



ASSIST™ Technical Guide

Building and Managing Goals and Plans

Questions

888.413.3669

contactus@advanc-ed.org

Building and Managing Goals and Plans

The Adaptive System of School Improvement Support Tools (ASSIST™) provides a step-by-step process by which schools and school systems can identify goals, construct measurable objectives, identify strategies and define activities. ASSIST takes the guesswork out of planning by allowing the user to respond to a series of guiding questions that result in a quality measurable objective. The system then allows the user to identify strategies and activities to meet each objective. This is a thorough process by which the user assigns resources, establishes timelines and identifies staff responsible for implementation. Once goals are built in ASSIST, the user can assign goals to create various improvement plans and print working documents.

This component of ASSIST is dynamic and supports the continuous improvement process by allowing schools and school systems to reuse the goals to construct various plans as needed, as well as track the implementation of goals and plans while allowing for the ongoing modification and addition of goals based on new data and information.

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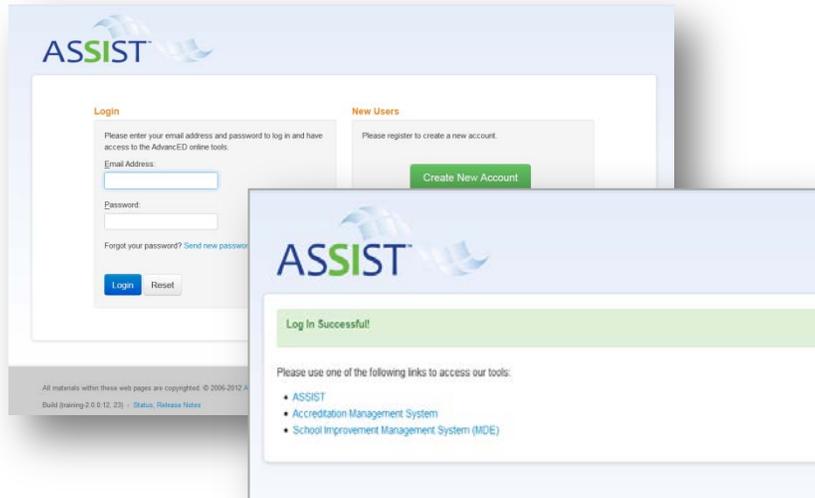
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Accessing Goals and Plans in ASSIST

Goals and Plans can be accessed by logging into the Adaptive System of School Improvement Support Tools (ASSIST) at www.advanc-ed.org/assist.

To access ASSIST, enter your **email address** and **password** on the login page. Once successfully logged in, select the **ASSIST link**.

If you need additional assistance with the login process, refer to the **ASSIST Quick Start Guide** at www.advanc-ed.org/assistresources.



Documents

	Due	Status
Accreditation Report	April 30, 2014	Submitted
External Review Report	May 8, 2014	Approved
Accreditation Progress Report	May 1, 2015	Not started

Portfolio

If you have completed an External Review during the 2013-2014 year, you will see your **Index of Education Quality™ (IEQ™) dashboard** after logging into ASSIST.

Select **Portfolio** to go to your account. You can find all tasks assigned to your school in the **Documents** section.

If you do not yet have an IEQ Dashboard, select the **Goals & Plans** tab.

Portfolio Profile Diagnostics & Surveys Assurances **Goals & Plans** Reviews Progress

Goals & Plans

Streamline the process of developing and managing goals.

Goals Plans Reports

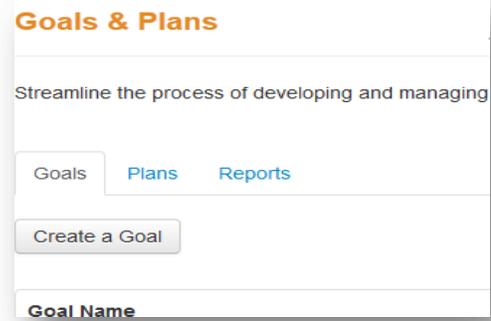
Create a Goal

Goal Name	Objectives	Strategies	Activities
All students will improve in reading comprehension	3	5	5
All students will become College and Career Ready	1	3	4
All students will become proficient in writing	1	3	3
All students will improve in mathematics problem solving across the curriculum.	1	1	1
Increase the percentage of effective Principals from 75 in 2015 to 95 in 2020	1	1	1

For more information about the IEQ™ Dashboard, go to www.advanc-ed.org/assistresources and select the **Technical Guide for the Index of Education Quality (IEQ™)**.

Building Goals

Select **Create a Goal** to build an unlimited number of goals.



Step 1: Goal Name

Select **Create a Goal** to begin the Goal Builder process. Type a **goal** into the **narrative box** provided.

Definition:

A **goal** is a brief statement reflecting an end result or desired condition you want to achieve.

Example:

All students will be proficient in mathematics.

Next, determine if your goal is **academic** or **organizational**. Your selection determines which prompts are provided during the construction of your measurable objective in Step 2.

Definition:

An **academic goal** is a goal that aims to meet some criteria related to student academic performance, competency or achievement.

Definition:

An **organizational goal** is a goal that aims to meet non-academic criteria that pertain to the institution itself.

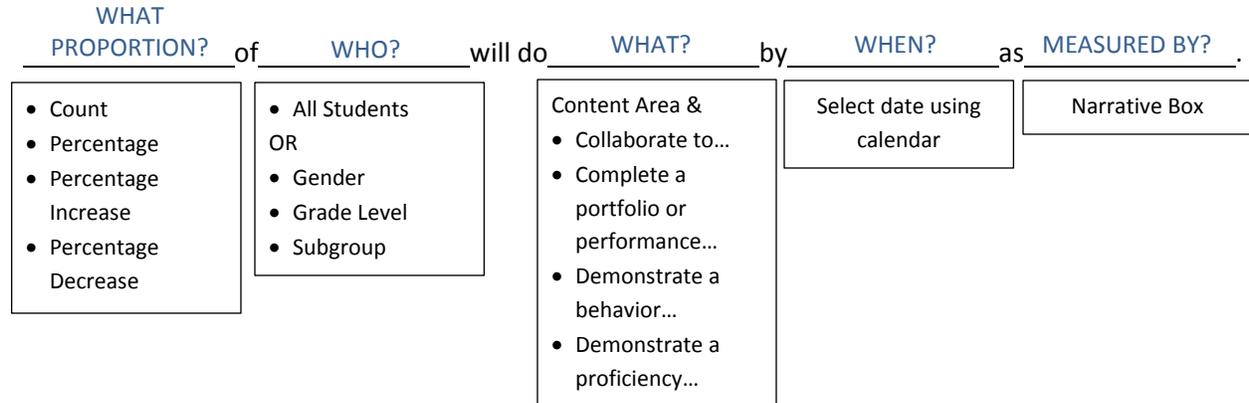
Once your goal is complete, select **Continue**.

Step 2: Objective

The construction of a measurable objective in ASSIST is done systematically using a series of prompting questions with a wizard-like tool. Below is an outline of how the measurable objective questions are prompted depending on the goal type selected during Step 1 above.

Academic Goal

Constructing a measurable objective for an academic goal is a six-step process.



1. Who?

Select **Yes - Identify Specific Populations** to choose the **target population** using the check boxes provided for gender, grades and subgroups or select **No - The Objective is to be applied to all students**. Select **Next**.

In order to make one or more selection within a category, select the **category** to activate the **boxes** below.

2. Proportion?

Identify a **proportion** using the **drop-down menu** and then provide a **count** or **percentage** in the **narrative box**. Select **Next**.

3. What?

Select a **content area** from the **drop-down menu**. Identify what the target population should be able to achieve by using the **drop-down menu** and **narrative box** to construct a **complete statement**. Select **Next**.

What does the target population need to achieve?

What content area will this objective apply to?

Mathematics

When they achieve this objective, what will the target population be able to do? Please complete

The target population should

demonstrate a proficiency in problem solving

4. Measured By?

Enter the **measurement** to be used for this objective in the **narrative box**. Select **Next**.

How will success be measured? Please complete the following statement...

This objective will be measured by

State mathematics assessment

Back Cancel Next

5. By When?

Use the **calendar** to select a **date**. Select **Next**.

When should this objective be reached?

03/14/2013

Mar 2013

Su	Mo	Tu	We	Th	Fr	Sa
					1	2
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	29	30
31						

6. Preview

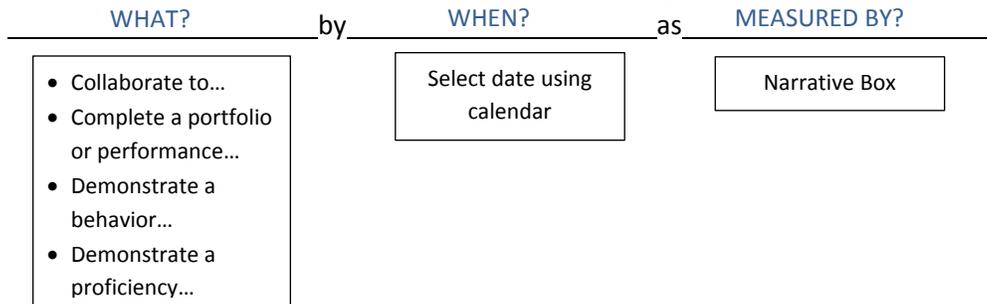
Review the **measurable objective** constructed from the information provided in the steps above. If you are satisfied, select **Accept**. If you need to make changes, select **Back**.

Your Objective...

87% of Limited English Proficient First and Second grade students will demonstrate a proficiency in problem solving in Mathematics by 03/14/2013 as measured by State mathematics assessment.

Organizational Goal

Constructing a measurable objective for an organizational goal is a four-step process.



1. What?

State what will be achieved upon completion of the objective using the **drop-down menu** and **narrative box** to construct a **complete statement**. Select **Next**.

2. Measured By?

Enter the **measurement** to be used for this objective in the **narrative box**. Select **Next**.

3. By When?

Use the **calendar** to select a **date**. Select **Next**.

4. Preview

Review the **measurable objective** constructed from the information provided in the steps above. If you are satisfied, select **Accept**. If you need to make changes, select **Back**.

Step 3: Strategy

Every objective in ASSIST must have at least one strategy and activity. Multiple strategies can be provided for a single objective. See the **Adding Goal Components** section of this document for instructions on how to add multiple strategies to the same objective. When adding a strategy to a measurable objective, the system allows you to add an existing strategy if one or more strategies already exist within the goal.

Definition: A **strategy** is an action that is specific, planned, evidence-based and focused on student results to accomplish a goal and objective. A strategy can be thought of as the “how” to achieve the objective and/or goal. There can be multiple strategies to achieve each measurable objective.

Example: *Non-Linguistic Representation* — Staff will implement appropriate non-linguistic representation tools to increase the mathematical critical thinking abilities of all students including African Americans and students with disabilities.
Research — The implementation of Thinking Maps as a way to deliver non-linguistic representation has been shown to increase student achievement in reading in the content areas for different populations of students, including students with disabilities.
(Student Success with Thinking Maps, edited by David Hyerle)

To create a new strategy:

Provide a **Strategy Name** and brief **Description** of the strategy.

NOTE: All strategies must have a unique name.

Next, describe how the strategy will work and how it will be implemented. State the **Research and Evidence** used to support this strategy. Select **Next**.

If you are satisfied, select **Accept**. If you need to make changes, select **Back**.

NOTE: Research must be provided to meet Title I requirements.

The screenshot shows the 'Step 3: Strategy' form in the ASSIST system. At the top, there are four tabs: 'Step 1: Goal Name', 'Step 2: Objective', 'Step 3: Strategy' (which is highlighted in blue), and 'Step 4: Activity'. Below the tabs is a brief definition of a strategy: 'A Strategy is an action that is specific, planned, evidence based and focused on student results to accomplish a goal and objective. A strategy can be thought of as the "how" to achieve the objective and/or goal. There can be multiple strategies to achieve each measurable objective.' The form contains several input fields: 'Strategy Name' (a text box), 'How will the strategy work? and/or How will the strategy be implemented?' (a large text area), 'State the research used to support this strategy' (a text box), and 'What evidence will you use to measure success?' (a text box). At the bottom left, it says '600 characters left'. At the bottom right, there are 'Next' and 'Cancel' buttons.

If you choose to link an existing strategy that you already have created, select **Choose an Existing Strategy**, select the **strategy** you wish to use and select **Add Selected Strategy**. This option will only appear if one or more existing strategies are available to add.

Goal Builder

Step 1: Goal Name Step 2: Objective **Step 3: Strategy** Step 4: Activity

A Strategy is an action that is specific, planned, evidence based and focused on student results to accomplish a goal and objective.

Choose "Add strategy" to create a new strategy

or...

click on "Choose an existing strategy" to link a strategy you have already created with the objective.

Cancel **Add strategy** **Choose an existing strategy**

Goal Builder

Step 1: Goal Name Step 2: Objective **Step 3: Strategy** Step 4: Activity

Link an existing Strategy

Strategies within a goal can be shared across Objectives.

Select an existing Strategy from the list below to link to the Objective. Please note that this will link the Strategy and all of its existing Activities. One Strategy may be selected at a time.

IXL

Increase Parent Involvement

Cancel **Add Selected Strategy**

Only strategies within the goal can be selected. It is not currently possible to share strategies with objectives under a different goal.

Sharing Strategies across Objectives

Shared strategies are flagged in ASSIST and the plan for easy identification. The **Activity by Funding Source** breakdown at the end of the plan is unduplicated.

Sample SIP output for a shared strategy

Measurable Objective 3:
A 15% increase of Third and Fourth grade students will Demonstrate BOE's.

(shared) Strategy 1:
Reading Strategies - Reading strategies will be taught to non-

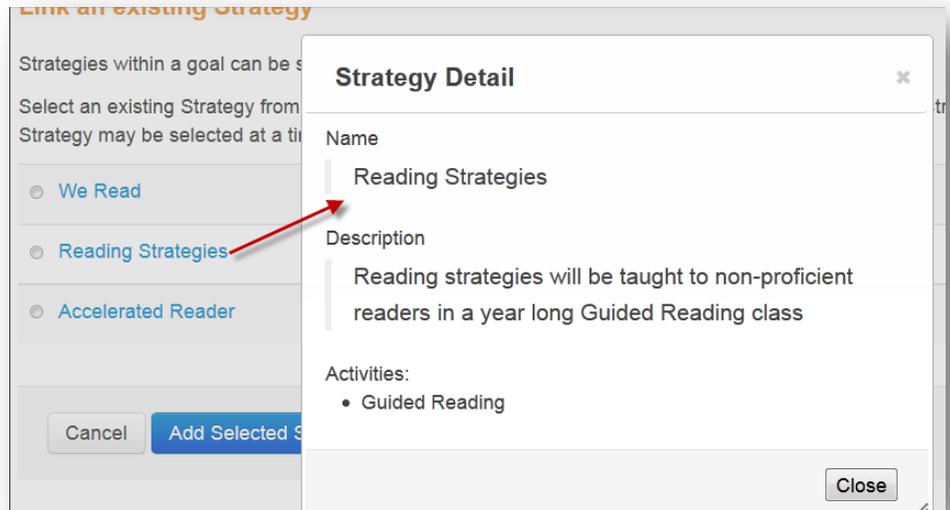
Objective	A 10% increase of All Students will Demonstrate...	0 notes	Action ▾
Strategy	We Read	0 notes	Action ▾
Activity	We Read	0 notes	Action ▾
Strategy	Reading Strategies	0 notes	Action ▾
Activity	Guided Reading	0 notes	
Objective	A 15% increase of Third and Fourth grade studen...	0 notes	
Strategy	Reading Strategies	0 notes	
Activity	Guided Reading	0 notes	

View
Edit
Add Activity
Add Progress Note
Remove
Action ▾

Unassociate a shared strategy by selecting **Remove** link under the **Action** menu. This will not delete the strategy.

Sharing a strategy automatically shares the activities within that strategy.

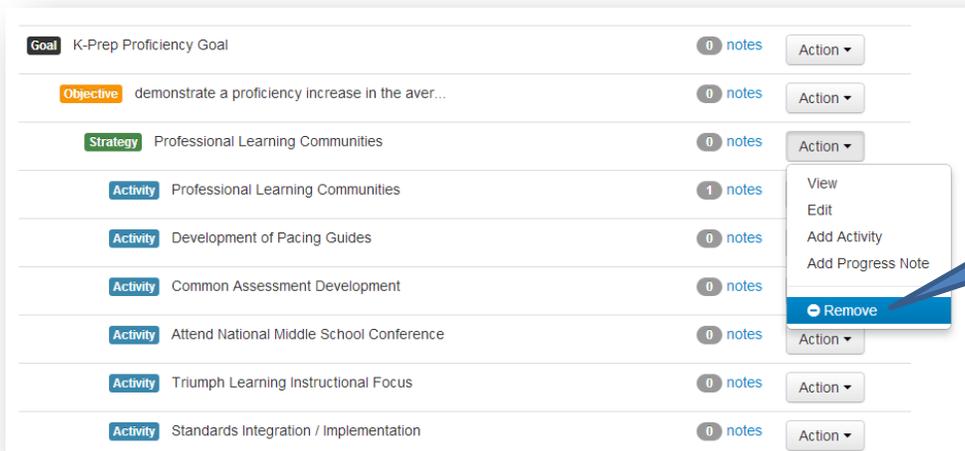
Select the **strategy name** to open a pop-up window with the **strategy description** and list of **activities** within the strategy.



Deleting a Strategy

Within the goal builder, if a goal or objective is deleted, all of the strategies and activities associated with the goal or objective also are deleted. Once the strategies have been deleted, they are considered a retired strategy and the name of the strategy cannot be reused. Strategies and activities must be orphaned before deleting the goal or objective to be reused.

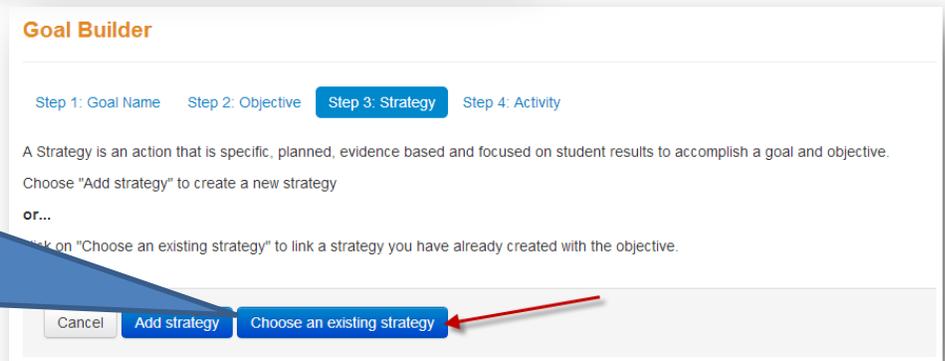
Orphaning a Strategy



Select **Action** to the right of the screen to orphan a strategy. Select **Remove**.

The strategy is orphaned and ready to be adopted by another objective. Create your **objective** using the previous process.

At **Step 3: Strategy**, select **Choose an existing strategy**.



Step 4: Activity

Every strategy in ASSIST must have at least one activity. Multiple activities can be provided for a single strategy. See the **Adding Goal Components** section of this document for instructions on how to add multiple activities.

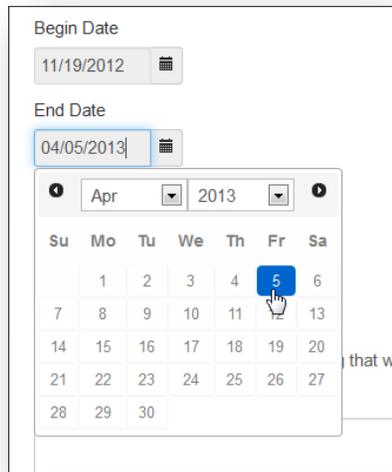
Definition: An **activity** is an individual task or function performed as part of an overall strategy for instruction or improvement. Activities are specific and include a comprehensive description of the steps to be taken, timelines, resource allocations, staff responsible and a defined activity type (e.g., professional development, direct instruction, community engagement, etc.). Multiple activities may be required to address each strategy.

Example: Monitor Implementation of Writing to Win Strategies
 Monitor the implementation of the instructional strategies through walk-thrus and program fidelity checks. 1/5/2011 — 5/10/2012, \$0, Principal, Literacy Coach, Other.

Provide an **Activity Name** and brief **Activity Description**. Using the **drop-down menu** provided, identify an **Activity Type**.

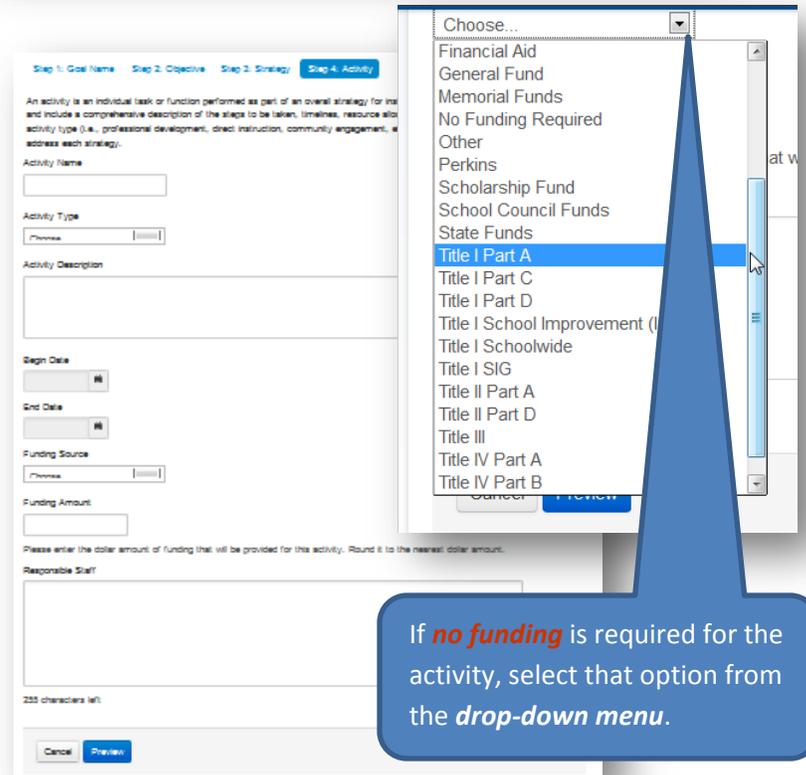
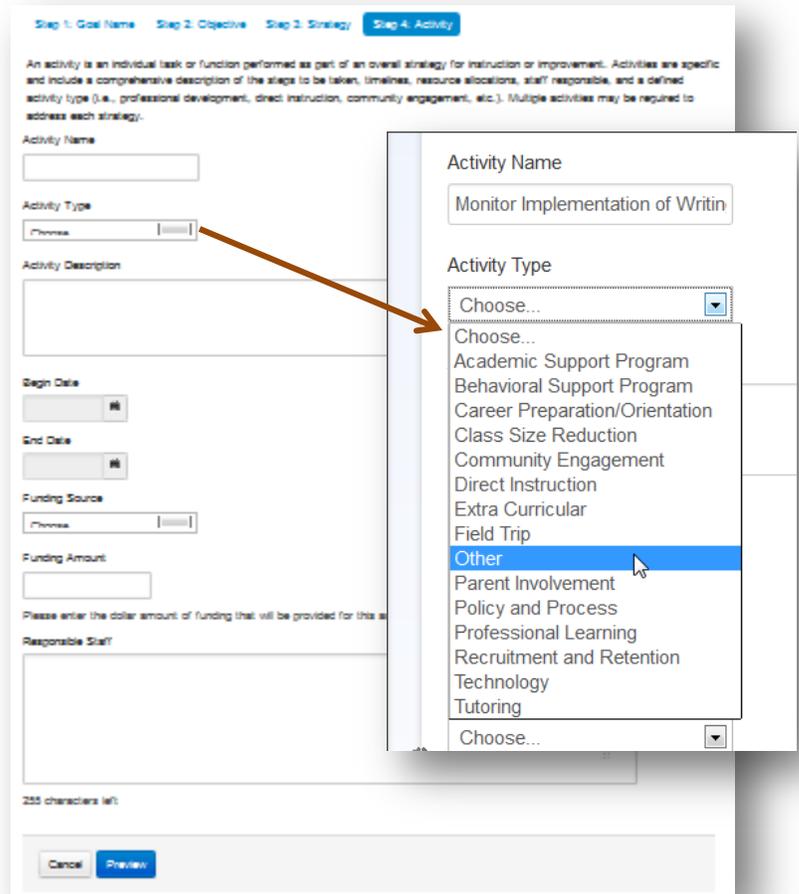
Note: An **Other** option is available if your activity does not fit within one of the pre-defined types.

Use the **calendar** to select activity **Begin Date** and **End Date**.



Use the **drop-down menu** to select a **Funding Source** and type a **Funding Amount** into the **box** provided.

Note: Multiple funding sources can be added to a single activity. See the **Editing a Goal** section of this guide for instructions.



If **no funding** is required for the activity, select that option from the **drop-down menu**.

The last element is the **Responsible Staff**. Using the **narrative box** provided, list the **staff responsible** for activity implementation and oversight. Separate each name by a comma or hard return.

Once every field is complete, select **Next**. If you need to make changes, select **Back**. If you are satisfied with your activity, select **Accept**.

Once you complete a goal, objective, strategy and activity, you will be redirected to the **Goal Details** page that shows the hierarchy of the goal. Select **Action** to view the full goal component and/or make edits.

The screenshot displays the 'Goal Details' interface. At the top, a blue banner reads 'FY!! This goal has not yet been added to any plans.' Below this, a summary states 'This goal has 1 objectives, 1 strategies and 1 activities.' The main content is a list of four items, each with a category label, a description, a '0 notes' indicator, and an 'Action' dropdown menu:

- Goal:** All students will improve in mathematic problem solving across the curriculum.
- Objective:** 88% of Limited English Proficient First and Sec...
- Strategy:** Supplemental mathematics instruction
- Activity:** After-school tutoring

An expanded 'Action' menu is shown for the objective, with a hand cursor pointing to the 'Edit' option. The menu items are: View, Edit, Add Strategy, Add Progress Note, and Delete.

Adding Goal Components

Additional components (i.e., objectives, strategies and activities) can be added to a goal at any time.

Create a Goal

Goal Name	Objectives	Strategies	Activities
All students will be proficient in mathematics.	1	4	4
All students will be proficient in reading.	1	4	4
All students will be proficient in writing.	1	3	3
All students will be proficient in social studies.	1	3	3
All students will be proficient in science.	1	3	3

From the **Goals & Plans** overview page, select the **goal** for which you would like to add components.

From the **Goal Details** page, select **Action** for the level above where you want to add a component. For example, if you want to add a **strategy**, select **Action** at the **objective** level.

Goal Details

This goal has 3 objectives, 5 strategies and 5 activities.

Goal All students will improve in reading comprehension 0 notes Action

Objective 100% of First, Second, Third, Fourth and Fifth ... 0 notes Action

Strategy Reading in the Content Area 0 notes Action

Activity Content Area Reading Strategies 0 notes Action

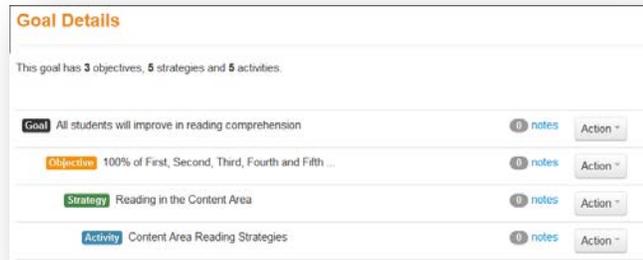
Context menus for adding components:

- Objective level: Edit, Add Objective, Add Progress Note, Delete, Add Strategy, Add Progress Note
- Activity level: View, Edit, Add Activity, Add Progress Note, Remove

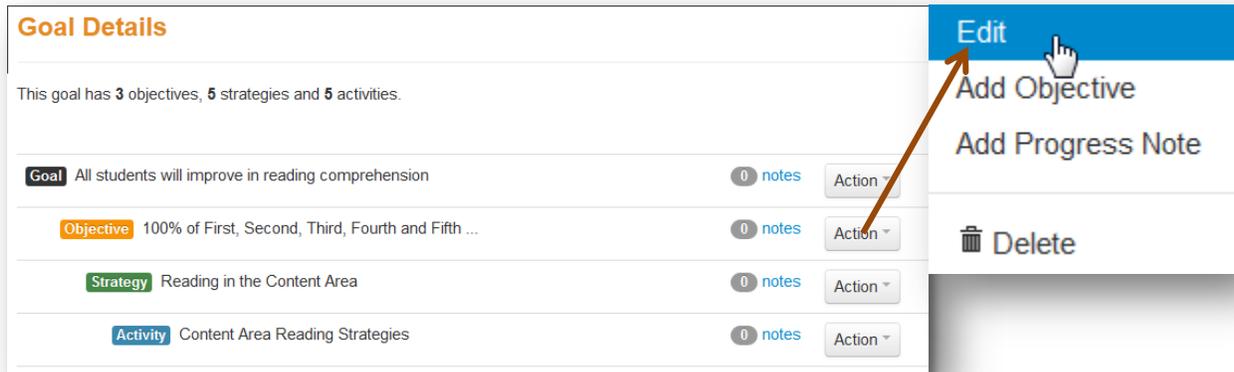
Editing a Goal

Adding a **goal component** takes you to that specific page where you can provide the additional **objective, strategy or activity** information and **Accept**.

Goals in ASSIST are never locked. Edit a goal or any of its components (i.e., objectives, strategies, activities and funding sources) at any time by selecting the **goal** from the **Goals & Plans** overview page.



From the **Goal Details** page, select **Action** for the component that needs to be edited and select **Edit**.



Depending on the component chosen for editing, you will be taken to a screen where you can make the desired edits. For example, when editing an objective, you have the ability to select each section of the objective to make changes.

Edit Measurable Objective

Step 1: Goal Name Step 2: Objective Step 3: Strategy Step 4: Activity

You can edit the measurable objective by clicking on each section of the statement below.

100% of First, Second, Third, Fourth and Fifth grade students demonstrate a proficiency strategies in English Language Arts by when as measured by PAWS and MAP RIT score

Select the target population that applies to this objective.

<input type="checkbox"/> Particular Gender	<input checked="" type="checkbox"/> Particular Grades	<input type="checkbox"/> Particular Ethnicity
<input type="radio"/> Female	<input type="checkbox"/> Pre-K	<input type="checkbox"/> African American
<input type="radio"/> Male	<input type="checkbox"/> Kindergarten	<input type="checkbox"/> American Indian/Alaska Native
	<input checked="" type="checkbox"/> First	<input type="checkbox"/> Asian American/Pacific Islander
	<input checked="" type="checkbox"/> Second	<input type="checkbox"/> Asian American
	<input checked="" type="checkbox"/> Third	<input type="checkbox"/> Hispanic/Latino
	<input checked="" type="checkbox"/> Fourth	<input type="checkbox"/> White
	<input checked="" type="checkbox"/> Fifth	<input type="checkbox"/> Free/Reduced Lunch
	<input type="checkbox"/> Sixth	<input type="checkbox"/> Individualized Education Program
	<input type="checkbox"/> Seventh	<input type="checkbox"/> Limited English Proficiency
	<input type="checkbox"/> Eighth	

Cancel Update

Add a Resource

To add an additional resource (funding source) to an Activity, use the process outlined above to edit the Activity and then scroll to the bottom of the page and select **Add Resource**.

The screenshot shows a table with the following data:

Funding Source	Funding Amount	
No Funding Required	\$ 0	Delete

Below the table is an "Add Resource" button. An arrow points from this button to a modal form titled "Add Resource". The modal form contains the following fields:

- A message: "All form fields are required."
- Funding Source: A dropdown menu with "Choose..." selected.
- Funding Amount: A text input field.
- Buttons: "Add Resource" and "Cancel".

Repeat this process as needed until all resources have been added to the Activity. Select **Update** on the **Activity** page.

Creating a Plan

Using the goals created in your institution's ASSIST account, you can create an unlimited number of plans.

From the **Goals & Plans** overview page, select the **Plans** tab and select **Create a Plan**.

Provide a **name** and **description** for your plan.

The screenshot shows the "Goals & Plans" overview page with the following elements:

- Header: "Goals & Plans"
- Sub-header: "Streamline the process of developing and managing goals."
- Navigation tabs: "Goals", "Plans" (highlighted with a yellow dashed border), and "Reports".
- Button: "Create a Plan".

The screenshot shows the "Create or Edit Plan" form with the following fields:

- Name: A text input field.
- Description: A text input field.

The name you provide will show on the plan output and help differentiate one plan from another on the **Goals & Plans** overview page.

The plan name can be changed at a later time.

Next, select the **goals** you want to include in the plan. Selecting at the goal level automatically selects all objectives, strategies and activities within that goal.

Selecting at a lower level, such as the activity, allows for only that specific activity and its related strategy, objective and goal to be included in the plan.

Included	Node	Name
<input checked="" type="checkbox"/>	Goal	All students will improve in reading comprehension
<input type="checkbox"/>	Objective	100% of First, Second, Third, Fourth and Fifth grade students will demonstrate a proficiency a
<input type="checkbox"/>	Strategy	Reading in the Content Area
<input type="checkbox"/>	Activity	Content Area Reading Strategies
<input type="checkbox"/>	Strategy	Summer School
<input type="checkbox"/>	Activity	Summer School
<input checked="" type="checkbox"/>	Objective	A 10% increase of Fifth grade students will demonstrate a proficiency reading comprehension and...
<input type="checkbox"/>	Strategy	We Read
<input type="checkbox"/>	Activity	We Read
<input checked="" type="checkbox"/>	Objective	A 15% increase of Third and Fourth grade students will demonstrate a proficiency reading compre...
<input type="checkbox"/>	Strategy	Reading Strategies
<input type="checkbox"/>	Activity	Guided Reading
<input type="checkbox"/>	Strategy	Accelerated Reader
<input type="checkbox"/>	Activity	Accelerated Reader
<input type="checkbox"/>	Goal	All students will become proficient in Math
<input type="checkbox"/>	Objective	A 10% increase of First, Second, Third, Fourth and Fifth grade students will demonstrate a p

Included	Node	Name
<input checked="" type="checkbox"/>	Goal	All students will improve in reading comprehension
<input type="checkbox"/>	Objective	100% of First, Second, Third, Fourth and Fifth grade students will demonstrate a proficiency a
<input type="checkbox"/>	Strategy	Reading in the Content Area
<input type="checkbox"/>	Activity	Content Area Reading Strategies
<input type="checkbox"/>	Strategy	Summer School
<input type="checkbox"/>	Activity	Summer School
<input checked="" type="checkbox"/>	Objective	A 10% increase of Fifth grade students will demonstrate a proficiency reading comprehension and...
<input checked="" type="checkbox"/>	Strategy	We Read
<input checked="" type="checkbox"/>	Activity	We Read
<input type="checkbox"/>	Objective	A 15% increase of Third and Fourth grade students will demonstrate a proficiency reading compre...
<input type="checkbox"/>	Strategy	Reading Strategies

The flexibility of the ASSIST plan builder allows for the creation of multiple plans (e.g., Technology Plans, Professional Development Plans, 30-60-90 Day Plans, etc.), without requiring any duplication of effort.

Once you have selected all the desired goals, select **Save**. Select **View PDF** to view your plan **output**.

Note: If you update a goal component after it has been included in a plan, the plan includes only the changes if you return to the plan and remove and re-add the changed goal component and save the plan changes.

2012-13 School Improvement Plan

Sample School
Sample School District

John Smith
0000 Kentucky Address
Kentucky City, KY 00000

Activity	Activity Type	Begin Date	End Date	Resource Assigned	Source Of Funding	Staff Responsible
Each content area teacher will teach specific reading strategies that we enable to their students to better grasp the content of the course.	Direct Instruction	07/01/2013	06/30/2013	\$0	State Funding (Required)	Rebecca Stone, Dawn Wash
Students will participate in activities designed to help them improve their reading comprehension.	Tutoring	07/01/2012	06/30/2013	\$6500	State Funding (Required)	Josh Jackson
Students will have a small-group instruction with Guided Reading teachers focusing the application of multiple, pre, during and post-reading strategies such as corrections, predictions, visualization, rereading, summarizing, decoding and fix-up strategies.	Direct Instruction	07/01/2013	06/30/2013	\$2500	State Funding (Required)	Denise Green, Heather Cochran, Heather Minton

Tracking Goal Progress

Once you have built goals in ASSIST you can use the **Progress Note** functionality to track implementation.

To begin, select the **goal** for which you would like to track progress from the **Goals & Plans** overview page.

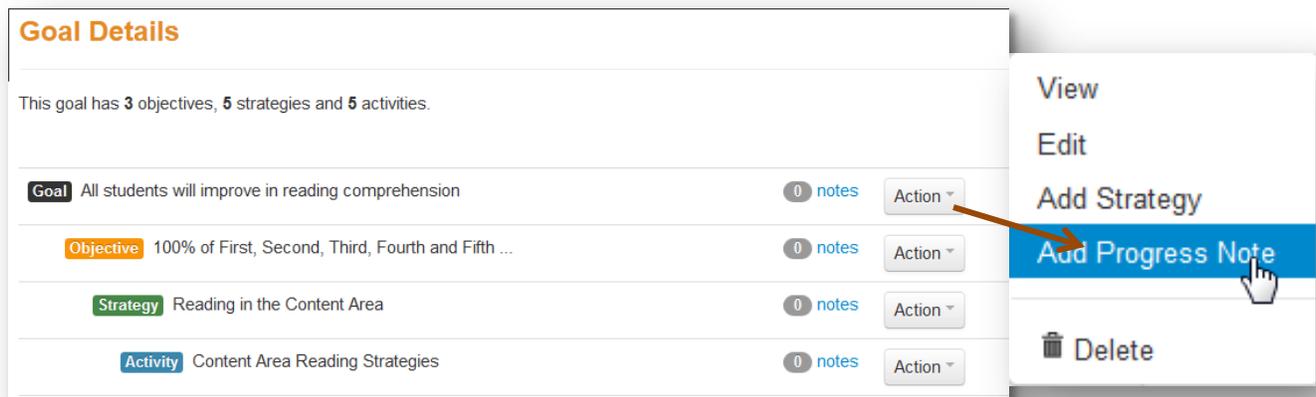


Goal Details

This goal has 3 objectives, 5 strategies and 5 activities

Goal	All students will improve in reading comprehension	0 notes	Action ▾
Objective	100% of First, Second, Third, Fourth and Fifth ...	0 notes	Action ▾
Strategy	Reading in the Content Area	0 notes	Action ▾
Activity	Content Area Reading Strategies	0 notes	Action ▾

From the **Goal Details** page, select **Action** for the component where you would like to make a progress note. Select **Add Progress Note** from the **menu**. Progress notes can be added at all levels of the goal.



Goal Details

This goal has 3 objectives, 5 strategies and 5 activities.

Goal	All students will improve in reading comprehension	0 notes	Action ▾
Objective	100% of First, Second, Third, Fourth and Fifth ...	0 notes	Action ▾
Strategy	Reading in the Content Area	0 notes	Action ▾
Activity	Content Area Reading Strategies	0 notes	Action ▾

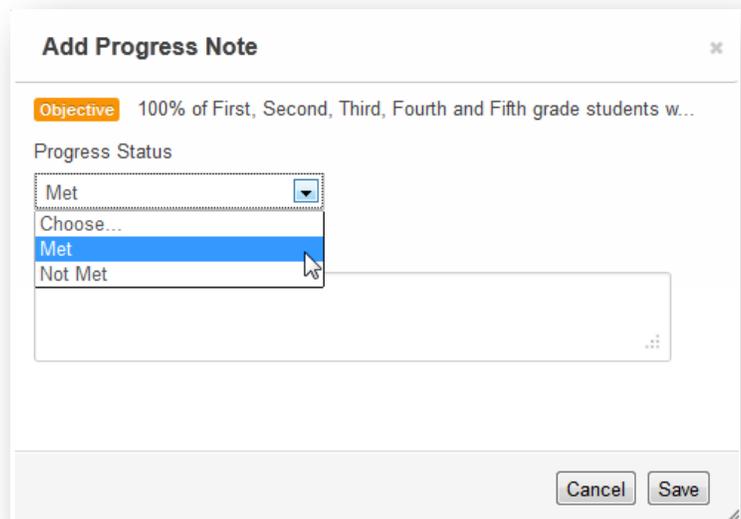
- View
- Edit
- Add Strategy
- Add Progress Note**
- Delete

Type your **comment** in the **pop-up window**. You can add an additional progress status at the measurable objective and activity levels.

Measurable Objective: Met or Not Met

Activity: In Progress, Complete, Not Completed or Not Applicable

Provide the desired **comment and/or progress status** and select **Save**.



Add Progress Note

Objective 100% of First, Second, Third, Fourth and Fifth grade students w...

Progress Status

Met ▾

Choose...

Met

Not Met

Cancel Save

The number of progress notes added to each goal component is displayed on the **Goal Details** page.

To view the **Progress Log** of all notes provided for a goal component, select **Notes**.

Goal Details

This goal has 3 objectives, 5 strategies and 5 activities.

Goal	All students will improve in reading comprehension	1 notes	Action
Objective	100% of First, Second, Third, Fourth and Fifth ...	1 notes	Action
Strategy	Reading in the Content Area	0 notes	Action
Activity	Content Area Reading Strategies	3 notes	Action
Strategy	Summer School	0 notes	Action

3 notes Action

Progress Log

Activity Content Area Reading Strategies

Status	Comment	Created On	Created By
Completed	This activity has been completed. An evaluation of the new reading strategies is currently being implemented.	November 4, 2012	Mrs. Heather S Kinsey
In Progress	Teachers have been trained.	November 21, 2012	Mr. John Joe
In Progress	Materials have been ordered.	November 22, 2012	Mrs. S K

The **Progress Log** identifies who made the progress note and when.

Include Progress Notes in a Plan
 Progress notes can be included in the plan output if desired. If you have already created the plan, select the **Plans** tab from the **Goals & Plans** overview page and select the **plan**.

Scroll to the bottom of the **View Plan** page and select **Edit Plan** to open the **Create** or **Edit Plan** screen, where you will find an option to include progress notes.

Check the **box** and select **Save**. The progress notes are included when you view the plan output.

Goals & Plans

Streamline the process of developing and managing goals.

Goals Plans Reports

Create a Plan

Plan Name	Number of Goals
Flushing High School Academic Goals	5

Include progress notes for the goals selected.

Goals Reporting

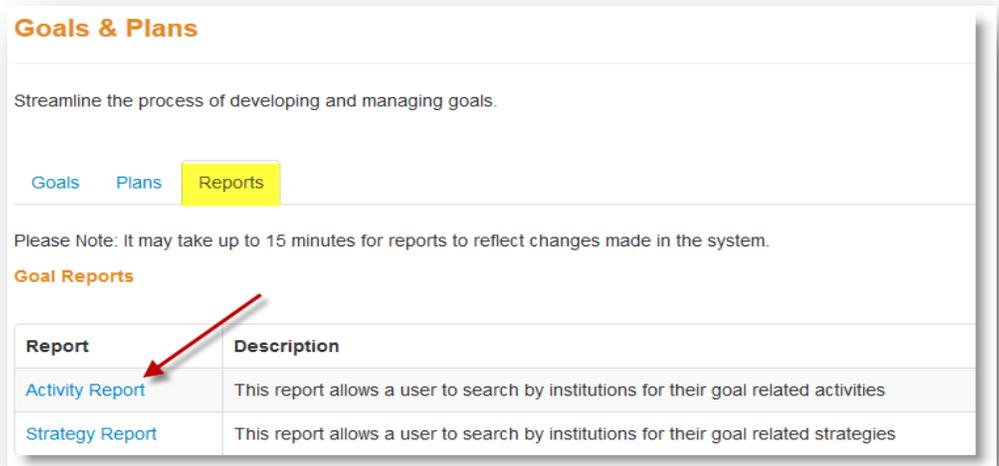
Reporting provides a way to export activity and strategy information in a CSV or Excel format to support the ongoing management and oversight of the improvement process.

From the **Goals & Plans** tab, select the **Reports** tab. Select the **report name** of the report you want to access.

Upon selecting the report, the system presents a series of filtering criteria. Select the **criteria** you want to include in your report output.

For example, if you want to view all professional learning activities scheduled to take place between March 1, 2013 and August 1, 2013, select the **Activity Type** of **Professional Learning** from the **drop-down menu** and enter the applicable Activity **begin and end dates**.

Once your criterion is identified, select **Export as CSV** or **Export as EXCEL**. The system will email you the requested file within 10-15 minutes.



Goals & Plans

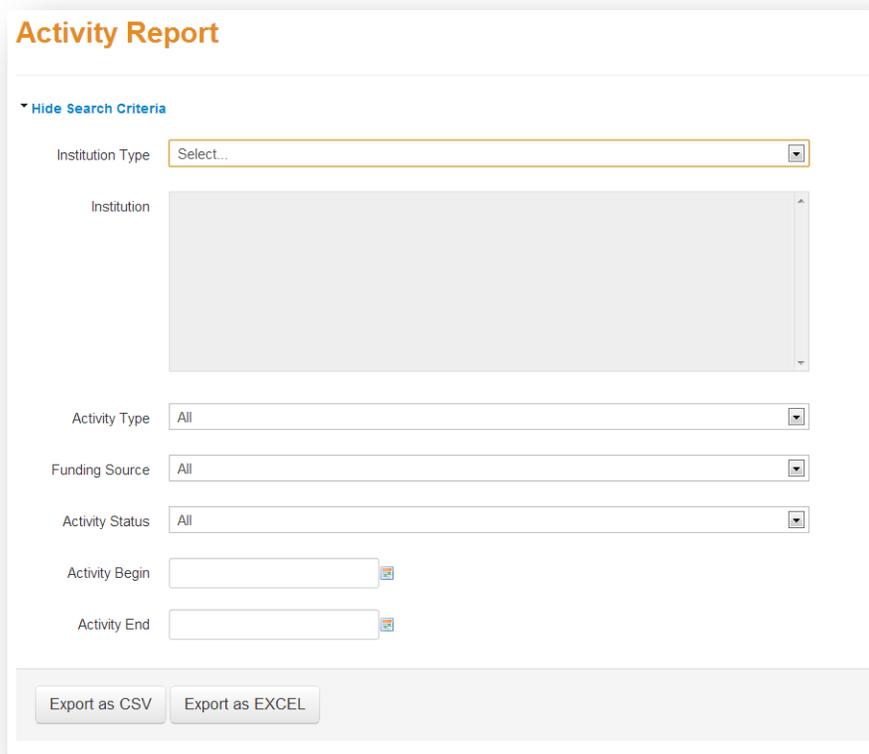
Streamline the process of developing and managing goals.

Goals Plans **Reports**

Please Note: It may take up to 15 minutes for reports to reflect changes made in the system.

Goal Reports

Report	Description
Activity Report	This report allows a user to search by institutions for their goal related activities
Strategy Report	This report allows a user to search by institutions for their goal related strategies



Activity Report

Hide Search Criteria

Institution Type: Select...

Institution: [Empty list box]

Activity Type: All

Funding Source: All

Activity Status: All

Activity Begin: [Date picker]

Activity End: [Date picker]

Export as CSV Export as EXCEL