

How to Complete Annual Reports in Anthology Planning

***Note:** Any program, department, college, or office is referenced as a “unit” in these instructions.

Logging In: Enter <https://uncc.campuslabs.com/planning/> and choose “Planning.” If prompted, enter your NinerNET Credentials. After authentication, your Dashboard should appear on the page.

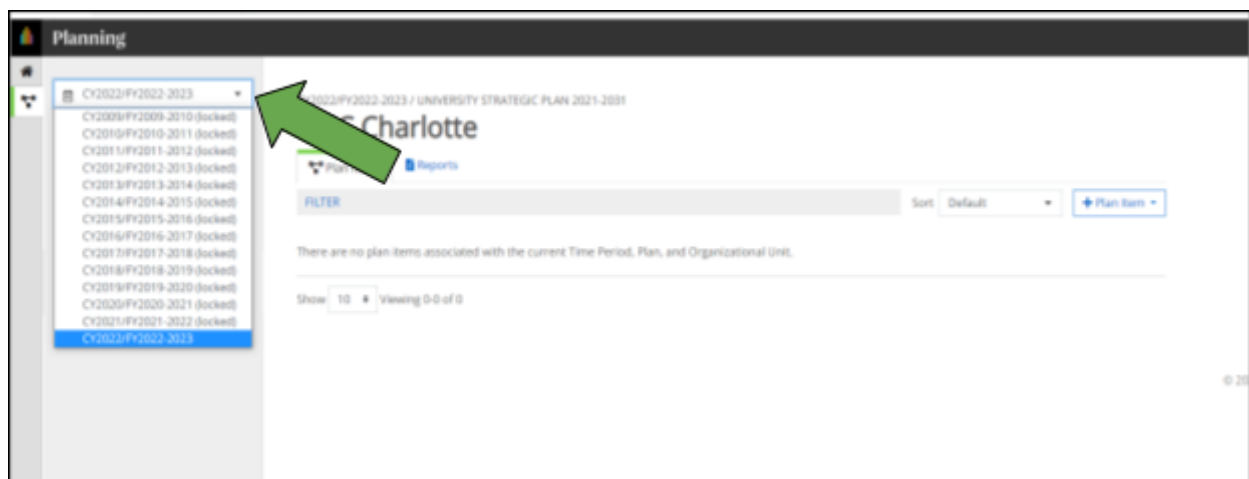
1. Click on  the Plans icon to get started.

See example below.



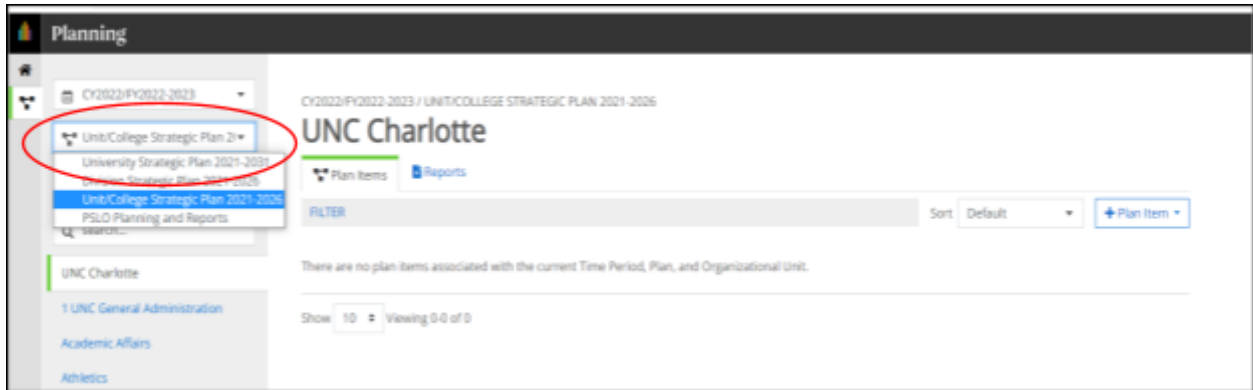
2. Check the left-side panel for the year. If the correct year is not displayed, click the drop-down arrow and change to the appropriate reporting year.

All data is organized by calendar/fiscal year for reporting purposes. If your area operates on a calendar_year, “CY” indicates the year for which to enter data. If your area operates on a fiscal year, “FY” indicates the year in which data is entered. The example below indicates CY2022/FY2022-2023.



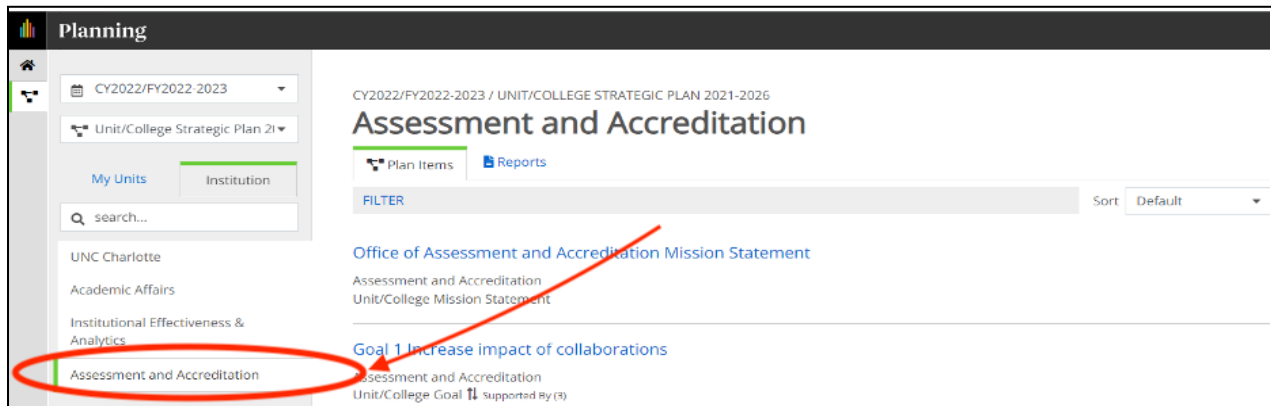
3. In that same panel but on the next row, select the appropriate unit level.

If you are updating a college plan, choose “College/Unit Strategic Plan” from the drop down tab. If you are updating a division plan, select “Division Strategic Plan.”



4. From the organization tree on the left panel, click on the College or Division to expand the tree and then select your unit.

In this example, Academic Affairs was chosen; then, Assessment and Accreditation is selected.



5. To create the report, click the Add Plan Item button on the right side of the page. Then, from the drop-down menu options, choose “Unit/College Annual Report (Highlights).”

Assessment and Accreditation

Plan Items Reports Documents

FILTER Sort Default + Plan Item

Unit/College Mission Statement
Unit/College Goal
Unit/College Objective
Unit/College Annual Report (Highlights)
Exceptional Data-informed Change
Graduation Metrics Plan
Diversity Initiatives

Office of Assessment and Accreditation Mission Statement
Assessment and Accreditation
Unit/College Mission Statement

Goal 1 Increase impact of collaborations
Assessment and Accreditation
Unit/College Goal Supported By (3)

Goal 2 Improve quality of practice
Assessment and Accreditation

You should now be on the Editing page for the Annual Report. You will see “Edit Plan Item” across the top of the page.

6. Type in the name of the unit for which you are entering a report.

In this example, we typed: Assessment and Accreditation.

CY2022/FY2022-2023 / UNIT/COLLEGE STRATEGIC PLAN 2021-2026

Edit Plan Item

Template: Unit/College Annual Report (Highlights)

Name of College/Program/Department *
Enter the name of the department/college/program.

Assessment and Accreditation Annual Report (Highlights)

Start *
07/01/2022

End *
06/30/2023

Note: The Start and End Date will appear automatically. Do not change the start and end dates.

7. Provide the highlights in the appropriate text boxes.

- If your unit is NOT in Academic Affairs, enter the narrative for your Annual Report in the text box labeled “NON-ACADEMIC AFFAIRS UNITS ONLY: Highlights of the Year.” Then, skip to Step 10 in these instructions.
- If you are a unit within Academic Affairs, ignore this first box and proceed to the next text box.

8. Academic Affairs (AA) Units: Enter the Annual Report narrative in each of the text boxes as they relate to the four themes in the strategic plan. There are separate boxes for each theme.

Below, “Highlights Related to AA Theme A” is shown. As you enter data, be concise. Feel free to use bulleted lists for clarity and brevity.

ACADEMIC AFFAIRS UNITS: THEME A - EDUCATIONAL OPPORTUNITIES AND EXCELLENCE

Describe major accomplishments related to AA Theme A: Transform students' lives through educational opportunities and excellence.

File	Edit	View	Insert	Format	Tools	Table
↶	↷	Paragraph	▼	B	<i>I</i>	≡ ≡ ≡ ≡ ...
P						

Plan Item Files + File + Folder

There are no attachments.

9. Academic Affairs Units: Indicate the Types of Accomplishments for each narrative section, by clicking in the respective box(es). Multiple types may be selected.

Each narrative is accompanied by a menu of related types of accomplishments. Checkbox reporting facilitates institutional-level reporting. It also guides you in determining where to report information.

Types of Accomplishments Discussed Above:

Select the types of accomplishments discussed in the text box above. Select all which apply.

- Undergraduate Student Success (high impact practices, mentoring)
- QEP Support
- Co-Curricular Learning
- Student Retention and Graduation (enrollment rates, retention rates, graduation rates, Student Experience Project, OER use, etc.)
- Student Career Preparation (co-ops, internships, service learning, research, engagement with alumni and leaders, etc.)
- International Experiences (study abroad, on-campus global learning programs/events)
- Graduate student and postdoc support (mentoring, research, training, and professional development)

10. In the text box for “Examples of Data-Based Improvements,” provide examples of improvements you made based on your use of assessment data. Be sure to indicate the data source.

Examples of Data-Based Improvements
Describe your use of assessment data for the purpose of improvement.

File	Edit	View	Insert	Format	Tools	Table								
↶	↷	Paragraph	▼	B	<i>I</i>	☰ ☱ ☲ ☳	☰ ☱ ☲ ☳	☰ ☱ ☲ ☳	☰ ☱ ☲ ☳	☰ ☱ ☲ ☳	☰ ☱ ☲ ☳	☰ ☱ ☲ ☳	☰ ☱ ☲ ☳	☰ ☱ ☲ ☳
p														

11. OPTIONAL: Complete the “Other Major Accomplishments” section if you would like to report activities and accomplishments not covered by one of the themes.

12. In the text box for “Diversity Initiatives,” describe relevant diversity and inclusion activities and accomplishments.

Diversity Initiatives
Describe programs and activities related to diversity, access, and inclusion. Examples include presentations, workshops, trainings, cultural programs, exhibitions, films, or speakers that address aspects of diversity; recruitment and retention initiatives, and activities that promote diversity through community engagement.

File	Edit	View	Insert	Format	Tools	Table								
↶	↷	Paragraph	▼	B	<i>I</i>	☰ ☱ ☲ ☳	☰ ☱ ☲ ☳	☰ ☱ ☲ ☳	☰ ☱ ☲ ☳	☰ ☱ ☲ ☳	☰ ☱ ☲ ☳	☰ ☱ ☲ ☳	☰ ☱ ☲ ☳	☰ ☱ ☲ ☳
p														

13. Select the blue “Done” button to save your report. When you do so, your changes will be automatically saved, and you will be returned to the main page of your plan.
Be careful not to click the “Delete” button. If you delete the plan, it will be permanently removed from the system.

Additional Information:

You may attach supporting documentation in plan (e.g. press releases, data files, dashboards, etc.). Click the **+File** button to attach the files from your computer (Word, PDF, Excel are all acceptable formats).

You may separate your documents into folders, by clicking the **+Folder** button to add a folder (see below).

Supporting Documentation

This area is for attachment of various files that support the objective. Word documents, PDFs, Excel spreadsheets, and Power Point Presentations are all acceptable formats.

Linked Documents + Linked Document

There are no attachments.

Plan Item Files + File + Folder

There are no attachments.

Baseline

OPTIONAL: Link to a Baseline Project to attach a PDF of the survey results directly to this objective record.

File Edit View Insert Format Tools Table

↶ ↷ Paragraph ▾ **B** *I* [List Icons] [List Icons] [List Icons] [List Icons]

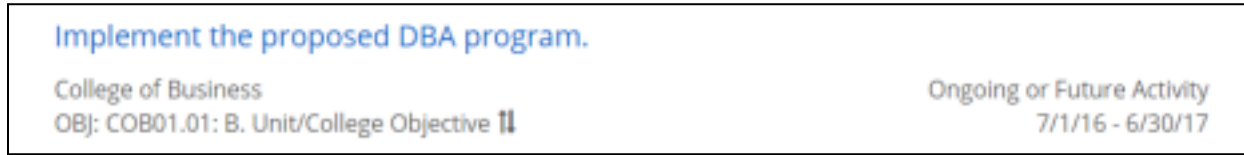
p

+ Baseline

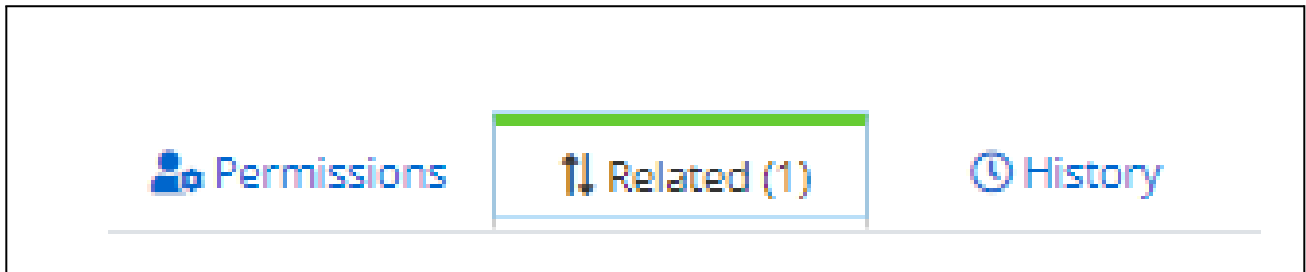
No Data Sources have been added.

How to Relate Objectives to Goals

1. Go to your plans page. Select the objective by clicking on the blue text.



2. When the objective screen appears click the “Related” tab on the right.



3. Click “Supports” (Connected Up) to relate the objective to the appropriate goal.



4. When the “Select Supports (Related Up) Item Screen” appears, click the appropriate **organization unit and select the appropriate goal by clicking the plus sign.** For this example, the Academic Affairs goal was selected.

Note: You will have to select Division Strategic Plan from the drop-down menu to relate to Division Goals.

Select a Supports (Related UP) Item

CY2022/FY2022-2023

Unit/College Strategic Plan 2021-2022

search...


UNC Charlotte

Academic Affairs


Institutional Effectiveness & Analytics

Assessment and Accreditation


FILTER

Office of Assessment and Accreditation Mission Statement 

Assessment and Accreditation
Unit/College Mission Statement 7/1/22 - 6/30/23

Goal 1 Increase impact of collaborations 


Assessment and Accreditation
Unit/College Goal 7/1/22 - 6/30/23

Goal 2 Improve quality of practice 

Assessment and Accreditation
Unit/College Goal 7/1/22 - 6/30/23

Show 10 Viewing 1-3 of 3

5. The green **check mark** indicates that you have now related an objective to a goal.

Goal 1 Increase impact of collaborations 

Assessment and Accreditation
Unit/College Goal 7/1/22 - 6/30/23
