INSTRUCTIONS for PLANNING RECOMMENDATIONS in TracDat
Program Level

Background

TracDat by Nuventive is a web-based information collection, tracking, and reporting system used for managing outcomes assessments, program reviews, and planning recommendations. At El Camino College (ECC), TracDat has three main modules: 1) Student Learning Outcomes (SLOs); 2) Service Area Outcomes (SAOs); and 3) Program Review and Planning (PRP). Only the PRP module is covered by these instructions.

The PRP module houses Program Review reports and supports the Annual Planning process through Recommendations linked from Program Review to annual budget allocations. Linking program review, planning, and budgeting is critical to successful accreditation and institutional effectiveness.

This guide will lead you through the complete cycle of annual planning in the PRP module.

Logging into TracDat

ECC Home Page (*Google Chrome* has the best functionality with **TracDat**, as little items may not work with the other browsers, such as the drag-option to make text boxes larger.)

Once at the **ECC Home Page**, go to the **A-Z Index** at the top of the page and click on "**T**", then click on **TracDat**. You can also access TracDat by clicking here.

Log into **TracDat** with your regular college *Username* and *Password.*

At the top of the TracDat view at all times, there is a drop-down menu which lists all the units to which you have access. Click on the drop-down carrot and choose the unit you wish to open. The last unit you worked on will display the next time you log in.
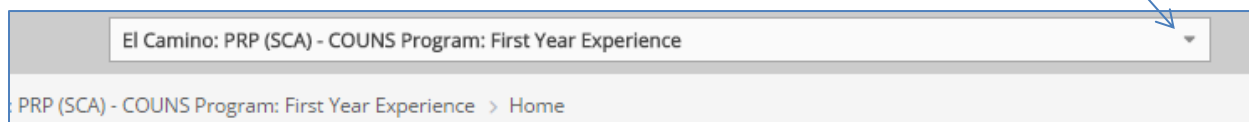
To work on *Program Review* and/or *Planning Recommendations*, choose the **PRP** module.

> **Help Text icon:** Throughout the software, you may click on the Help Text icon (the blue question mark) to the right of any box if you need a description of what kind of information is to be entered. These Help Text icons also offer tips and guidance, such as the proper formatting of Recommendation names.

Definitions:

"unit" vs. "Unit" – TracDat uses the word "unit" to refer to any program, unit or area-level section of any module, while "Unit" (capitalized) refers to a planning level used for divisions or programs that report directly to an Area. This guide sheet follows this convention.

For other definitions and an explanation of the annual planning process, please see Administrative Procedure 3250, Institutional Planning, section E, page 12.

Recommendations

Once you have selected the appropriate program for PRP, you will see the home screen.

If your browser window is smaller or on a mobile device, your view might look like this. Note the menu button (circled) where you can access the left-hand menu options by clicking.
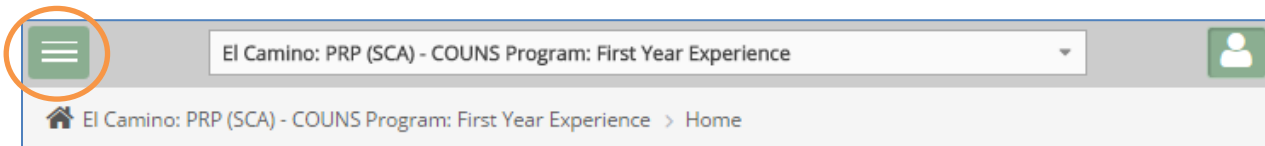
After selecting your program, it will always open at the Home screen (🏠 **Home**). If you ever get lost in TracDat, just "go Home" by clicking on the house icon.

TracDat Menu
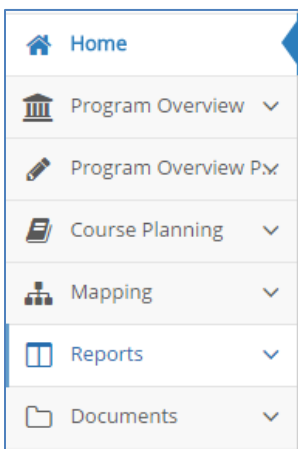
You can navigate to different functions in PRP by way of the TracDat menu.

The **Home** screen contains a summary of your program's PRP sections. COMPONENTS (DO NOT CHANGE) is where all sections (or "components" of the Program Review are located. This bar should always remain at the top. Entering Program Reviews into the Component boxes is discussed in separate guidelines. The Adjustments and Follow-Up links on the Home page are currently inactive in PRP. Development of the Annual Evaluations link is in progress and will be covered in next year's training.

Some views include the **Program Overview** menu with the building icon (🏛). This menu includes space for a general program description (optional), Assignments (currently not used), and Personnel. Click on the Personnel page to view all those who have access to the unit that you are in.

All views include the **Program Overview** Planning menu with the pencil (✏). This menu includes Recommendation Updates (in development), **Program Review & Planning**, and Annual Evaluations. You'll spend most of your time in TracDat interacting with the Program Review & Planning page.

Reports is where you can generate preset Standard or Ad Hoc reports. Depending on the report, you will be guided to either of these sub-links. You can generate reports of your Program Review or Annual Plan, or download an Excel version of your plan for local use.

Documents is where you can store any file that is related to your Program Review or Annual Plan. Save these to the **Document Repository**.

All of these processes are explained in this guide. **Course Planning** and **Mapping** are not used.

Adding New Recommendations

Each year, you'll have the opportunity to set goals to achieve and to request funding for these goals (if needed). Set annual goals in PRP by way of Recommendations in **Program Review & Planning**.

Click on ✏ **Program Overview** from the left menu, and then **Program Review & Planning**.
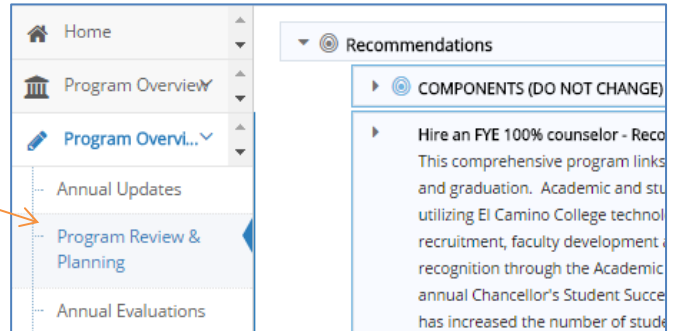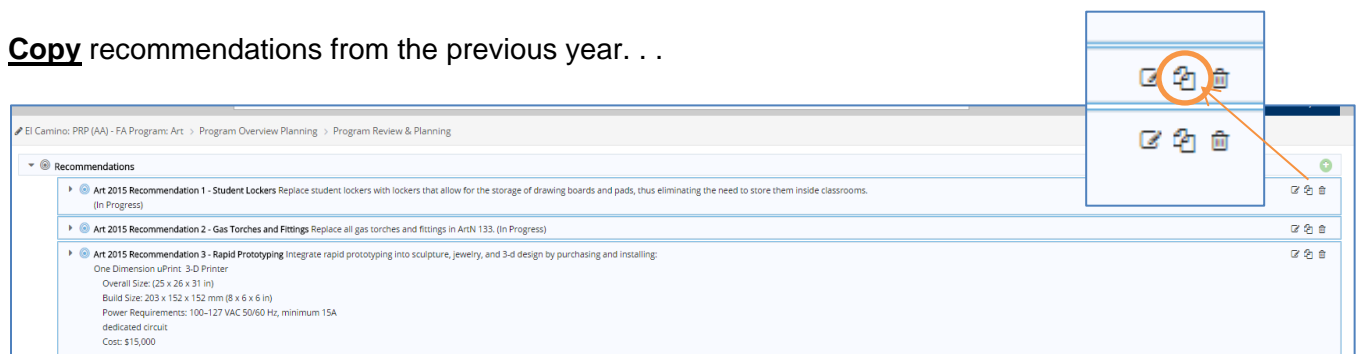

Click on the ➕ button to the far right of **Recommendations** to add a new goal.
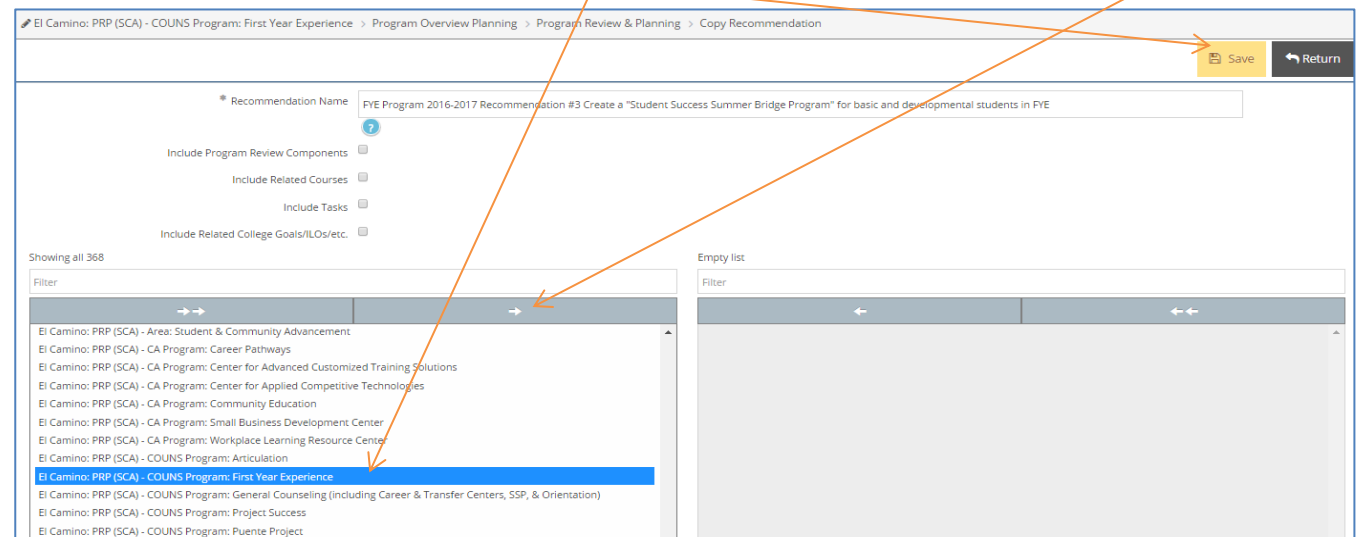

OR

Copy recommendations from the previous year. . .

 . . . And **Paste** into your list. Choose the program from the left-hand list and use the single arrow to move it over. **Save** and Return.

The copied recommendation will appear <u>at the bottom</u> of your recommendation list. To move the Recommendation up to the top, click and hold the Blue bull's eye (◎) to the left of the Recommendation and move it up or down.

Entering Recommendations

The following fields appear on the Add Recommendation or Edit Recommendation pages. An asterisk(*) by a field denotes that it is required.

Recommendation Name: <u>Use the following naming convention</u>

[Fiscal-Year] [Unit-Abbrev.] [Program-Name (if applicable)] "Rec" [Unique-Number]
Examples:
>   *2017-18 BCC HDEV Rec 1*
>   *2017-18 ITEC Administration of Justice Rec 1*
>   *2017-18 FINE Art Dance Rec 3*

<u>This is a change from previous practice</u>, effective for 2017-18. Clarity, consistency and brevity are key to the planning process as recommendations migrate up to the College Plan. (You do not need to modify older recs.)

AVOID Recommendation Names that:
- List the requested item as part of the Rec Name. Save this for the **Recommendation** box below.
- Include references to Program Review – this linkage will be handled in other ways
- Use lengthy phrases

Unit Abbrev examples:
• A&R	• FPS	• ITEC
• BSS	• GRANTS	• LLR
• BUSI	• HEAL	• MATH
• COUN	• HUMA	• NSCI
• FINE	• IRP	

For Program names, you may use either the course or program abbreviation (e.g., AJ or Administration of Justice, FYE or First Year Experience). See attachment for standard Program abbreviations.

Recommendation: Input the Recommendation text here (e.g., Hire full-time faculty in Painting/Drawing, or Purchase MS-Widget to support graduation efforts). Keep the content brief. Save details for the Rationale & Expected Outcome section.

Recommendation Status: Select the appropriate status. <u>Begin with **Not Started**</u>. Other options include Abandoned, Completed, In Progress/Funded, and Partially Completed.
- **Abandoned:** A previously-created Rec that is no longer needed
- **Completed:** A Rec has been fulfilled (e.g., purchased, hired, finished, etc)
- **In Progress/Funded:** A Rec that is currently moving forward to completion
- **Not Started:** A Rec that is proposed but has not been funded or started
- **Partially Completed:** A Rec that only received partial funding or was not fully completed in the current Implementation Timeline (fiscal year)

Implementation Timeline: Select the academic or fiscal year for anticipated/desired implementation of the Recommendation.

Input/Last Revised Date: Use the calendar feature to select the input date for the Recommendation. If a Recommendation is revised, select a date for the latest revision. Must precede the Completion Date.

Completion Date: Leave this field blank until the Recommendation is completed. Once the Recommendation is completed, use the calendar feature to select a completion date.

Origin or Type of Recommendation: Indicate whether the source of the recommendation is from a Program Review, is an Emerging Need, or Other. ***Note****: If "Program Review" is selected, you must link a PR component to the Recommendation (see below).*

Expense Category: Choose an expense category that most closely relates to your Recommendation. Select Other for Recommendations that need no funding or already have an external funding source.

Program Rank: Select the priority for this recommendation within the given expense category.

Rationale & Expected Outcome: Provide a BRIEF rationale for the Recommendation (e.g. "3 pending retirements necessitate hiring 3 new faculty"). Make clear the outcome of the Recommendation: How will you know when the Recommendation is achieved? What are the expected student or institutional outcomes as a result of implementing this Recommendation? Be specific so that completion of recommendation can be clearly assessed. Reference appropriate Program Review sections, where applicable. This section can be the basis of your future evaluation of the Recommendation.

Anticipated Cost: Input anticipated cost for this Recommendation. Use numbers only (e.g., 86000 or 86000.00), no commas. Enter 0 if there is no cost.

Primary SI Supporting Recommendation: Select the primary Strategic Initiative (SI) that supports this Recommendation.

Any impact on other Programs, Areas, or Units?: Does this Recommendation have any impact on other programs, areas, or units? Select 'Yes' or 'No'. If 'Yes', identify those impacted areas in the below text box. Exclude HR when Staffing is the Expense Category, as this is assumed.

List impacted areas and describe potential impact: If you answered 'Yes' to the above prompt, list any programs potentially impacted by this Recommendation and briefly describe potential impact.

Funding Status: Select the appropriate status for funding of this Recommendation. Begin with **Proposed**. Once the Recommendation is accepted into the Unit Plan, select Forwarded to Unit Plan. Keep the Funding Status updated throughout the annual planning process. If no funded is needed, select N/A.

Funding Type: Select the appropriate funding type for this Recommendation.

Complete **Annual Evaluation Date** and **Annual Evaluation** after the close of the year. Separate instructions will be provided to complete this portion.

Saving a Recommendation

After completing all necessary fields for your new recommendation, you must **Save** it. Click the gold **Save** button in the upper right corner before leaving the page. You may select the carrot on the Save button to either Save and Return to your list of Recommendations or Save and Add a New Recommendation. Click the **Return** button to go back to your Recommendations page. If you try to return without saving changes, the system will prompt you to confirm this. To go back and save your changes, click Cancel.
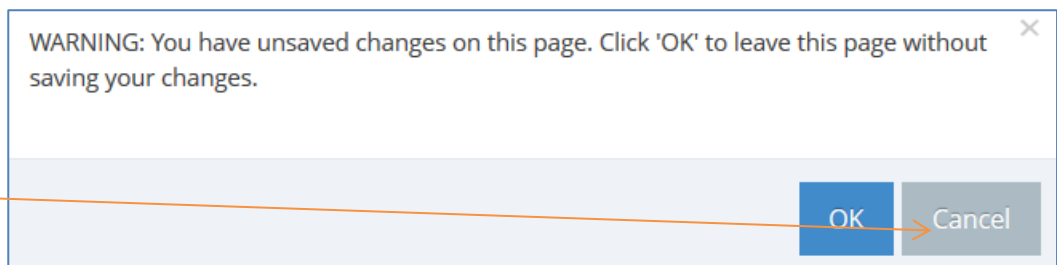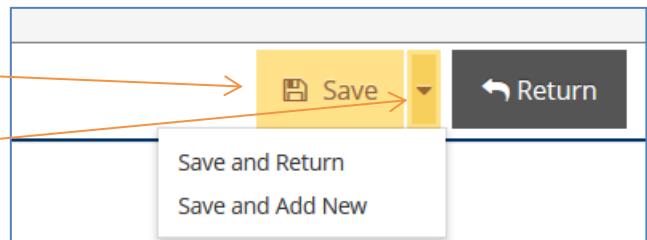
Linking a Program Review Component to a Recommendation

If the Origin of Recommendation is your Program Review, you will need to link the relevant component of your Program Review to the Recommendation using the following process.

FIRST, visit your Program Review document, either in TracDat or a separate document. **COPY** the relevant text that supports the need for your Recommendation. You need not copy lengthy content, just enough to support your Recommendation and show the linkage from Program Review.

Click the link under the Recommendations column on the Home Screen. This will "expand" the information you can see. If you are on the Program Review & Planning page, click the carrot to the left of the Recommendation to expand. *Do not open or "Edit" the Recommendation.*

To link a Program Review Component, click on the ⊕ button to the right.
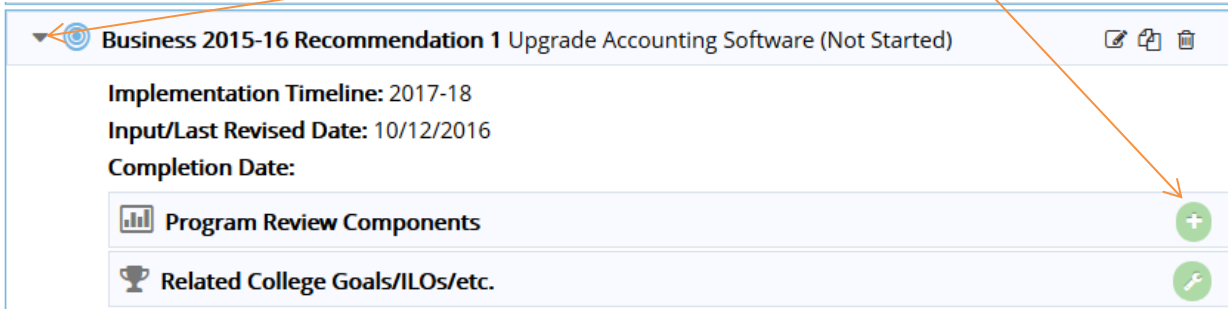
This opens the Add Program Review Component dialog box. Select the appropriate Category by clicking the drop-down list.
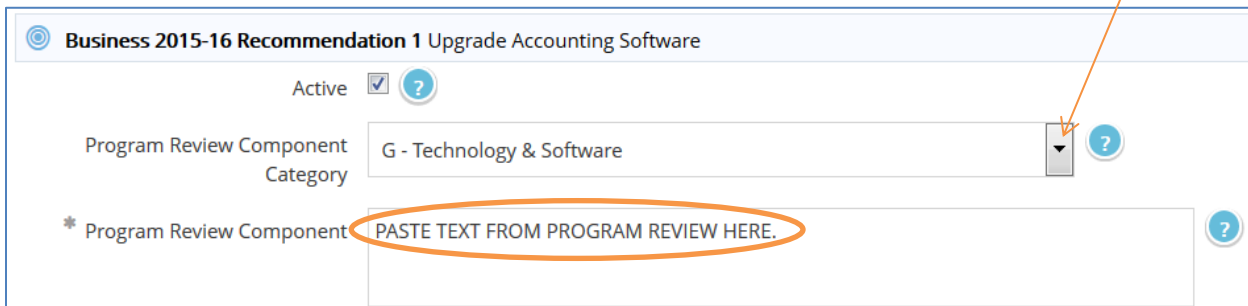
Then **PASTE** the relevant text from program review into the 'Component' field (see above). Details and Notes are not used.

When each Component field is complete, click 'Save'. Then click 'Return' to go back to the Recommendation and Components. This field does not currently support rich text formatting (bold, italics, hyperlinks, etc.) or graphs/tables. Use the 'Relate Documents' button (🔧) to attach any supporting documentation with graphs, tables, etc. The supporting program review component is now linked to your recommendation and will print along with the Rec in standard reports.
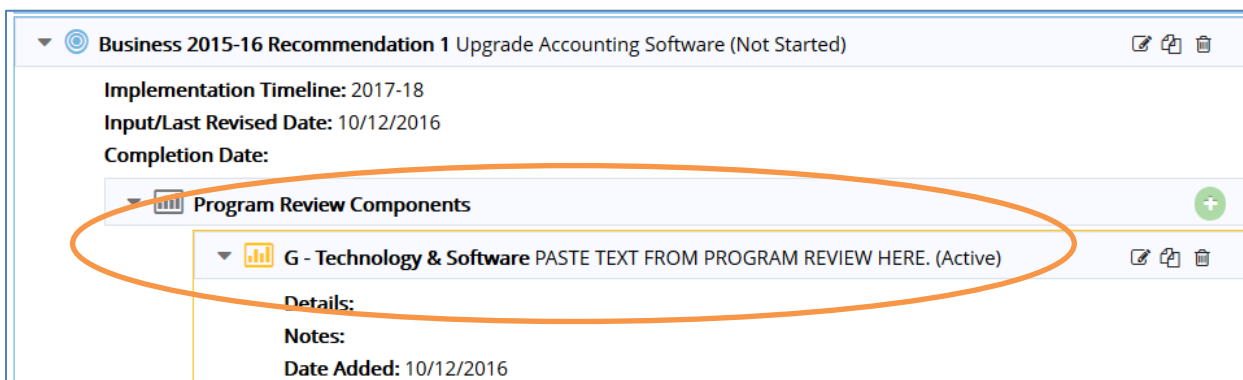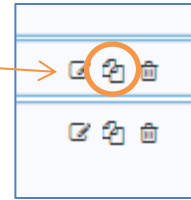
Editing or Updating a Recommendation

Throughout the annual planning process, you will need to update aspects of your Recommendations.

On the **Program Review & Planning** page, click on the **Edit button** to edit a previously-entered Recommendation.


You can edit any field at any time, as needed. The most common fields that you will need to edit (and when to modify them) are in the table below.

| Field	When to Modify
Recommendation Status	Any time during the planning year or implementation year
Input/Last Revised Date	Any time a status field is updated (Recommendation Status or Funding Status)
Funding Status	When the funding status is determined
Annual Evaluation	In July for the previous implementation year (e.g., July 2016 for 2015-16)
Evaluation Date	On the date the annual evaluation was entered

Before adding new plan information, update the existing recommendations: add in a completion date, annual evaluation information, and an annual evaluation date if applicable. Then archive the existing recommendations by going to **Reports/Standard Reports** in the left-hand navigation. Then select **Assessment: Program Review and Planning**.

.
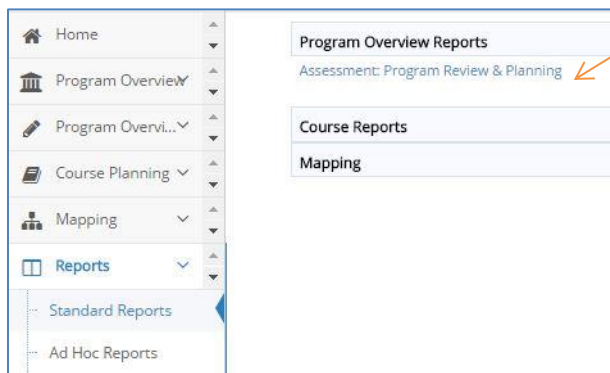
You will be given choices to name (include date in the name since it is an archive) and filter the report. Select "Abandoned, Completed, In Progress/Funded, and Partially Completed" and then click the triangle next to the **Open Report**.
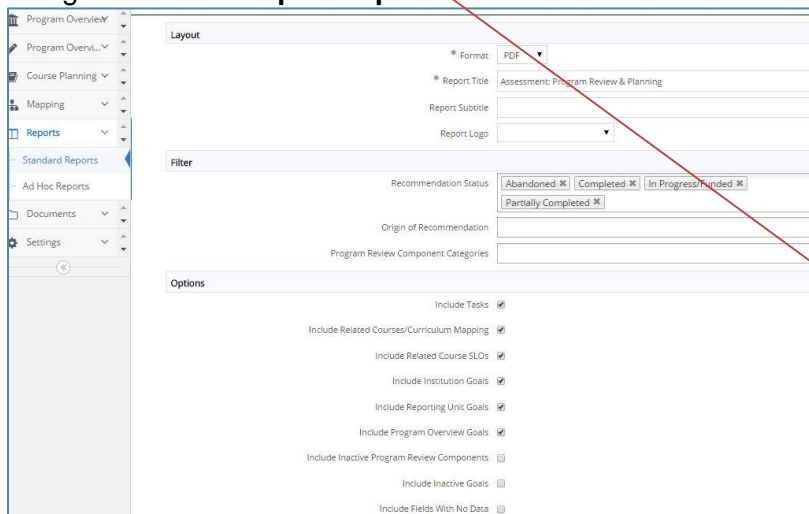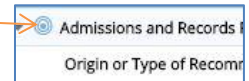

Save the report to the **Document Repository**.
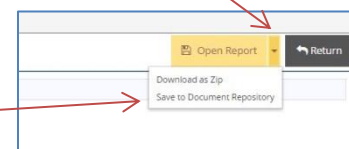
Once you have completed the archive of last year's recommendations, you are ready to add new recommendations. If you are carrying over an old recommendation into the new plan, choose the copy option described on the next page, and then save the copy with the new plan year and details. *By keeping the older recommendation on the current plan, you can demonstrate the history of the recommendation.*
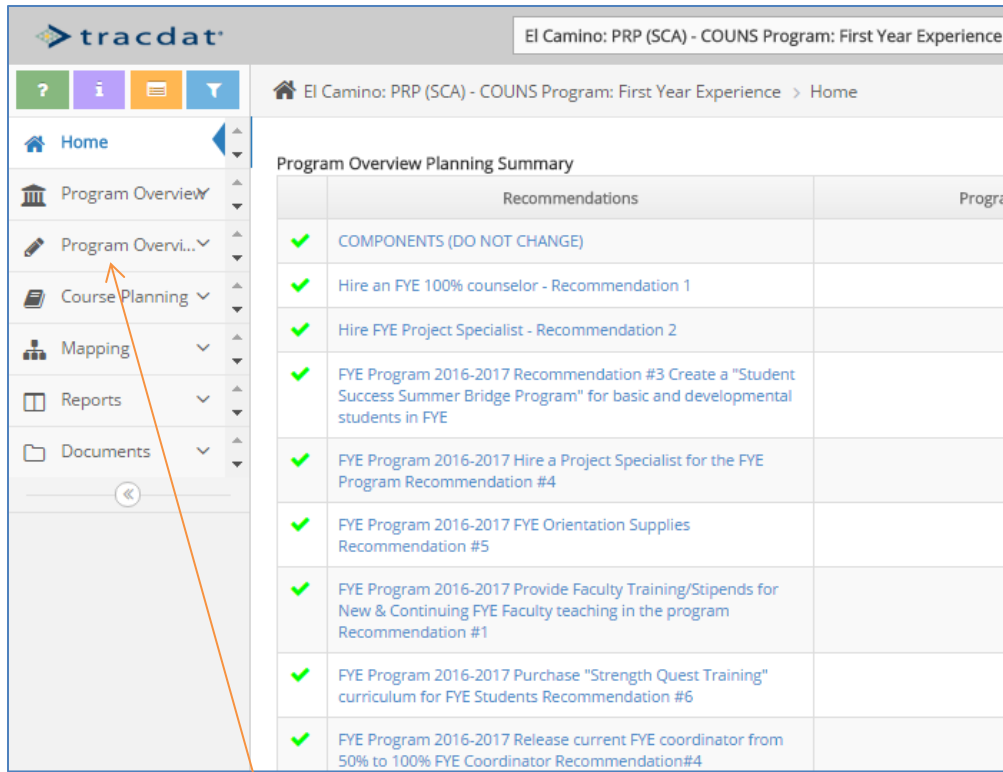
Go back into Program Overview (then Program Review and Planning) and you will be able to change the order of the recommendations, and complete any remaining fields.

To reorder the recommendations, click on the target to drag and drop the recommendation to a new order in the list.

Complete fields for each Recommendation.

Archiving Your Previous Annual Plan

In July, at the close of the implementation year ("Implementation Timeline"), you will need to go through the plan archiving process. This process involves the following steps:

1. Update the final Status of each Recommendation
2. Evaluate each Recommendation
3. Archive the Plan
4. Copying any Recommendations needed for future use
5. Deleting Recommendations from the active list (optional)

Evaluation of a completed Recommendation is critical for closing the loop and supporting the evaluation of program review for the next cycle of review. Your evaluation should answer the following questions:

- *Was it funded?*
- *Was it implemented? Partially or fully?*
- *What were you able to do as a result of the funding or implementation?* Be specific.
  - (e.g., month position was filled; when and where software was installed; action taken)
- *What outcomes are you able to measure as a result of implementation? Where the "Expected Outcomes" achieved?*
  - (e.g., additional sections added; maintained size of program to meet demand; able to provide sufficient stock of equipment/supplies for classrooms; able to increase services to students by providing a series of professional YouTube videos)
- (Optional) *What should be done differently to ensure institutional effectiveness?*
  - (e.g., The software overpowered the Wi-Fi resources of the classroom—need to enhance Wi-Fi for it to work properly or try a different product; few students are accessing the YouTubes so far—may need more advertising)

Start by referring back to your "Rationale & Expected Outcome" for each Recommendation to ensure that the evaluation is in sync with the Expected Outcomes.

Emphasis should be placed on how students or the college benefited, where applicable.

by generating a PDF and/or Excel report

Now that 2015-16 has drawn to a close, it's time to look back and report on how things went for all funded or approved items. The last stage of the annual planning process is to **Update, Evaluate and Archive your completed plan**. This ensures that we "close the loop," assess the impact of funded items on institutional improvement, and properly store the closing year's plan.

This is a simple 4-Step Process…deadline: July 31**.**

Step 1:
LOGIN to TracDat, select the **PRP** module, and **EDIT** (open) the Recommendation that was funded (see attached for guidance)

Step 2:
ADD your Evaluation (scroll to bottom of Rec).
- Update the Funding Status to Funded (if you haven't already).
- Add an Evaluation Date
- Evaluate the impact of the item being funded (e.g., program/services expanded, program/services could continue at same level, were able to do XYZ resulting in improved XYZ)

* Funding Status	Funded ▼ ?
* Funding Type	One-Time Funds Needed (Augmentation) ▼ ?
Annual Evaluation Date	07/12/2016 ?
Annual Evaluation	30 more students could be served by the Tech Center each day after the new widgets were installed.

Please be as specific with your outcomes as you can be (I know this will vary depending on the rec that was funded). If possible and appropriate, include any direct impact on students that was achieved as a result of the new funding or rec approval.

Finally, please make sure that the Rec Status and Funding Status of all recommendations have been updated before your final step:

Step 3:
ARCHIVE your 2016-17 Plan. (see attached for guidance)

Step 4:
DELETE the recommendations from 2016-17 ONLY.
- Once your plan is properly updated, evaluated, and archived, you can delete your recommendations to keep your main recommendations list page shorter/cleaner. Your recs are safely stored in your archived document.

Once you have completed your annual Program Plan, you will need to save a copy to the Document Repository. This step signals that your plan is complete and ready for consideration for your

Division/Department's Unit Plan. It replaces the "Submit" function of Plan Builder, the previous planning system.

Return to Reports, and select Ad Hoc Reports. Look for the PDF report format for the upcoming Plan Year (Implementation Timeline). Click the link to create the PDF report.

Ad Hoc Reports	Description
PROGRAM REVIEW AND PLANNING	
2015-16 PROGRAM RECOMMENDATIONS	PDF Format (02.10.2016)
2016-17 PROGRAM RECOMMENDATIONS	PDF Format (02.10.2016)

Once it has opened, save the document to a temporary location on your hard drive (e.g., Desktop). Click save.
Next, go to Document Repository, under Documents in TracDat, and click the green **+** button to the right of Document Repository to upload your new Unit Plan.
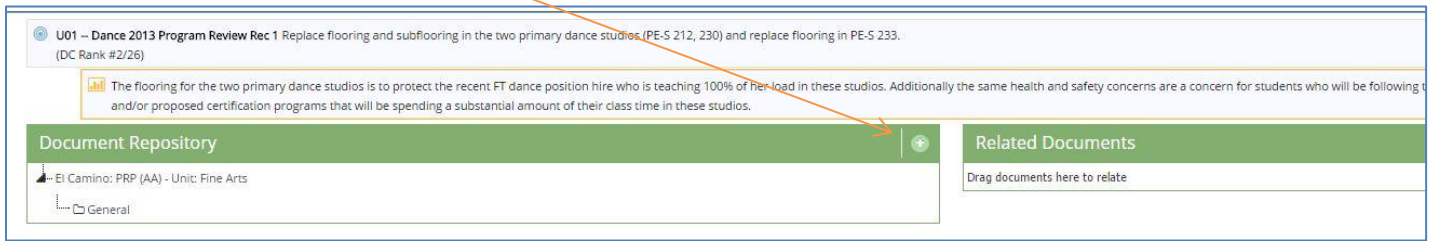

Click the grey-text "Click to browse for files" in the middle of popup box. Find and select your file and save under the General folder in TracDat. If you have saved previous copies, delete them or rename them DRAFT to distinguish your final plan. Your plan is now submitted!

HOW TO UPLOAD A RELATED DOCUMENT

You may wish to associate an external supporting document to a specific recommendation.

Under the associated recommendation, click the arrow to open up all fields below it.
Once it has opened, you will see another bar to add **Related Documents**. Click on the wrench icon to the right to add the document.

In the next window, click on the **+** button to the right of **Document Repository.**

A new window will open that says **click to browse for files** in the center.
Name the file and click on **save and relate**.

df