



UNIVERSITY of MARYLAND
BALTIMORE

UMB 2022 – 2026 Strategic Plan

Implementation Guidance

Progress Reporting – SPIMS Demo

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**UMB
STRATEGIC
PLAN**

— 2022-2026 —



Session Objectives

Review

Progress Reporting
Requirements

Demonstrate

Progress Reporting
in SPIMS

Update

Progress Reporting
Timeline



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SPIMS Progress Reporting Requirements



The Annual Implementation Plan (AIP)

- Required at the start of each fiscal year
 - Provide at least one activity to advance the goal to be completed by fiscal year-end
 - Identify activities to occur in FY23 [July 1, 2022 through June 30, 2023]
 - There are no limits to the number of initiatives or activities associated with a strategic goal that can be pursued during the year
- See IESPA *Resources* for guidance on creating the AIP (May 2022) at <https://www.umaryland.edu/iespa/strategic-planning/strategic-plan-implementation/>



SPIMS Requirements for Progress Reporting

- Goal Progress CANNOT be completed without a Goal AIP for FY23
 - If no activity is planned for FY23, *create* an AIP with the following statement:

“NO TASKS PLANNED FOR FY23”



The Risk Assessment Review

- Risk management review integrates with strategic plan reporting
- Managed by the Office of Enterprise Risk Management
- **Need an annual risk assessment before a Progress Report can be submitted**
- See guidance on completing the risk assessment review when asked to report at <https://www.umaryland.edu/iespa/strategic-planning/strategic-plan-implementation/>



Implementation Completion Phases in the SPIMS*

- Unit access rights to the SPIMS established;
- Unit enters aligned plans by Theme and Outcome into the SPIMS;
 - Unit Approver reviews goals and submits to IESPA for review
 - Each goal description in Primary Plan evaluated for SMART format (Note: M = recorded in separate field; T = Five [5] years)
- Unit determines risk assessment for each Strategic Goal in Plan for FY22;
- Unit enters FY23 AIP(s) for each Strategic Goal in SPIMS
- Unit reviews and updates, if necessary, risk assessment level for FY23
- **Unit updates progress through December 31, 2022**

*Strategic Plan Implementation Management System



Progress Reporting Components

- Components to complete
 - Progress Completion Update (%)
 - Progress /Status Explanation as of period end
 - Progress measurement update on quantitative metric(s)
 - Evidence, optional (one file upload)



Reporting Components Explained

- Progress Completion Update – Indications of Goal Progress
 - Not yet started (0%)
 - Preliminarily Underway (1%-24%)
 - Substantially Underway (25%-49%)
 - Significant Progress (50%-74%)
 - Nearing Completion (75%-99%)
 - Completed/Milestone Achieved (100%)
 - Progress not reported



Strategic SMART Goal

Unit: Center for Information Technology Services

Theme 4: Innovation and Reimagination

Outcome 2: UMB promotes the use of applicable new technologies and data-driven analytics, promoting student success, groundbreaking discoveries, employee productivity, and administrative effectiveness.

Goal: Expand and promote the UMB Data Analytics program to allow for the analysis of data within and across institutional data sources so it can help advance UMB reporting in such strategic areas as finance and resource allocation, student success, human resources, facilities and building maintenance, philanthropy, etc.



Strategic SMART Goal

Progress Measurement Criteria:

Assessment of reports used for decision-making. - Assessment of report utilization. - Number of reports generated within an institutional data source using data analytics. - Number of reports generated across institutional data sources using data analytics. - Number of reports using predictive analytics. - Number of summary reports showing key indicators in a contemporary presentation format, e.g., dashboard format. - Number of individuals trained and using the supported data analytics platform and tools.



Progress Reporting Requirements

- Status Explanation (for strategic goal) as of period close
 - Narrative response containing highlights of Period 1 or 2 progress.
 - Yes or no responses to milestone achievements are generally covered in the narrative response

Example progress narrative statement

“During 2022, the analytics unit expanded to provided reporting on student data, equity, diversity and inclusion (EDI), and Philanthropy. We hired additional personnel. EDI reporting is new in analytics, and now we are providing senior leadership with more information about their personnel, retention rates, hiring trends, etc.”



Progress Reporting Criteria

- Provide beginning value (quantitative) for this first report only.
 - Note: Data analysis will be conducted on this field in subsequent reports to indicate change.



Metric #*	Metric Description	Beginning Value	Value Type (\$, %, G)
1	Number of Reports Generated Using data analytics	200	G
2	Number of Reports using Predictive Analytics	0	G
3	Number of KPIs using dashboard format	0	G
4	Number of Users Trained	600	G

*IESPA Generated



Period-End Progress Update



Metric # *	Metric Description	Beginning Value	Period 1 Update	% Change *
1	Number of Reports Generated Using data analytics	200	220	10%
2	Number of Reports using Predictive Analytics	0	5	
3	Number of KPIs using dashboard format	0	12	
4	Number of Users Trained	600	650	

* IESPA-generated



Progress Reporting

Live SPIMS Demo



Strategic Plan Implementation Timeline and Deliverables



Implementation and Reporting

Periodic Campus Reporting:

- The Provost Office will provide updates (The UMB Dashboard) periodically
- Communicate successes and challenges to internal and external constituencies.



UMB Strategic Plan Implementation Timeline

Period 1: July 1, 2022 to December 31, 2022		Date
	SPIMS Opens for Period 1 Progress Reporting	12/1/2022*
	Semi-annual Progress Report due	1/15/2023
	Progress Reporting Period Closes	1/31/2023
Period 2: January 1, 2023 to June 30, 2023		
	SPIMS Opens for Progress Reporting	4/15/2023
	Year-end Progress Report Due	7/15/2023
	FY24 AIP Due	7/15/2023
	FY24 Risk Assessment Due	7/15/2023
	Progress Reporting Period Closes	7/31/2023

*Date revised



Q&A



For More Information

Office of Institutional Effectiveness, Strategic Planning, and Assessment

www.umaryland.edu/iespa

UMB 2022 – 2026 Strategic Plan

www.umaryland.edu/about-umb/strategic-plan

Enterprise Risk Management

<https://www.umaryland.edu/about-umb/offices/enterprise-risk-management/>