2020-2021 Program Review Progress Report
Training Materials for WVC Program/Department Coordinators

Step 3 of 3: Assessing goals and adding action plans/resource requests; answering PR questions

Completing the Strategic Initiative
Training on completing the Program Review in eLumen for Program/Department Coordinators

Strategic Initiative Cycle: Action Plans and Resource Requests

Assessing Goals (Prior)

- In eLumen the Strategic Initiative (SI) is equivalent to the Program Review.
- The instructions that follow assume that Step 2 of 3 – Adding Collaborators and Goals is complete. This means both the prior goals and the new goal(s) for the program have been brought into the appropriate SI sections for the current SI cycle.

The first step in completing the SI is to assess prior goals brought into the SI cycle from the past two Program Reviews (the 2019-2020 Program Review Progress Report and the full 2018-2019 Program Review).

After logging into eLumen and selecting your role and program from the top drop-down menus, click the Strategic Planning tab and then the Initiatives tab. Scrolling down you can see last year’s 2019-2020 Program Review Progress Report, the full Program Review from 2018-2019, and the current cycle’s 2020-2021 Program Review Progress Report.

Click on the link to the 2020-2021 Program Review Progress Report to open the official program review in eLumen where the program’s responses and reflections will be recorded.

The Primary Contact Table in the first section of the SI will already list collaborators on the Program Review because of the work completed in Step 2 of 3 of the training. If not, please go back to that document (Adding Collaborators and Goals) for help with adding collaborators.

Scrolling to the next section of the SI, Goals and Objectives (Prior), we can now assess the prior goals that were brought into the current Program Review.
Click the **Goal** (flag) icon on the Goals and Objectives (Prior) – Progress and Action Plans header.

![Goals and Objectives](image)

Then, in the rubric that opens in the pop-up window, **click the cell** to indicate progress on each prior goal as appropriate.

![Link Goals and Objectives](image)

If the rubric does not look like the **Multiple Benchmark Rubric** in the picture above, please go back to the document **Step 2 of 3 – Adding Collaborators and Goals** for help changing the rubric.

Once all prior goals have been assessed in the rubric, **but before clicking Save**, we next align action plans with any goals not marked as “Met” in this same window. This is where any Resource Requests will be added to the Program Review.

**Aligning Actions to Goals (Prior) and Adding Resource Requests**

**The next step in completing the SI is to align action plans and add resource requests,** if needed, to any prior goals that have not been marked as “Met.” Again, this is done in the pop-up window from the previous step where progress on goals was indicated via the rubric.

Under the goal, click the **+ Align Action** box to add an Action Plan.
When the new Align Action window pops open, click the **Create New Action** button.

![Create New Action button]

Then, underneath that, provide the **Recommended Action** description, select an **Action Type**, and **Link SLOs**.

![Recommended Action and Action Type fields]

If resources are needed to close the loop on the goal, click the **+ Add a Resource Request** button after linking SLOs to that goal.

![Add a Resource Request button]

In the additional spaces that open once that button is clicked, provide the **Resource Name** description, select a **Resource Type**, and give the dollar **Amount** for the resource request.

![Resource Name, Type, and Amount fields]

Note that resource requests are for funding beyond the program’s baseline budget. Outside of Program Review, programs will also need to submit resource requests through BRAC’s process.

When finished click the **blue Add New Action** button.
The window will close, and the **Recommended Actions** will appear in the space below the goal, with a visual indication of the number of SLOs and Resource Requests linked to that goal.

Recommended Actions that are not aligned to any goals can also be added to this SI section. To add these types of actions, select the **+ Link Unaligned Recommended Action** at the bottom of the Link Goals and Objectives window. Follow the same steps as above to complete the Action Item description and to link SLOs and identify any resource requests.

When all Goals have been assessed, and any Action Plans and Resource Requests have been entered, click the **blue Save** button.

**Assessing Goals (New)**

The third step in completing the SI is to assess the new goal(s) brought into the SI cycle for this 2020-2021 Program Review Progress Report.

Scrolling down to almost the end of the Goals and Objectives section, click the **Goal** (flag) icon on the **Goals and Objectives (New) – Action Plans** header.
Then, in the rubric that opens in the pop-up window, click the cell to indicate progress, if any, on the new goal(s).

![Rubric Example]

If the rubric does not look like the Multiple Benchmark Rubric in the picture above, please go back to the document Step 2 of 3 – Adding Collaborators and Goals for help changing the rubric.

Once the new goal(s) has been assessed in the rubric, but before clicking Save, we next need to align action plans with this goal(s). This is again where any Resource Requests will be added to the Program Review.

### Aligning Actions to Goals (New) and Adding Resource Requests

The fourth step in completing the SI is to align action plans and add resource requests, if needed, to the new goal(s). Again, this is done in the pop-up window from the previous step where progress on the new goal(s) was indicated via the rubric.

Under the goal, click the + Align Action box to add an Action Plan.

![Align Action Example]

When the new Align Action window pops open, click the Create New Action button.
Then, underneath that, describe the **Recommended Action**, select an **Action Type**, and **Link SLOs**.

If resources are needed to meet the goal, click the **+ Add a Resource Request** button.

In the additional spaces that open once that button is clicked, provide the **Resource Name** description, select a **Resource Type**, and give the dollar **Amount** for the resource request.

When finished click the **blue Add New Action** button.

The window will close, and the **Recommended Actions** will appear in the space below the goal, with a visual indication of the number of SLOs and Resource Requests linked to that goal.
When the new goal(s) has been assessed, and any Action Plans and Resource Requests have been entered, click the blue **Save** button.

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### Strategic Initiative Cycle: Answering the Strategic Initiative Questions

#### Questions in the Strategic Initiative

The above steps show programs how to assess their prior and new goals for the Program Review and how to add action plans and resource requests to those goals. Note that, in the same section on Goals and Objectives, there are also reflection and discussion questions for programs to answer as part of the Program Review.

From there, the SI moves on to the section covering Student Learning Outcomes and its own set of reflection questions. After that is the section on Eliminating the Equity Gap, followed by the Conclusions section. Every section in the SI has its own set of questions for programs to reflect on and discuss.

#### Entering Responses and Reflections

**Text Boxes**

The SI provides text boxes for programs to answer the reflection and discussion questions in the Program Review. If you would like to format the text within eLumen, you can use the basic editing controls that appear at the top of each text box. You may also choose to copy-and-paste your answers to these questions from a text file or Word document but keep in mind that, while you can copy-and-paste text, you are unable to do so with images. Instead, save the image and upload it to the server using the Folder icon in the editor. Then use the image icon to select the image you want to insert. This will ensure the image does not break or cause the report to not run.

Please be sure to enter information into EACH text box, even if you have nothing to add. For example, if your program does not have curriculum, then enter N/A for any curriculum questions.
Tables

Some sections in the SI may have tables for the program to complete, like the Primary Contact Table. Select the cell in the table to add the data or requested information. A new row in the table will automatically be created as the responses are typed in.

Saving Your Work

If you plan on working on the SI over several sessions, you may select Save Draft to save your work on each section. You may also select Save All as Draft to save all the work you’ve entered for all the different sections at once. When the SI is finished, the program can decide which Version of the drafts to then publish for that section.

Navigating the SI Layout

Once in the SI, the title and type of SI template are listed on the left side of the header. For the current SI cycle, it should say “2020-2021 Program Review Progress Report.” On the right side of the SI header, there are options for viewing instructions, downloading the report as HTML, and reminders of the current cycle’s due dates.

Below the SI header, there are selectors available for jumping to specific Sections of the template, or for viewing previous Versions, including Milestones. Select the Sections drop-down menu to expand the options.

The SI template begins below the Section and Version toolbar. The grey bars indicate Regions, with the blue bars indicating Sections within that Region. Sections are the areas that are completed by the Program/Department Coordinator and Collaborators. Use the rich text editor to complete the Sections as appropriate.

To view the individuals who can collaborate on a given Section, select the Person Icon on the right side of the blue bar.

The Sections will indicate when there are unsaved changes. When viewing a specific Milestone, the Section will also indicate whether there is a saved response for the given Milestone.

Use Save Draft to keep the work you have completed in that Section. Use Save All as Draft to keep the work completed in all Sections of the SI. When a draft is ready to be shared with all users on the Strategic Initiative and printed in a Strategic Initiative Report, the program’s Administrator can select Publish All for the SI.
Strategic Initiative Cycle: Submitting the Strategic Initiative

The final section of the SI is for “Administrator Review and Signature.” When the program is done completing the Program Review, the Program Coordinator will select Save All as Draft and notify the program’s Administrator that the SI is ready to be reviewed. This is to be done no later than November 3, 2021, for the 2020-2021 Program Review Progress Report.

The Administrator will then, over the next two weeks, review the program’s submission and, if needed, go back to the Program Coordinator with any notes, suggestions, comments, etc. After the content has been discussed and the program has been given the opportunity to review and/or revise any responses, the Program Coordinator will select Save All as Draft one more time.

Once the final version of the program’s SI is ready, the Administrator will enter their name and title, add any final notes or comments, and then select Save All as Draft one last time. To officially submit the Program Review, the Administrator will then select Publish All. The publishing of the SI is to be done no later than November 18, 2021.

If the program would like to respond or comment on any of the Administrator’s final feedback in the SI, there is space provided for this at the very end of the section. The program will then need to select Publish All once again.

Step 3 of 3 is now complete. Congratulations on completing the 2020-2021 Program Review Progress Report!