want to copy this plan to create a new plan?

* Plan to Copy From :   Test 1: 2010 - 2011: Copy of Test Unit Plan 1   ▼
* Plan Group :   2011 - 2012   ▼
* Plan Type :   CHC Annual Planning 2011-2012   ▼
Fill Progress Report :   ☑
No   Yes

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Question Key
2010-2011 AP to 2011-2012 AP

2010-2011 Annual Plan	2011-2012 Annual Plan
1. Significant Changes	1. Significant Changes
2. Effectiveness Measure Results	2. Effectiveness Measure Results
3. Conclusions about Progress	3. Conclusions about Progress
4. Progress on Prior Goals*	4. Progress on Prior Goals*
5. Three-Year Action Plan (Goals & Objectives)	5. Three-Year Action Plan (Goals & Objectives)
6. Additional Items for Consideration	6. Additional Items for Consideration

*Only copies over if "Fill Progress Report" is checked.

How do you copy a 2010-2011 Program Review to a 2011-2012 Annual Plan?

Step 1: Click on "Create a Plan by Copy"

Planning & Program Review

Plans for Research and Planning

- Create Plan
- Create Plan by Copy

- **Name:** ORP Program Review 2010-2011
  Version: 32
  Group: 2010 - 2011
  Type: CHC Program Review 2010 - 2011
  Last Modified On: 12/22/2010 9:10:56 AM
  Last Modified By: Keith Wurtz
  State: Submitted (**Finalized**)
  State By: Keith Wurtz

  - View Versions
  - View Objective Priority List
  - Reports
  - View Plan
  - Lock Plan for Comments
  - Reopen Plan

Step 2: Choose the plan to copy from. For most people there will be only one.

Planning & Program Review

Plans for Research and Planning >> New Plan by Copying

Do you want to copy this plan to create a new plan?

* Plan to Copy From : Research and Planning: 2010 - 2011: ORP Program Review 2010-2011 ▼
* Plan Group : {empty} ▼
* Plan Type : {empty} ▼
Fill Progress Report : ☐

No   Yes

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Step 3: Choose the Plan Group. This is the current academic year and the year in which the Annual Plan or Program Review is being written.

Step 4: Choose the **Plan Type** or the plan that you are copying to. In this case we are copying from the 2010 – 2011 Program Review to the 2011 – 2012 Annual Plan.

Step 5: You are given a choice to check or not check "**Fill Progress Report**."

▸ Checking the "Fill Progress Report" box will automatically populate Question 4 on the Annual Plan with all of the goals and objectives from the 2010-2011 Planning and Program Review.

Step 6: Click "Yes"

Planning & Program Review

Plans for Research and Planning >> New Plan by Copying

Do you want to copy this plan to create a new plan?

* Plan to Copy From : Research and Planning: 2010 - 2011: ORP Program Review 2010-2011 ▾
* Plan Group : 2011 - 2012 ▾
* Plan Type : CHC Annual Planning 2011-2012 ▾
Fill Progress Report : ☑
No Yes

Name : Copy of ORP Program Review 2010-2011
Principal Preparer : Keith Wurtz
Progress Report Preparer :
Progress Report Type : Action Level Report

Version: 1
Group: 2011 - 2012
Type: CHC Annual Planning 2011-2012
Last Modified On: 8/16/2011 3:41:26 PM
Last Modified By: Keith Wurtz
State: Available for Editing
State By: Keith Wurtz

4. Progress on Prior Goals

Please provide a status update on meeting the program goals and objectives identified in your last program review (Please refer to question 9 in your most recent program review).

- **1 - Goal - Increase number of students served**

  Cum sociis natoque penatibus et magnis dis parturient montes, nascetur ridiculus mus. Donec ac ornare mi. Vivamus luctus, urna id mollis commodo, nulla mauris accumsan mi, sit imperdiet diam a sapien dignissim id imperdiet ipsum sodales. Etiam in adipiscing nunc.

  Priority Rank: 1
  Objectives:

  - **1.1 - Objective - Mount an awareness campaign.**

    Nunc dui sapien, pulvinar nec lacinia id, pretium id leo. Duis eget lorem sapien, et tincidunt lacus. In lacinia tellus sed arcu semper sollicitudin. Suspendisse potenti. Donec at lig lectus, a iaculis nibh. Praesent et sem nisl. Ut id turpis sed lacus adipiscing lobortis. Suspendisse vel velit libero. Donec mollis mattis nunc sed gravida.

5. Three-Year Action Plan (Goals, Objectives, and Resources)

Revise and update as needed the Three-Year Action Plan, entering the specific program goals and objectives you have formulated to maintain or enhance your strengths, or to address identified order, with Goal 1 being most important, and assign an overall priority to each objective. You may create new goals and objectives, and/or you may carry over goals and objectives from last yea addition, enter any resources required to achieve each objective. (Please refer to question 9 in your most recent program review)

- **1 - Goal - Increase number of students served**

  Cum sociis natoque penatibus et magnis dis parturient montes, nascetur ridiculus mus. Donec ac ornare mi. Vivamus luctus, urna id mollis commodo, nulla mauris accumsan mi, sit amet imperdiet diam a sapien dignissim id imperdiet ipsum sodales. Etiam in adipiscing nunc.

  Priority Rank: 1
  Objectives:

  - **1.1 - Objective - Mount an awareness campaign.**

    Nunc dui sapien, pulvinar nec lacinia id, pretium id leo. Duis eget lorem sapien, et tincidunt lacus. In lacinia tellus sed arcu semper sollicitudin. Suspendisse potenti. Donec at ligula dia lectus, a iaculis nibh. Praesent et sem nisl. Ut id turpis sed lacus adipiscing lobortis. Suspendisse vel velit libero. Donec mollis mattis nunc sed gravida.

Question Key
2010-2011 PPR to 2011-2012 AP

2010-2011 Program Review	2011-2012 Annual Plan
DID NOT COPY	1. Significant Changes
DID NOT COPY	2. Effectiveness Measure Results
6. Performance on Rubric Components	3. Conclusions about Progress
9. Progress on Prior Goals*	4. Progress on Prior Goals*
10. Three-Year Action Plan (Goals & Objectives)	5. Three-Year Action Plan (Goals & Objectives)

*Only copies over if "Fill Progress Report" is checked.