End--of-Year Tasks Reminder for JMU--STAR

1. Update Current Cycle Objectives with Accomplishments and Use of Results
2. Review/Update/Enter Next Cycle Objectives
3. Enter Annual Report Information
4. Submit Annual Report.

Access JMU--STAR and Log In

- From http://www.jmu.edu/jmuplans, click on the link for the **JMU-STAR Tool** (located on the Planning Links menu on the right and in the Resources box on the left.)
- Log in with your username (full JMU email address) and password.
    - Username is your full JMU email address
    - Your default password for training was your JMU e--ID (e.g. gracetm), but you may have changed this after training was over.

    Note: Your JMU--STAR password is not synced with your JMU eID and password; it will not change unless you change it manually. If you have forgotten your password or want to change your password, click the "forgotten" password link on the log in page.

1. Update Current Cycle Objectives with Accomplishments and Use of Results

- From the Welcome Page, click on **Programs**.

- Choose the **Current Cycle.**
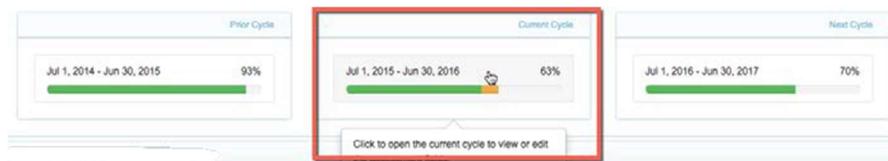
a) Objective Accomplishments and Use of Results

i. For each objective, complete the **1.8 Objective Accomplishments** field and the **1.9 Use of Results** field, by clicking on the field name to open it and then clicking **Edit**. After information is entered, click **Save**.

Objective Accomplishments:
In the large text area, describe the extent to which this objective has been accomplished. The description should fully describe the extent to which each of the specific activities outlined in Section 5 – Steps to Reach the Objective have been achieved and the changes that occurred. Include analysis of what happened.

Use of Results:
In the large text area, reflect on how well the objective was accomplished during this year. Describe how the evaluation results will be used to bring about future improvement or change. Provide details of what will be changed in the next cycle to further enhance the results of this objective. Fully and clearly connect current results with a specific future direction; set continued or new objective(s) for the following year.

Example--focus on improvement: Based on (findings, analysis), the (unit, office, department, program) will (enhance, enrich, further, advance) the (time, cost, quality, quantity) of (function, program, activity).

b) Create PDF of the Current Objectives
    • In the bar above objective 1, **Fields and Responses**, click on **View PDF**.

        A new tab will open in your browser with the PDF. From here, you can download/save the file to
        your computer.

2. Review/Update/Enter Next Cycle Objectives
    • From the Welcome Page, click on **Programs**
    • Click on **Next Cycle**.

 a) Review your objectives for the upcoming year.
        Fields 1 (**Objective Name and Link to Plans**) through 1.6 (**Budget Initiative**) should be complete,
        as applicable.

b) Create PDF of the Upcoming Objectives
    • In the bar above objective 1, **Fields and Responses**, click on **View PDF**.

    A new tab will open in your browser with the PDF. From here, you can download/save the file to
    your computer.

3. Enter Annual Report Information
- From the Welcome Page, click on **Plans**.
- Click on a unit name to edit the annual report field set.

a) Fill in information for each field (1–8.)

NEW THIS YEAR. Section 5 of the Annual Report has two supplementary fields related to the Carnegie Community Engagement Classification. The university will be applying for recertification of the classification in 2018, and these fields will provide a way to gather critical information from the academic units to support this application. The information supplied by the academic units will begin the data collection to be followed up with a more detailed conversation about the activities, number of students, faculty and community members impacted.

Special Note: President's Annual Accomplishments Report
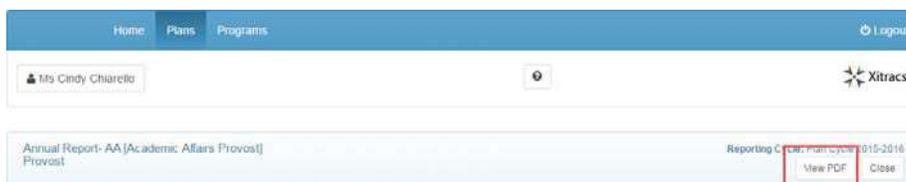**7 University Accomplishments to be recognized and celebrated.** Section 7 is your opportunity to suggest items from your unit achievements to be included in the President's Annual Accomplishments Report. It is used by the president in his speeches and communications and by other university leaders in promoting noteworthy university achievements to various constituencies.

To complete Section 7, review information in sections 4 through 6, copy/paste pertinent text into its appropriate category of Section 7. It's likely you will not include a contribution in all of the sub-categories below. If you believe a particular accomplishment/achievement fits in more than one category, paste the text under all as appropriate.
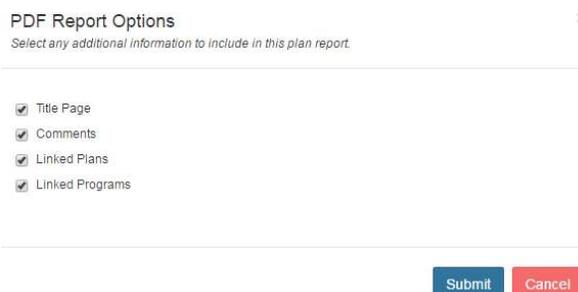
b) Create PDF
- Once you have entered information for all fields, click on **View PDF** in the plan header.

- A pop up window will open with **PDF Report Options**. Select all four options, then click **Submit**.

A new tab will open in your browser with the PDF. From here, you can download/save the file to your computer.

Fields and Responses

1 Academic Unit or Department Head
2 Year of Report
3 Unit Mission
4 Executive Summary
5 Unit Accomplishments
    5.1 Carnegie Community Engagement Classification
        5.1.1 Community Partnerships
        5.1.2 Community-Curricular Engagement
6 Individual Faculty/Staff Honors and Accomplishments
7 University Accomplishments to be recognized and celebrated.
    7.1 Quality Programs (Academic and Non-academic)
    7.2 Madison Collaborative
    7.3 Community Engagement
    7.4 Civic Engagement
    7.5 Engaged Learning
    7.6 Diversity
    7.7 Efficiencies
    7.8 Rankings & Recognitions
    7.9 Comprehensive Campaign
    7.10 Other Noteworthy Accomplishments
8 Addenda

4. Submit Annual Report

If you have the software capability to combine the three PDFs, combine them in this order:

1. Annual Report (PDF created from the Plans section of the JMU-STAR tool.)
2. Current Objectives (PDF created from the Programs section of the JMU-STAR tool, current year plan cycle.)
3. Upcoming Objectives (PDF created from the Programs section of the JMU-STAR tool, next year plan cycle.)

If you do not have the capability to combine PDFs, email all three of the PDFs you just created to Tina Grace (gracetm@jmu.edu) or Cindy Chiarello (grovecg@jmu.edu) with the subject "Combine PDFs for Annual Report." Tina or Cindy will combine the three files into one PDF and send it back to you.

Your Annual Report (one PDF document) is now ready for submission to your AVP/Dean.
NOTE: Contact your AVP/Dean for information on how they prefer to receive your Annual Report (e.g. via email, on your JMU Network shared drive, etc.)

JMU Planning and Reporting Cycle

January
- AVP/Deans meet with Directors/AUHs to discuss objectives to set for the next FY.
- Objectives for the next FY requiring funding are entered into JMU-STAR.
- Budget initiative forms for those objectives requiring funding that have been entered into the planning tool are submitted to the respective AVP/Dean.
- Objectives for the next FY not requiring funding are entered into the planning tool based on the following parameters:
  - Major departmental or unit objectives
  - Action plan items resulting from Program Review
  - Other mutually agreed upon goals and objectives with supervisor

February
- Budget initiative requests are sent to the OBM by the VP's office.
- OBM meets with VP's office to discuss submitted initiatives.
- VP determines which objectives will become strategies on SCHEV six-year plan.

May
- OIR distributes end-of-year information packet.
- OBM meets with the VP to communicate results of initiative funding requests.

June
- Directors/AUHs and AVP/Deans complete June updates in the planning tool for each objective managed through the JMU-STAR planning tool with a specific focus on accomplishments and use of results.
- Directors/AUHs and AVP/Deans review the next FY objectives that were entered in January and update as necessary.
- Board of Visitors approves university budget.

July
- Directors/AUHs and AVP/Deans complete annual reporting based on instructions sent in May.
- Directors/AUHs send annual reports to respective AVP/Dean.
- AVP/Deans submit annual reports to respective VP.
- VP's office communicates with AVP/Deans results of initiative requests.
- AVP/Deans report results of initiative requests to Directors.
- AVP/Deans submit previous FY key accomplishments to the VP for the President's Annual Accomplishments Report.

August
- VPs submit final annual accomplishments report to the President, who uses the information for presentations, speeches, development, etc.
- Updates are made to objectives in the JMU-STAR based on planning retreat/meetings.

November
- OBM begins the budget process for the following FY by issuing requests for cost-to-continue items, review of permanent budget revisions and reporting authority.
- Forms for E&G initiative requests are made available to departments.
- Send updated division/unit strategic plan to OIR for posting to the planning tool so objectives can be written in alignment with JMU and division/unit strategic plans.

December
- Directors/AUHs hold departmental discussions concerning objectives to be written into the planning tool for the following FY.
- OIR makes initial contact with instructions concerning writing objectives into the planning tool for the following FY.

JMU--STAR--Add an Objective

Elements of the Objective

The elements (field set) of the objective are:

Fields and Responses		Copy	View PDF	Show All
1 Objective Name and Link to Plans				Incomplete
1.1 Steps to meet the objective				Incomplete
1.2 Level for Publication				Incomplete
1.3 Key Word Tags (optional)				Incomplete
1.4 Collaboration/Integration (optional)				Incomplete
1.5 Evaluation methods				Incomplete
1.6 Budget Initiative				Incomplete
1.7 Mid-Year Update (optional)				Incomplete
1.8 Objective accomplishments				Incomplete
1.9 Use of results				Incomplete

---

1 Objective Name and Link to Plans:

Instructions:

NAME OBJECTIVE: Enter the short name and the objective description.

Short Description: Use division/college/department abbreviations. (CAL--Eng--….)

Long Description:

Instructions:

Clearly and concisely describe the objective. Incorporate the following criteria into the objective description.

Criteria:

The objective:

- Specifically states a reason why it is important.
- Fully describes an outcome, product, deliverable, or result to be achieved.

Enlarge boxes as appropriate

LINK to the JMU Strategic Plan
Select a Core Quality and university goal that this objective promotes. (http://www.jmu.edu/jmuplans)
There is an unpublished Core Quality—12: Other endeavors in support of the university's mission. Use this one only if the objective does not fit into any of the other Core Qualities.
Core Quality:_____(1 through 12)
University Goal:_____(e.g., 1a, 9b)

LINK to the unit's annual report

1.1 Steps to meet the objective:
Instructions:
Fully describe the key steps to reach the objective.
Criteria:
All key steps:
- Are fully described with specific enough detail to be measureable.
- State a specific timeframe for completion.

1.2 Level for Publication
Public_____
Private_____

1.3 Key word tags (optional)

1.4 Collaboration/Integration (optional)

1.5 Evaluation methods
Instructions:
Describe the specific, systematic evaluation methods that will be used to measure change.

Criteria:
The objective will be evaluated/assessed using specific, systematic evaluation method(s) that are clearly linked to expected change/results.

1.6 Budget initiative:
Will there be a Budget Initiative submitted for this objective?
Yes_____
No_____

1.7 Mid-year update (*Optional)
Instructions:
Describe the extent to which the objective has been accomplished by mid-year.

Criteria:
The mid-year update fully describes the extent to which each of the specific activities outlined in Section 5 – *Steps to Reach the Objective* have been achieved and the changes that occurred.

1.8 Objective accomplishments
Instructions:
Describe the extent to which this objective has been accomplished. Include the activities and the changes that occurred.

Criteria:
Fully describes the extent to which each of the specific activities outlined in Section 5 – *Steps to Reach the Objective* have been achieved and the changes that occurred.

_____

1.9 Use of results
Instructions:
Reflect on how well the objective was accomplished during this year. Describe how the evaluation results will be used to bring about future improvement or change. Provide details of what will be changed in the next cycle to further enhance the results of this objective

Criteria:
Fully and clearly connect current results with a specific future direction; sets continued or new objective(s) for the following year.

Example-focus on improvement:
The (*unit, office, department, program*)
<u>will</u> (*enhance, enrich, further, advance*)
the (*time, cost, quality, quantity*)
of (*function, program, activity*).