

Adding and Updating Annual Plans in SPIMS

Step 1: Sign on to SPIMS through this [link](#) or from SPIMS Home Page

Step 2: Landing page for SPIMS is the “Goals” page. Click on “Goals” on SPIMS Tool Bar if already logged in.

Step 3: Goals page will display only those Goals in units and subunits assigned to you. Goals ready for Annual Plans to be added will appear under the heading “Click on Goal Title to view details and update progress” (see *Screenshot #1*). Goals with risks still needing to be defined (if any) will appear in a separate table below this.

Note: Goals must be approved (Status = Approved) and reviewed (Reviewed? = Y) before adding an Annual Plan. Goals appearing in the Pending Goals page are not available to have Annual Plans added.

Goals

Click on Goal Title to view details and update progress. Use the search to find others.
System admins can modify approved goals by clicking on the status.

Show entries Search:

Number↑	Goal Title	Theme	School/Area	Department	Status	Reviewed?
15	Identify and Implement Institutional Learning Outc	Student Growth and Success	Office of the Provost	All Units	Approved	Y

Screenshot #1

Step 4: Click on Goal Title to display goal details. Selected Goal will appear in edit format, except that data previously entered will be displayed in a fixed format (see *screenshot #2*).

Goal Details & Progress Update

Screenshot #2

Goal Information:

Theme 2: Student Growth and Success

Objective UMB will design and implement collaborative, inclusive, respectful, and accessible academic learning environments that equitably support and develop students to become exemplary professionals and purposeful contributors to society.

Outcome 4: UMB engages students and fosters their passions and skills to prepare them for meaningful self-reflection and ethical careers in alignment with University’s Core Values.

School/Organization Office of the Provost

Department All Units

Goal Number 15

Goal Title Identify and Implement Institutional Learning Outcomes for All Students

Goal Description Through collaborative efforts involving all of the schools, the Office of the Provost will coordinate the identification and implementation of Institutional Learning Outcomes for all students drawn from the existing curricula.

Progress Measurement Criteria Articulation of Institutional Learning Outcomes. Assessment of Institutional Learning Outcomes.

Step 5: Further down in the Goal detail, click on [Add Annual Plan](#) (see Screenshot #3). The Add Annual Plan page will appear (see Screenshot #4).

Annual Plan(s): **SS #3**

[Add Annual Plan](#)
There are currently no annual plans for this goal.

Risks:

[Update Risk\(s\) currently associated with the goal.](#)

[Risk re-evaluation](#)
There are currently no additional risks for this goal.

Progress Updates:

[Add Progress Update](#)

SPIMS Access Request Add Goal Pending Goals Goals Reports Search Admin Menu ▾

Add Annual Plan **Screenshot #4**

Step 6: Entry form for Annual Plan Information has 3 required and 2 optional fields and the option to attach a Supporting Document (see Screenshot #5). Enter desired information.

Annual Plan Information: **Screenshot #5**

Year Range Required

Annual Plan Title Required

Activities Planned Required

Who is Responsible for the Annual Plan? Optional

End of Plan Evaluation Optional

Supporting Document(s) No file chosen
Optional - Word, Excel, PowerPoint, PDF, JPG or GIF only

Annual Plan Information

Year Range – Select Fiscal Year range for Annual Plan from dates listed - Required

Note: The initial Annual Plan range for the 2022 – 2026 Strategic Plan is 2022 – 2023. Be careful when selecting the fiscal year range, as any available range can be selected.

Annual Plan Title (50 characters maximum) - Required

Activities Planned (1000 characters maximum) - Required

Who is Responsible for the Annual Plan? (200 characters maximum) - Optional

End of Plan Evaluation (4000 characters maximum) – Optional

Note: End of Plan Evaluation field will be used during the plan year to document actual activities conducted and can serve as the basis for the bi-annual strategic plan progress update. This field should be left blank when the annual plan is first created, unless there is initial activity already completed that could be documented.

Supporting Document – Attach one file of the following type only: Word, Excel, PowerPoint, PDF, JPG or GIF – Optional

Step 7: An example of a completed Annual Plan is shown in Screenshot #6. Click [Submit](#) when done.

Annual Plan Information: Screenshot #6

Year Range	<input type="text" value="2022-2023"/>
	<small>Required</small>
Annual Plan Title	<input type="text" value="Development of Institutional Learning Outcomes"/>
	<small>Required</small>
Activities Planned	<input type="text" value="The Best Practices in Assessment Group and associated Workgroups will continue to meet as necessary to finalize the development of ILOs with the goal of submitting these to the Provost no later than August 1, 2022. There are six ILOs under development"/>
	<small>Required</small>
Who is Responsible for the Annual Plan?	<input type="text" value="Best Practices in Assessment Group as convened by staff of the Institutional Effectiveness, Strategic Planning, and Assessment Office"/>
	<small>Optional</small>
End of Plan Evaluation	<input type="text"/>
	<small>Optional</small>
Supporting Document(s)	<input type="button" value="Choose File"/> BPAG Asses...y 3 2022.pptx
	<small>Optional - Word, Excel, PowerPoint, PDF, JPG or GIF only</small>

Step 8: Goal detail will now show summary details of completed Annual Plan (see Screenshot #7). To view full annual plan details in a printable format, click on the plan Title. To view the attached document, click [Download](#).

Annual Plan Review: Annual plans created by a Contributor will have a status designation of “Pending” and an email notification is sent to the Administrator notifying them that an Annual Plan is available for review. Once reviewed, the Administrator should change the status to “Reviewed” using the radio button. Annual plans created by an Administrator will have a status designation of “Reviewed”.

Note: Completed plans will have the option to [Delete](#). This should only be done if a plan is accidentally created. Otherwise, the update option can be used to change any content and substitute a different file attachment. At some point during or after the Annual Plan year the ability to delete plans from that year will be suspended to preserve strategic plan documentation.

Annual Plan(s):

[Add Annual Plan](#)

Click on the year range in order to update the annual plan. To see full annual plan details, click on the title.

Screenshot #7

Year Range	Title	Activities Planned	Responsible	End of Plan Evaluation	Document	Status	
2022-2023	Development of Institutional Learning Outcomes	The Best Practices in Assessment Group and associated Workgroups will continue t...	Best Practices in Assessment Group as convened by staff of the Institutional Eff...		Download	Reviewed	Delete

Updating an Existing Annual Plan: Click on the Year Range to update the Annual Plan. The plan will be displayed in an interactive format (see Screenshot #8). The existing file attachment can be viewed by clicking [Download](#), and a different file attachment can be substituted if desired. Click [Submit](#) when done.

Annual Plan Information:

Year Range: Required

Annual Plan Title: Required

Activities Planned: Required

Who is Responsible for the Annual Plan?: Optional

End of Plan Evaluation: Optional

Status: Pending Reviewed Required

Supporting Document: [Download](#) Required

Replace Supporting Document: No file chosen Optional - Word, Excel, PowerPoint, PDF, JPG or GIF only

Screenshot #8

Adding an Additional Annual Plan to the Same Goal (optional): Click Add Annual Plan to add another Annual Plan for the same Goal and follow Steps 6 and 7. You will have the option to create a new plan from scratch or to start with an existing plan and modify the contents (see *Screenshot #9*). Once additional plans are created, they will be displayed in order by time of creation with other existing plans (see *Screenshot #10*). Plans can also be created for future year ranges. If plans for future time periods are created, they will be displayed in order by time period (see *Screenshot #11*).

Add Annual Plan

Screenshot #9

Create a [new annual plan from scratch](#) or select an existing annual plan below that you want to copy/continue.

Year Range	Title	Activities Planned	Responsible	End of Plan Evaluation	Status
2022-2023	Development of Institutional Learning Outcomes	The Best Practices in Assessment Group and associated Workgroups will continue t...	Best Practices in Assessment Group as convened by staff of the Institutional Eff...		Reviewed

Annual Plan(s):

Screenshot #10

[Add Annual Plan](#)

Click on the year range in order to update the annual plan. To see full annual plan details, click on the title.

Year Range	Title	Activities Planned	Responsible	End of Plan Evaluation	Document	Status	
2022-2023	Submission of Institutional Learning Outcomes	The Best Practices in Assessment Group and associated Workgroups will finalize a...	Best Practices in Assessment Group as convened by staff of the Institutional Eff...	Target Date August 1, 2022	Download	Pending	Delete
2022-2023	Assessment of Institutional Learning Outcomes	The Best Practices in Assessment Group and associated Workgroups will develop th...	Best Practices in Assessment Group as convened by staff of the Institutional Eff...	Target Date December 31, 2022	Download	Pending	Delete
2022-2023	Evaluation of Institutional Learning Outcomes	The Best Practices in Assessment Group and associated Workgroups evaluate the su...	Best Practices in Assessment Group as convened by staff of the Institutional Eff...	Target Date July 31, 2023	Download	Pending	Delete

Annual Plan(s):

Screenshot #11

[Add Annual Plan](#)

Click on the year range in order to update the annual plan. To see full annual plan details, click on the title.

Year Range	Title	Activities Planned	Responsible	End of Plan Evaluation	Document	Status	
2022-2023	Development of Institutional Learning Outcomes	The Best Practices in Assessment Group and associated Workgroups will continue t...	Best Practices in Assessment Group as convened by staff of the Institutional Eff...		Download	Reviewed	Delete
2023-2024	Development of Institutional Learning Outcomes	ILOs were not finalized by June 30, 2023. The Best Practices in Assessment Grou...	Best Practices in Assessment Group as convened by staff of the Institutional Eff...		Download	Pending	Delete

SPIMS Guidance – Adding an Annual Plan

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