# IR Plan InfoPath File User Instructions (for InfoPath 2013)

Office of Institutional Planning & Analysis

August 2023

# InfoPath Information

> InfoPath file is in XML code and requires Microsoft **InfoPath Filler 2013** to open the document.

> Microsoft InfoPath 2013 software is free with Office 365 ProPlus subscription.

> The filename has an extension of ".xml" and the convention of naming the IR Plan InfoPath file is

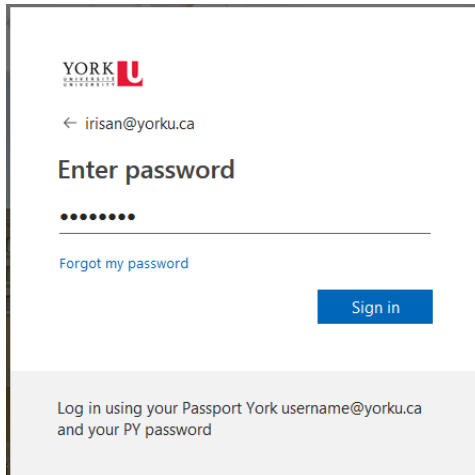- year_unit ID-IRP-Division-Unit Name-Plan ID
  - eg.

2022_U100_IRP-DivisionofthePresident-DivisionofthePresident-1431.xml

**For assistance with InfoPath installation / use, please contact**

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# Install InfoPath 2013 from Office 365 Portal

1. Go to: portal.office.com.
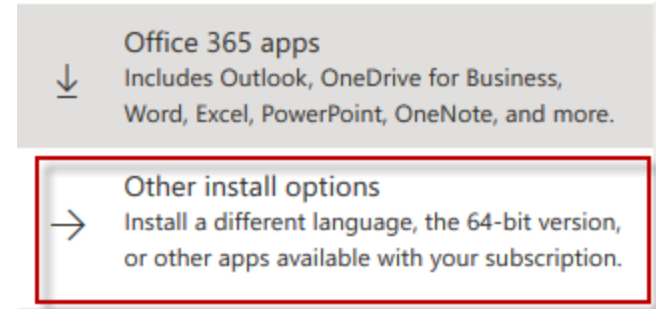2. Sign in using your Passport York credentials.



3. On the portal dashboard, click



4. Next, click "Other install options".



5. On the Software page, click "Tools & add-ins".

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# Install InfoPath 2013 from Office 365 Portal (cont.)

6. In the section of InfoPath 2013, click "Download and install".

InfoPath 2013

Use InfoPath 2013 to design sophisticated electronic forms that help you

Download and install

7. In the Download Centre, click "Download".

InfoPath 2013 for Office 365 ProPlus Subscription

*Important!* Selecting a language below will dynamically change the complete page content to that language.

Select Language: English    **Download**

8. Choose the installation file for **the 32 bit OS** to download.

☐ **File Name**

☐ infopath_4753-1001_x64_en-us.exe    *for 64 bit OS*
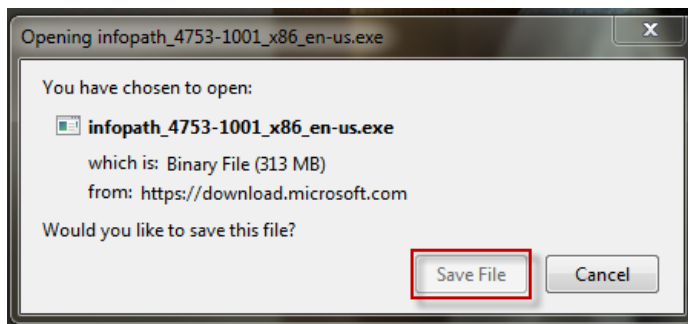
☐ infopath_4753-1001_x86_en-us.exe    *for 32 bit OS*

9. Click Next.

Next

10. Save the file to your hard disk.

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# Install InfoPath 2013 from Office 365 Portal (cont.)

11. Click "Save File" to download the file to your hard disk.



12. Click ⬇ to show the download. Click folder icon 📁 to open the containing folder.
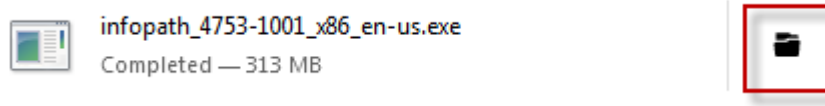


13. Double-click the infopath_4753-1001_x86_en-us.exe file to start the Setup program.

14. Follow the instructions on the screen to complete the installation.

15. Click "Install Now".

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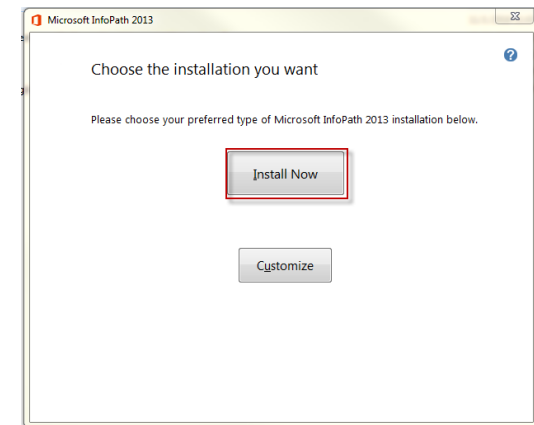
# Install InfoPath 2013 from Office 365 Portal (cont.)

16. It will take a few minutes to install.
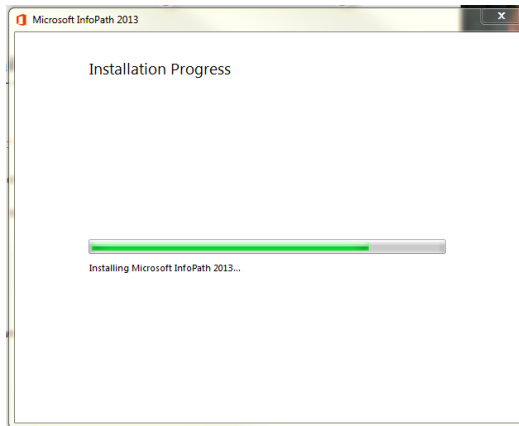


17. Click "Close" to complete the installation.
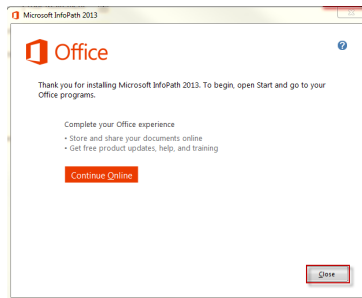


18. Click the button, and search "InfoPath". If "InfoPath Filler 2013" shows in the results then you have successfully installed InfoPath 2013.

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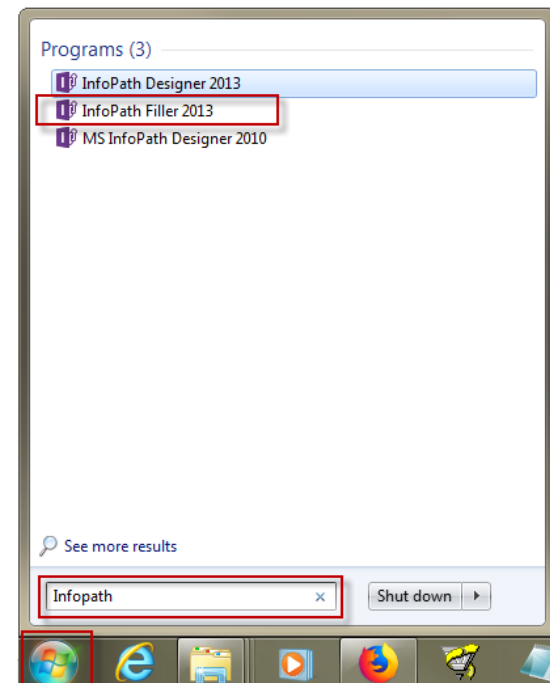
# Accessing Microsoft InfoPath 2013

## *System Requirement*
### *InfoPath 2013*

> Navigate to InfoPath from the Start Menu:
- Search "InfoPath"
- InfoPath Filler 2013

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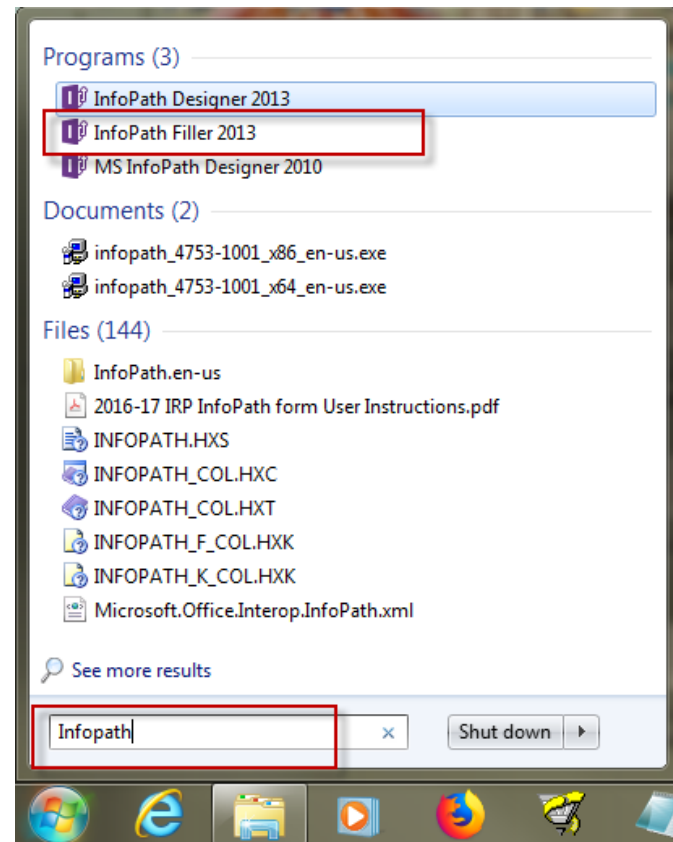
## Loading the IR Plan InfoPath File

> Browse to the location that you saved the IR Plan file. The file is a XML document. Select the file and click "Open".
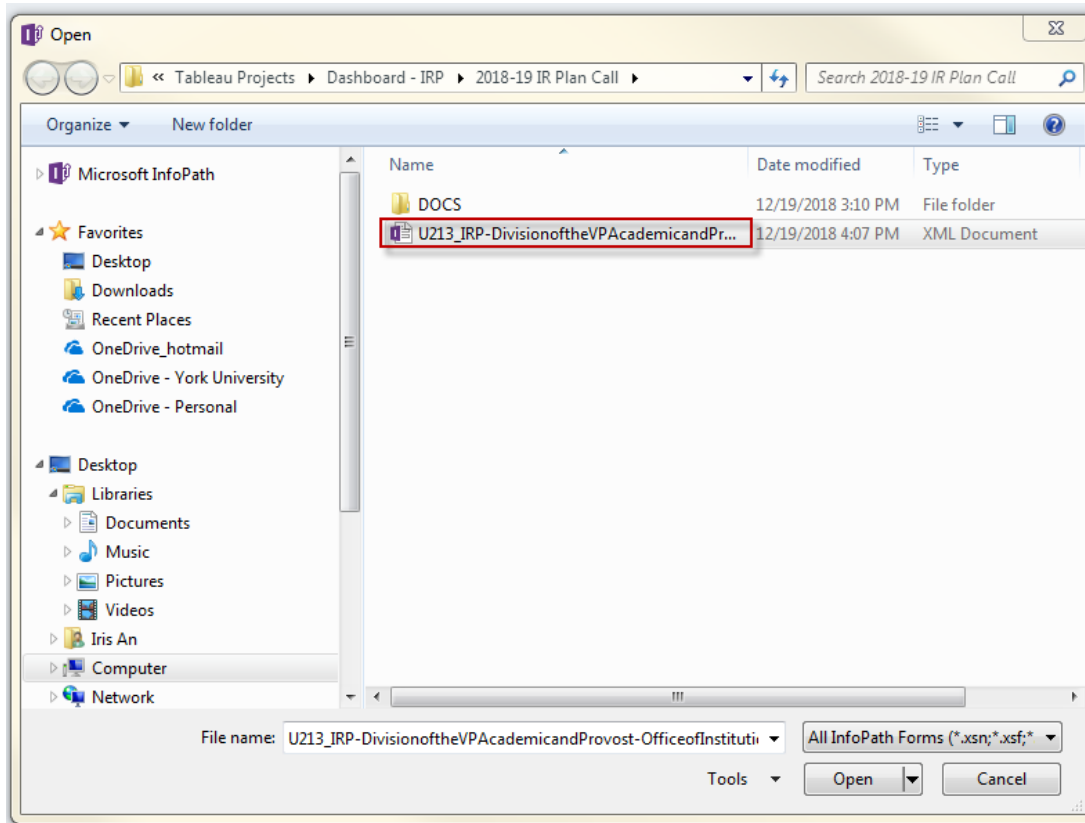
## Loading the IR Plan InfoPath File (cont.)

❯ Click "OK" to accept the security certificate.
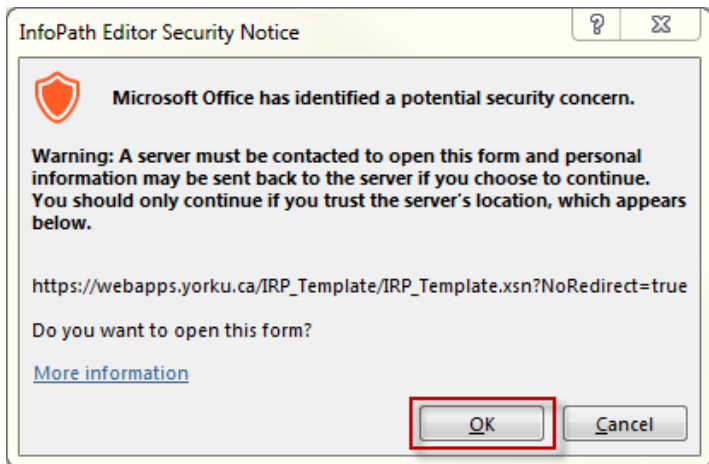


❯ Then "Cancel" on insert smart card.
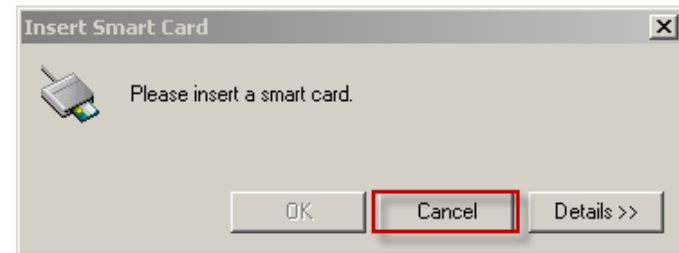


❯ Then click "Open" to open the IR plan.
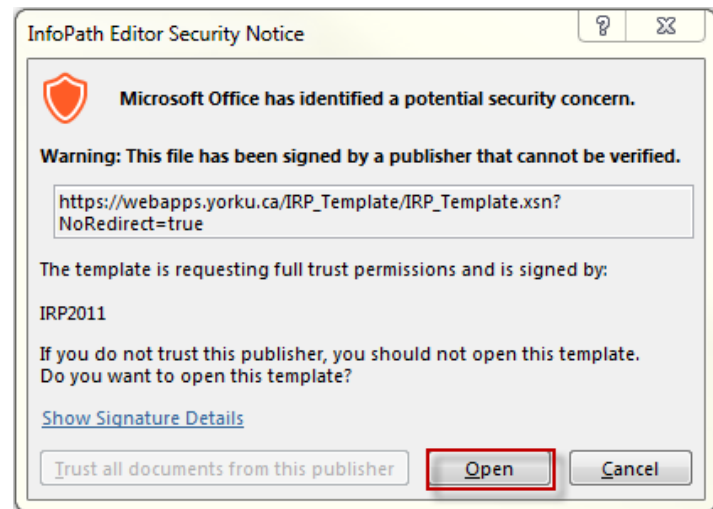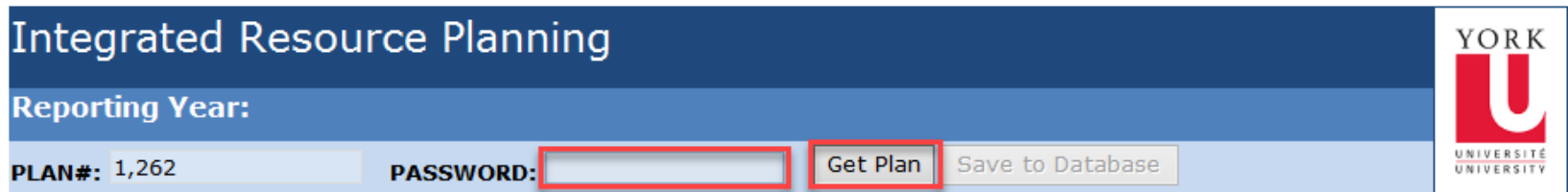


***Note:***
*You need internet access to be able to go through this authentication step.*

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# Retrieving your Plan from the Database

❯ Retrieving your Plan from the Database:
- Click "Planning Form" under the "Current View" field.
- Type the password in the "PASSWORD" field. (password is provided in the email with the IRP InfoPath file).
- Click "Get Plan" icon.



**Note:**

❯Every Division/Faculty/Unit will have its own PLAN#.

❯For security reason, planners will need to enter the password to save and retrieve plan data from the central database.

❯Get plan will retrieve the latest plan that's saved to the database. The message "Retrieved IR plan dated xx/xx/xxxx from the database!" presents the successful retrieval of the IR Plan.

❯Planners will need to save and then get the plan to/from the database for the auto numbering to take effect.

# Reviewing the Framework

❯ **The Framework section of the IR Plan Template are structured to reflect the University's Mission, Vision, UAP 2020-2025 Priorities and Core Deliverables.**

❯ The **Framework section** consists of the following fields:

1. **MISSION** - field content is York's Mission.

2. **VISION** - field content is York's Vision.

3. **PRIORITIES** - field content is a summarized version of the UAP 2020-25 six prioritie.s

4. **OUTCOMES** - field content includes longer-term outcomes and identifies the SMA metrics.

5. **PLANNING CONTEXT** - field content includes institutional planning context from the UAP 2020-2025.

6. **PROMISE** - field content includes the York Brand Promise and is anchored by the UAP priorities – NEW*

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*Note:*

❯*The 2020-21 IR Plan InfoPath Template has been aligned with the 2020-25 UAP to assist planners in connecting local activities with university priorities.*

❯*Edit text like it is a word document.*

❯*Division, Unit and Unit ID information are database driven and cannot be changed by users.*

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# Reviewing the Framework (cont.)

> Mission

MISSION:

**York's Mission**

The mission of York University is the pursuit, preservation, and dissemination of knowledge. We promise excellence in research and teaching in pure, applied and professional fields. We test the boundaries and structures of knowledge. We cultivate the critical intellect.

York University is part of Toronto: we are dynamic, metropolitan and multi-cultural. York University is part of Canada: we encourage bilingual study, we value diversity. York University is open to the world: we explore global concerns.

A community of faculty, students, staff, alumni and volunteers committed to academic freedom, social justice, accessible education, and collegial self-governance, York University makes innovation its tradition.

Tentanda Via: The way must be tried.

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# Reviewing the Framework (cont.)

> Vision

VISION:

**Vision and Values**
**Vision**
To provide a broad sociodemographic of students access to a high quality, research intensive university committed to the public good.
**Core Values**
- We strive for **Excellence** in fulfilling all aspects of our mission.
- We are **Progressive**, encouraging open minded inquiry, innovative approaches, and forward looking solutions.
- We champion **Diversity and Inclusivity**, embracing differing perspectives, peoples, and ways of knowing, and fostering global fluencies and cross-cultural knowledges.
- We are passionate about advancing **Social Justice and Equity** through critical insight, creative problem solving, and socially responsible action.
- We uphold **Sustainability** - environmental, social, and fiscal - as a vital compass for decisions and initiatives.

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# Reviewing the Framework (cont.)

**>** Priorities

PRIORITIES:

**UAP 2020-2025 Priorities**

The UAP 2020-2025 contains six priorities for action, which are based on the University's enduring commitment to critical inquiry and the pursuit of knowledge that comes from many differing perspectives and ways of knowing. The six priorities are:

1. 21st Century Learning: Diversifying Whom, What, and How We Teach
2. Knowledge for the Future: From Creation to Application
3. From Access to Success: Next Generation Student Supports
4. Advancing Global Engagement
5. Working in Partnership
6. Living Well Together

In addition to the six foundational Priorities above, the plan responds with a challenge to elevate York's contributions to the **United Nations Sustainable Development Goals (SDGs),** which offer a framework for UN member countries to take urgent action in 17 areas that are critical to ensure peace and prosperity for people and the planet. York University's new UAP serves as a rallying call for students, faculty and staff – a call to bring their expertise from across disciplines to work together to build new tools, develop strategies and solutions to global challenges.

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# Reviewing the Framework (cont.)

**❯** Outcomes

**OUTCOMES:**

**Realizing York's Vision**
To achieve our priorities as set out in our UAP (and related plans) and fulfill our commitments, requires us to regularly evaluate our progress using metrics such as those articulated in the SMA. This will move us towards successfully realizing longer term outcomes as noted below.
- Globally educated graduates prepared for success in a changing world
- Amplified scholarship, research, creative activities and innovation/Knowledge Mobilization maximum societal impact
- Enriching collaboration through elevated community engagement and internationalization

**SMA3 Metrics**
1. Graduate Employment Rate in a Related Field
2. Institutional Strength/Focus
3. Graduation Rate
4. Community/Local Impact
5. Institution-Specific (Economic Impact)
6. Research Funding & Capacity: Federal Tri-Agency Funding Secured
7. Experiential Learning
8. Research Revenue Attracted from Private Sector Sources
9. Graduate Employment Earnings
10. Skills & Competencies

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# Reviewing the Framework (cont.)

› Planning Context

**PLANNING CONTEXT:**

**Institutional Planning Context from UAP 2020-2025**
Our new UAP is designed to uphold the fundamental values of the University, even as we evolve our roles and reach to ensure our graduates are equipped for a future that will be defined by dramatic change.
- Climate and environmental change raise urgent questions for virtually every field of endeavour and a need to come up with innovative solutions.
- Digital inter-connectivity and physical mobility of people generate complexity but also immense possibilities to accelerate collaboration and problem solving.
- Technology is simultaneously enabling, enhancing, and disrupting every sphere of life and work, as well as revolutionizing how we all learn, think, and create.
- Global power shifts translate into local tensions and inequities, highlighting the need for meaningful strategies to enhance international cooperation, economic inclusion, and social cohesion.
- The ethical and moral imperatives of social movements—such as #MeToo, #BlackLivesMatter, among others - need to inform our policies and direction as an academic community and as a force for good in the world.

**Link to University Academic Plan 2020-2025**

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# Reviewing the Framework (cont.)

> Promise

- *The "PROMISE" field is new to the 2020-21 IR Plan Framework section. This section is the result of the Branding process completed in 2019-2020. The York Brand Differentiation Strategy outlines our distinctive identity as a University and our shared promise in terms of how people will feel and what they will gain from interacting with us. Divisional leads must include Brand Strategic Imperatives in their plans thus ensuring the strategies are embedded in Divisions/Faculties and units IR Plans*

PROMISE:

**Promise and Differentiation**
At York, we have a shared sense of purpose and identity that differentiates us from other post secondary institutions.

We are a community of change makers. Driven by passion, we are committed to creating POSITIVE CHANGE for our students, our communities, and the world around us.

When people interact with York they come away feeling: welcomed, proud, cared about, confident, inspired, empowered.

They should also recognize that the positive benefits York University provides are:
- Exceptionally diverse community that works together to tackle complex societal challenges
- Purposeful research that advances knowledge and creates positive change
- Highly valued educational experience that prepares students for meaningful careers and long-term success
- Supportive, inclusive and caring environment that promotes personal growth and well-being
- Effective organization that embraces collaboration, new ideas and a strong sense of purpose

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# Developing Action Plan

❯ The Action Plan section is pre-populated with the University's UAP 2020-25 Priorities. Planners use this section to outline the strategies and actions associated with moving forward their objectives associated with each UAP priority and the York SDG Challenge.

❯ Each Objective can be supported by one or more action/strategy/initiative.

❯ Objectives, actions, and measures should be developed with outcome-based results having clear milestones and measures with the expectation that resources will be aligned with those activities.

❯ Planners will also receive their evaluated 2019-20 Plans to help inform their 2020-25 IR Plan development.

❯ Planners are expected to align local level strategies to the UAP priorities and York SDG Challenge as follows:

1. 21st Century Learning: Diversifying Whom, What, and How We Teach
2. Knowledge for the Future: From Creation to Application
3. From Access to Success: Next Generation Student Supports
4. Advancing Global Engagement
5. Working in Partnership
6. Living Well Together
7. Answering the Call

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# Developing Action Plan (cont.)

> 1. 21st Century Learning

| Priority: | 1. 21st Century Learning |
|---|---|
| Priority Detail: | Every York University graduate, regardless of background or field of study, must be equipped with the knowledge, transferable skills, and values to navigate a 21st century world in which change is the only constant.<br><br>**Initiatives noted in the UAP aligned with this priority include:**<br>• make York a more attractive destination for all potential students, including Indigenous students and equity seeking groups<br>• growth and diversification of our international student body<br>• reinvent our programs to address emerging issues and labour market needs<br>• decolonizing curriculum and ensuring our graduates are known for their global mindset<br>• build essential 21st century skills into our programs<br>• offer a wider range of credentials and flexible delivery options<br>• providing every student with an experiential learning opportunity<br>• create more physical and virtual capacity for active and collaborative learning<br>• encourage students to become lifelong learners<br>• enhance and update teaching and professional development supports for all instructors |

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# Developing Action Plan (cont.)

❯ 2. Knowledge for the Future

| | |
|---|---|
| **Priority:** | 2. Knowledge for the Future |
| **Priority Detail:** | As change accelerates around us, York University aims to be more responsive to its communities by generating critical knowledge and works of art, ideas and innovations that engage multiple perspectives while propelling Ontario as a global knowledge-economy leader.<br><br>**Initiatives noted in the UAP aligned with this priority include:**<br>• increasing the research participation of faculty and trainees at all levels across the institution<br>• growth in the number and diversity of our scholarly and artistic outputs and research funding base<br>• broadening and deepening our external partnerships and engagement<br>• fully implementing our Open Access Policy (2019)<br>• building on the success of Innovation York to expand student, faculty, and community access to entrepreneurial programming and to increase our innovation activities |

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# Developing Action Plan (cont.)

❯ 3. From Access to Success

| Priority: | 3. From Access to Success |
|---|---|
| Priority Detail: | With many of the University's students facing current challenges and uncertain futures, York will devote additional attention to supporting students of all backgrounds and circumstances to complete their studies successfully and to realize their full potentials.<br><br>**Initiatives noted in the UAP aligned with this priority include:**<br>• reliable access to excellent academic and career advising<br>• use of data analytics to enable proactive, early interventions for students<br>• more robust resources to assist international students with their distinctive needs<br>• achievement of our Faculty Complement Renewal Strategy<br>• enhanced opportunities for learning about Indigenous worldviews and the history of Canada vis-à-vis Indigenous peoples<br>• track our progress on improving outcomes for all of our students and especially those from underrepresented groups |

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# Developing Action Plan (cont.)

❯ 4. Advancing Global Engagement

| Priority: | 4. Advancing Global Engagement |
|---|---|
| Priority Detail: | York University draws people from around the world who seek to learn from each other and to gain the global fluencies needed to work locally and across borders toward a better future.<br><br>**Initiatives noted in the UAP aligned with this priority include:**<br>• global outlook and fluency informing curricula and global learning<br>• research attracting international scholars and support international collaborative research<br>• recruit international students from a multitude of countries<br>• communicate more actively, cultivating new partnerships, and fostering alumni connectivity |

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# Developing Action Plan (cont.)

❯ 5. Working in Partnership

| Priority: | 5. Working in Partnership |
|---|---|
| Priority Detail: | York University understands that by partnering with other entities and sectors it gains vital insights and capacity to create positive impact for its students, campuses, and broader communities. <br><br> **Initiatives noted in the UAP aligned with this priority include:** <br> • an integrated, interdisciplinary health precinct that will serve the needs of a growing region, while creating synergies for health-related research, teaching, and innovation <br> • establish a UN-sponsored CIFAL1 centre to provide cross-sectoral training and development programs that will advance the UN SDGs <br> • attract partners to help realize the potential of our Keele campus Lands for Learning <br> • implement York University's social procurement policy <br> • strengthen the Indigenous presence on campus <br> • connect our entrepreneurship and innovation activities to the broader innovation ecosystem of Ontario |

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# Developing Action Plan (cont.)

❯ 6. Living Well Together

| | |
|---|---|
| **Priority:** | 6. Living Well Together |
| **Priority Detail:** | Making positive change requires that all members of the University's diverse community feel welcomed into a sense of belonging, common purpose, and shared responsibility to support and enrich each other's work. <br><br> **Initiatives noted in the UAP aligned with this priority include:** <br> • commitment to open, transparent collegial governance <br> • renew our physical environment with inspiring and humane natural and built spaces <br> • enhance our virtual presence <br> • continue to implement mental health and wellbeing strategies <br> • incorporate accessibility fully into our planning <br> • actively implement the recommendations of the recently released Cromwell Report <br> • optimize our Libraries as both physical and virtual spaces <br> • draw upon our strengths in the creative and performing arts to enrich social connection and community pride <br> • support reconciliation through our Indigenous Framework, <br> • intensify our systematic efforts to embed human rights, equity, diversity, and inclusion training across the University <br> • deepen our engagement and support for our vibrant network of alumni and donors <br> • embrace a culture of service excellence |

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# Developing Action Plan (cont.)

> 7. Answering the Call

| Priority: | 7. Answering the Call |
|---|---|
| Priority Detail: | **A University-Wide Challenge to Contribute to the UN Sustainable Development Goals**. York University is already recognized as an international leader in SDG-relevant research, teaching, partnerships, and campus practices. By challenging ourselves to deepen this work over the next five years, and to track and report on our contributions, we reaffirm longstanding York values of social justice, equity, sustainability, and excellence in all that we do. This SDG Challenge will galvanize our community in coming together to engage critically with the SDGs and to take meaningful steps, both small and large, toward a more just and sustainable future.<br><br>GOAL 1: No Poverty<br>GOAL 2: Zero Hunger<br>GOAL 3: Good Health and Well-being<br>GOAL 4: Quality Education<br>GOAL 5: Gender Equality<br>GOAL 6: Clean Water and Sanitation<br>GOAL 7: Affordable and Clean Energy<br>GOAL 8: Decent Work and Economic Growth<br>GOAL 9: Industry, Innovation and Infrastructure<br>GOAL 10: Reduced Inequality<br>GOAL 11: Sustainable Cities and Communities<br>GOAL 12: Responsible Consumption and Production<br>GOAL 13: Climate Action<br>GOAL 14: Life Below Water<br>GOAL 15: Life on Land<br>GOAL 16: Peace and Justice Strong Institutions<br>GOAL 17: Partnerships to achieve the Goal |

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# Developing Action Plan (cont.)

❯ 7. Answering the Call

- In order to capture all of the activities across the University that are advancing the SDGs, we are asking all planners to use the newly added Sustainable Development Goal field of the IRP template (located in the Accountability section of the Action Plan component) to tag individual initiatives where appropriate with the SDG or SDGs to which they contribute
  - (eg, #13 for an initiative that relates to Climate Action, or #10, #17, for an initiative that contributes to both Reduced Inequalities and Partnerships for the Goals).

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# Developing Action Plan (cont.)

❯ Move local level Objectives to UAP Priorities

- Use "Priorities and Objectives" View



- Copy (from the local objective)



- Paste (to the new UAP priority)
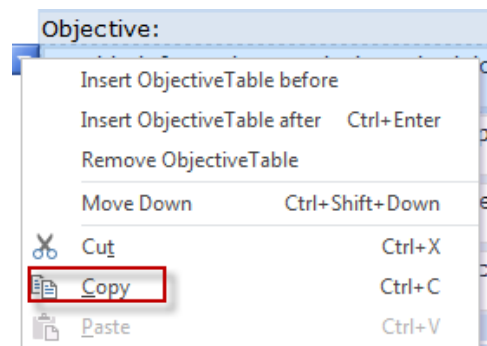


*Note:*

❯*The Best view for moving local level Objectives to UAP Priorities is the "Priorities and Objectives" and you can copy from previous IR plan and paste to the current IR plan.*

❯*Objective can be cut/copy and paste to the UAP priority one at a time.*

❯*The related actions, measurables and accountability data will be pasted accordingly.*

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# Developing Action Plan (cont.)

Action Plan – Maximizing Impact section of IR Plan allows for updates on the following fields

> Priority
> Objective
> Action/Strategy
> Measurable/Milestone
> Timeline
> Responsibility
> Comment
> Dependencies
> Sustainable Development Goal
> Evaluation Components

*Plan contents are for illustrative purpose only.*



**Note:**

> *The Best view for reviewing and updating your Action Plan – Maximizing Impact is the "Evaluation Form" View.*
> *Fields are expandable to show all texts.*
> *Supports richly formatted text. Text can be cut and pasted into the fields within the InfoPath forms.*

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# Developing Action Plan (cont.)

❯ DON'T Insert/Delete/Rank Priority
- Keep the priority content as it is
- Keep the existing order of the UAP priorities

*Plan contents are for illustrative purpose only.*
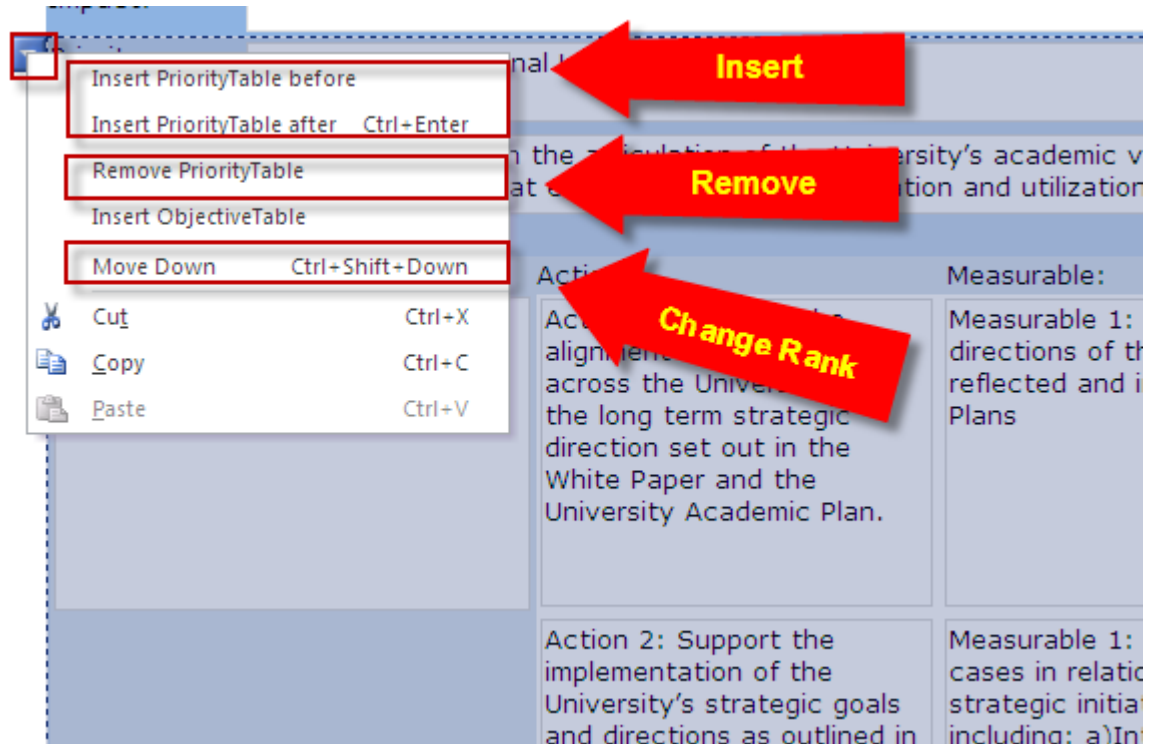


### Note:

❯*The related objectives, actions, measurables and accountability data will be inserted/removed/moved accordingly as changes made to the priorities.*

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# Developing Action Plan (cont.)

## ❯ Insert/Delete/Rank Objective

- Click drop down arrow on the upper left corner of objective field
- The shade of the affected table will become grey.

*Plan contents are for illustrative purpose only.*
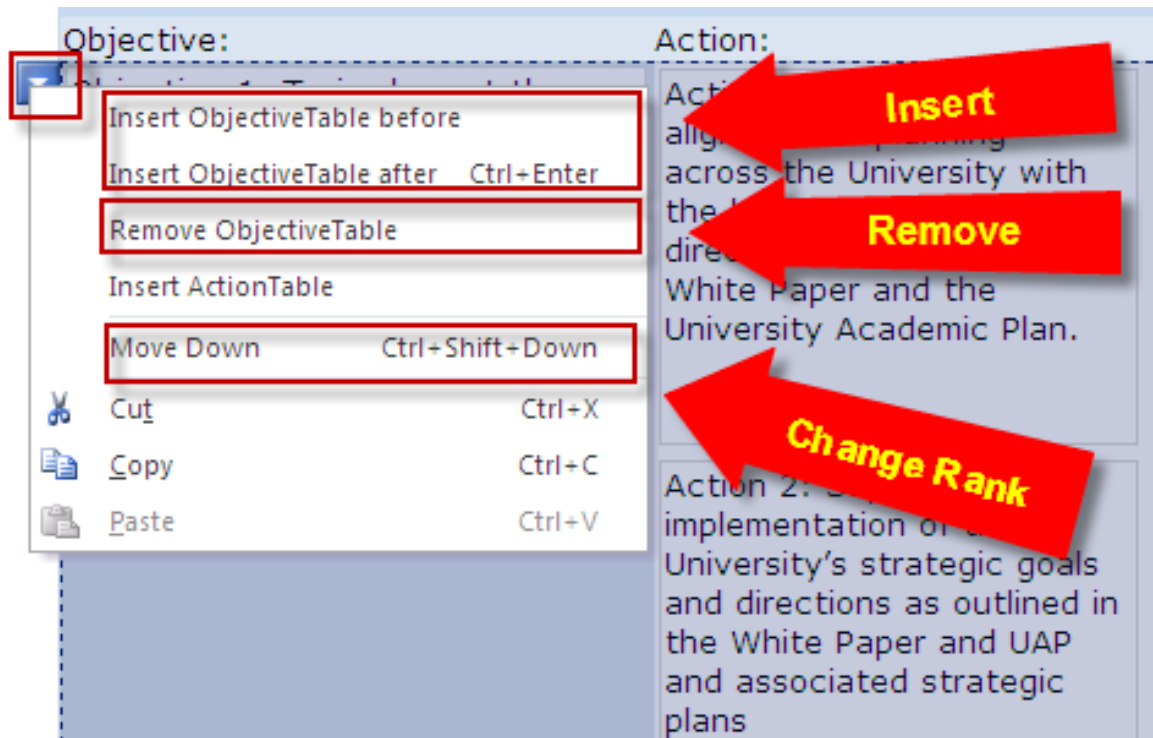


**Note:**

❯*The related actions, measurables and accountability data will be inserted/removed/moved accordingly as changes made to the objectives.*

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# Developing Action Plan (cont.)

> Insert/Delete/Rank Action
- Click drop down arrow on the upper left corner of action field
- The shade of the affected table will become grey.
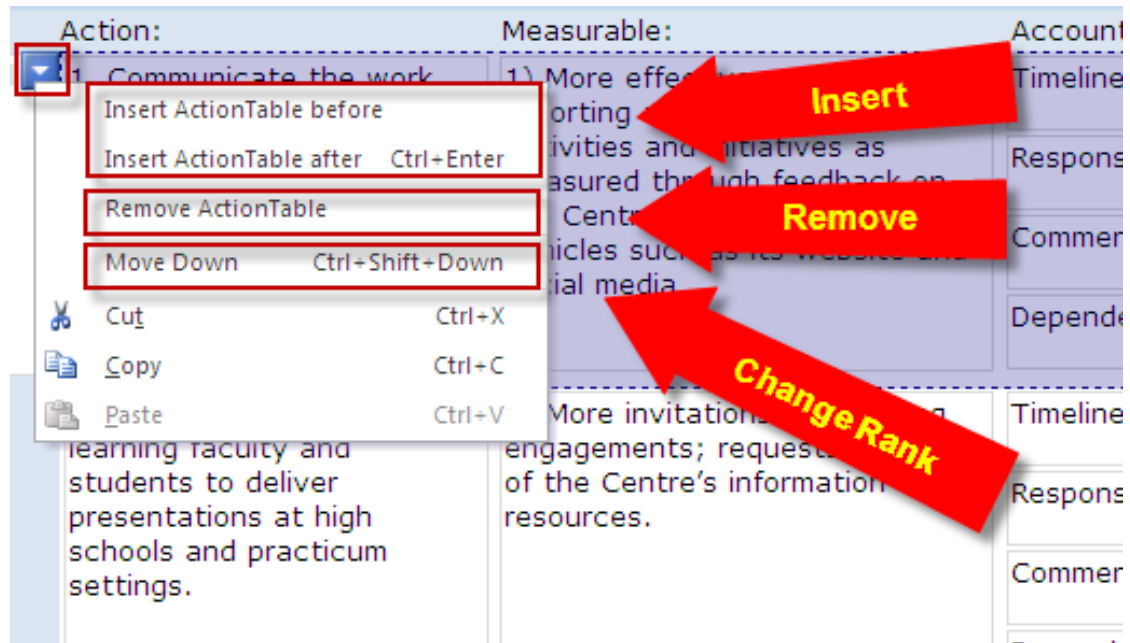


**Note:**

> The related measurables/ accountability data will be inserted/removed/moved accordingly with changes made to actions.

# Formatting the IR Plan Text

❯ Format Plan Content
- Under "Home" menu, you can edit, format and search text.
  - Clipboard
  - Font
  - Paragraph
  - Font Styles
  - Editing



**Note:**
❯ *Format text the same way as in Word.*
❯ *Formatting of the contents in one view will be reflected in the other views automatically.*
❯ *Default font for IR Plan is Verdana 10.*

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# Different IR Plan View Options - Planning

> **Change Views**
> - Click drop down arrow under "Current View" field
> - Select the view you want to view and edit.
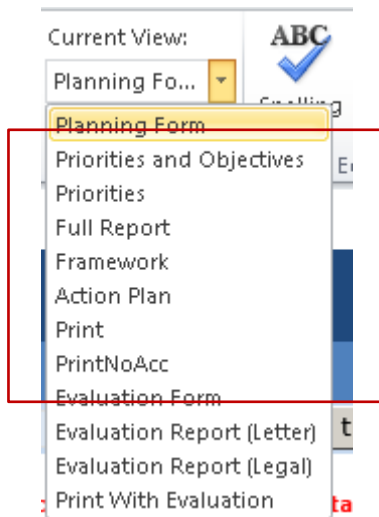


> **Different Planning Views** – NO EVALUATION COMPONENTS
> - Planning Form: retrieve plan data and save to database.
> - Priorities and Objectives: Priority, Priority Details and Objectives in landscape layout
> - Priorities: Priority and Priority Details in landscape layout
> - Full report: Includes all the plan contents in landscape layout
> - Framework: Includes Vision, Mandate, Core Function Areas, Guiding Principles, Planning Context, KPI in landscape layout
> - Action Plan: Includes Priority, Priority Details, Objective, Action, Measurable, Accountability in landscape layout
> - Print: Includes all the plan contents; has **auto numbering**, **portrait** layout; eliminate table format of action plan portion.
> - PrintNoAcc: Exclude Accountability section from the Print view, portrait layout.

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*Note:*

> *Planners can choose different IR Plan "Views" to view or edit plan information.*
> *Change of the content in one view will be automatically reflected in all the views.*

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# IR Plan Evaluation
# Views for Evaluation Purpose

> **Change Views**

- Click drop down arrow under "Current View" field.
- Select the view you need and edit.
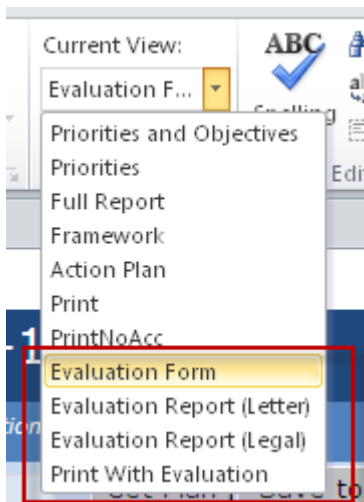


> **Views for Evaluation Purposes**

- Evaluation Form
- Evaluation Report (Letter)
- Evaluation Report (Legal)
- Print With Evaluation

***Notes:***

> *Use "Evaluation Form" to save all the changes to the central database.*

> *Use "Evaluation Report (Letter)", "Evaluation Report (Legal)" and "Print With Evaluation" to print the evaluation results. Each selection provides a different print format option.*

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# IR Plan Evaluation
# Evaluation Form

> Evaluation Form
- Use to input and edit evaluation information.
- Includes all action plan information.
- Use to save and retrieve the evaluation to the central database.

*Plan contents are for illustrative purpose only.*

| DIVISION: | UNIT ID: | UNIT: |
|---|---|---|
| Division of the VP Academic and Provost | 213 | Office of Institutional Planning & Analysis |

As part of the evaluation of your IR Plan, you will need to assess the status of each measurable action by indicating whether the action item is: not on track; progressing but behind schedule or taking different shape then originally envisaged; on track or on time relative to expectations; or completed during the planning cycle. Examples of the evaluation categories include:

✓ **Completed** - Action has been completed during the planning cycle as expected.

● **On Track** - Action is on time relative to expectations. Examples may include multi-year projects with deliverables or items expected to be finalized by year-end.

● **Progressing** - Action is moving forward but behind original timeline. Enhanced monitoring is required to ensure the action does not get further delayed. Examples may include longer-than-expected start-ups or have taken a different shape than originally thought.

● **Not on Track** - Action is unlikely to be completed within the intended timeline. Significant dialogue is required as whether to proceed with it or how to manage the risk of not completing it. Examples may include items that are no longer considered relevant, depending on other actions for completion or facing significant barriers.

✕ **Discontinued** - For various reasons, a decision has been made to no longer pursue this action at this time.

**Evaluation Category**

### ACTION PLAN – MAXIMIZING IMPACT

Priority: Academic Quality

Priority Detail: Academic quality will be achieved through objectives that include increasing our full-time faculty complement; research intensification; pedagogical innovation or initiatives to support increased program quality; and building on our existing strengths in liberal studies, fine arts and professional programs by seeking out new interdisciplinary program opportunities in health, applied sciences and professional programs. York remains committed to the eventual creation of a distinctive medical school and to expanded engineering programs that would lay the groundwork for a new School.

Objective:
Improve Quality and Integrity of full-time faculty data and analysis.

| Action/Strategy: | Measurable/Milestone: | Accountability: |
|---|---|---|
| Integrate and align York's faculty complement with its academic and strategic vision.<br><br>Develop institutional faculty complement plan that supports the university's strategic and academic priorities. | 1. Faculty Complement Plan (5 Year) completed.<br>2. Long term plan integrated with enrolment plan.<br>3. Retirement Modelling is completed. | Timeline:<br>Fall 2018<br>Responsibility:<br>IERP and Office of Vice-Provost Academic<br>Comments:<br><br>Dependencies:<br><br>Midterm Evaluation:<br>Select Midterm Status...<br><br>Annual Evaluation:<br>On Track<br> o OIPA plans to start development of |

**Evaluation Components**

## Notes:

> Fields are expandable to show all text.

> Supports richly formatted text.

> Text can be cut and pasted into InfoPath form.

> Please do not enter numbering for priority/objective/action as the auto-numbering is provided in other views.

# IR Plan Evaluation
# Evaluation Report (Letter)

> **View and Print Evaluation Status**

- Evaluation information presented at action/strategy level.
- Contains auto numbering.
- Print with letter size page in a landscape layout.
- Evaluation categories are presented in status icons.
- Provide status summary for fast track of progress.

*Plan contents are for illustrative purpose only.*



**Priority 1 :**  Academic Quality in Research and Teaching
**Objective 1 .1 :**  To implement the vision and strategic academic plan for the University

| Action / Strategies | Midterm | Annual | Evaluation overview |
|---|---|---|---|
| 1.1.1  Support the alignment of planning across the University with the long term strategic direction set out in the White Paper and the University Academic Plan. | ✖ | ✔ | Midterm evaluation overview<br>Annual evaluation overview |
| 1.1.2  Work co... Ps to support the implementation of the University's strategic goals and directions as outlined in the White Paper, UAP and associated strategic plans | ● (yellow) | ● (yellow) | Focal... ...ategies<br>May have to table reports for Fall 2012 |

**Action**

**Evaluation**

**Priority 2 :**  Community Outreach and Partnership
**Objective 2 .1 :**  Engage with internal community and other institutions and organizations to ensure that York's approach to integrated planning is informed by and informs best practice and experience.

| Action / Strategies | Midterm | Annual | Evaluation overview |
|---|---|---|---|
| 2.1.1  Learn from and share with leading practitioners and scholars by: a)Conducting research concerning best practice in integrated planning in higher education and relevant sectors. b)Participating in local, national and international discussions concerning integrated planning in higher education. | ✔ | ● (green) | Presented at CUPA with Ryerson on IRP<br>Will develop conference presentations for SCUP and/or CAUBO in fall 2012 |
| 2.1.2  Actively solicit feedback and evaluation of IRP framework and processes to inform on-going implementation. | ● (yellow) | ● (yellow) | Need to develop survey for IRP tools |

**Priority 3 :**  Valuing People and Strengthening the Workplace
**Objective 3 .1 :**  Develop the capacity of the University's workforce and support creating a Better Workplace

| Action / Strategies | Midterm | Annual | Evaluation overview |
|---|---|---|---|
| 3.1.1  Support professional development opportunities for unit staff. | ✔ | ✔ | Staff are members of relevant professional organizations and have the opportunity to attend a conference on an annual basis. |

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*Notes:*

> *Planners can use this interface to input evaluation overview comments for both midterm and annual evaluation.*

YORK U

# IR Plan Evaluation
# Evaluation Report (Legal)

> **View and Print Evaluation Status**

- Evaluation information presented at measurable/milestone level.
- Contains auto numbering.
- Print with legal size page in a landscape layout.
- Evaluation categories are presented in status icons.
- Provide status summary for fast track of progress.

*Plan contents are for illustrative purpose only.*



**Notes:**

> *Planners can use this interface to input evaluation overview comments for both midterm and annual evaluation.*

> *Printing in this view requires legal size pages.*

YORK U

# IR Plan Evaluation
## Evaluation Status Summary

> **View Evaluation Status Summary**

- Status summary is provided at the end of "Evaluation Report (Letter)" and "Evaluation Report (Legal)" views.
- Each action/strategy item is counted as 1. This view is used to track total number of actions/strategies that have been evaluated and the distribution among the evaluation categories in one page.

*Plan contents are for illustrative purpose only.*

**EVALUATION STATUS SUMMARY**

|  | | Midterm Stats | Percentage | Annual Stats | Percentage |
|---|---|---|---|---|---|
| ✓ | Completed | 3 | 10 % | 6 | 21 % |
| 🟢 | On Track | 15 | 52 % | 16 | 55 % |
| 🟡 | Progressing | 9 | 31 % | 6 | 21 % |
| 🔴 | Not on Track | 1 | 3 % | 1 | 3 % |
| ✖ | Discontinued | 1 | 3 % | 0 | 0 % |
| ⚪ | Not Evaluated | 0 | 0 % | 0 | 0 % |
| **No. of Strategies** | | 29 | 100 % | 29 | 100 % |

**Notes:**

> *Purpose of evaluation summary is to provide a snapshot of progress towards plan for planners.*

> *It is a numerical summation of each evaluation category in the IR Plan. It is not a scoring or grading system.*

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# IR Plan Evaluation
# Print With Evaluation

> **View and Print Evaluation Status**

- Contains all the IR Plan information.
- Planners can make changes and update all the fields.
- Contains auto numbering.
- Print with letter size page in a portrait layout.
- Evaluation categories are presented in text format.

*Plan contents are for illustrative purpose only.*



**Notes:**

> *Planners can use this interface to input evaluation status, evaluation overview comments for both midterm and annual evaluation.*

> *Auto numbering does not refresh until the IR Plan is saved to and retrieved from the database.*
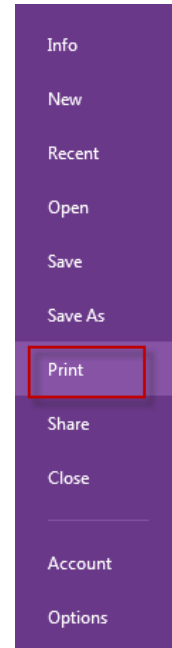
# Print

**> View Printing to PDF**

- Under any View mode, go to "File" menu and click "Print".
- The following print views contain evaluation components:
  - Evaluation Report (Letter)
  - Evaluation Report (Legal)
  - Print With Evaluation

## Notes:

**>** *Each View can be printed as what you see is what you get (WYSIWYG).*

**>** *Use "Print" icon to print the specific view of the IR plan.*

**>** *Because the print layout is set up centrally, please **do not** use the print properties to define the page layout as it will override the central setting.*

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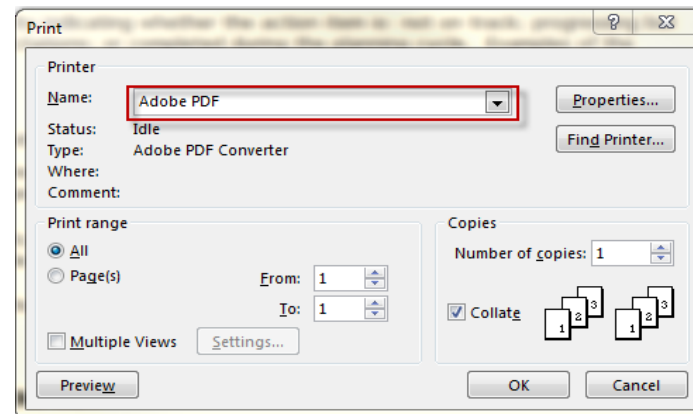
# Print (cont.)

> ## Output to Word Document
> - Select one of the following views under the "Current view"
>   - Print  (No evaluation)
>   - PrintNoAcc  (No evaluation)
>   - Print With Evaluation
> - Go to "File" menu and click "Print".
> - Select "Adobe PDF" as the name of the Printer, click OK, then the IR Plan PDF file will be generated.
> - Open the PDF,
>   - "File" menu > "Export To" > "Microsoft Word" >  "Word Document"

---
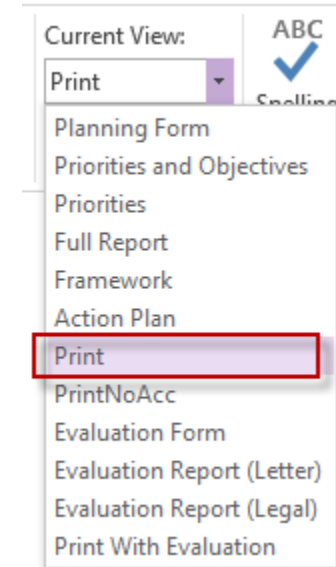
**Note:**

> *Print view has auto numbering feature that the priorities, objectives and actions will be numbered according to its sequence in the action plan.   Planners will need to save and then get the plan to/from the database for the auto numbering to take effect.*

> *Planners can print the plan into PDF document for filing purpose.  If planner needs to coordinate inputs from multiple people, word document can be generated using the above method to collect inputs and consolidate changes, however the updated contents can't be fed into InfoPath automatically.*

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# Saving your IR Plan to Local Drives

> **Save locally**
> * Click "FILE" tab.
> * Click "Save" or "Save as" under the "File" menu.
> * Choose file location.

**Note:**

> Save function is the same as saving a Word document.

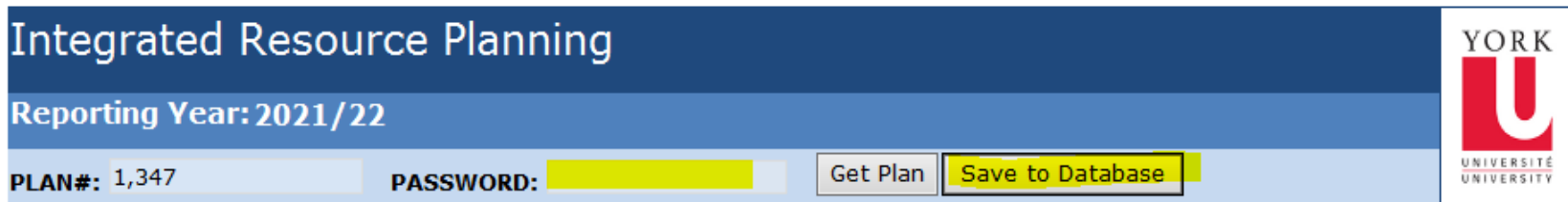> Planners can keep as many versions as they want on their own computer.

> Files can be sent to someone else for editing, as long as they have InfoPath 2013 installed on their computer.

YORK U
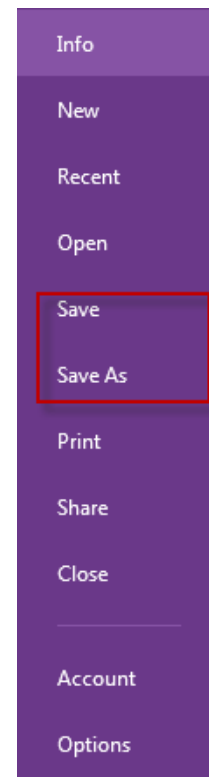
# Saving your IR Plan to the Database

❯ Saving IR Plan to the Database
  - Click "Planning Form" or "Evaluation Form" under the "Current View" field.
  - Type password in the "PASSWORD" field. (password will be provided through email).
  - Click "Save to Database" icon.



**Note:**

❯Planners can save to database to back up their IR plan in the central database. The message "Plan saved successfully on xx/xx/xxxx to the database!" presents the successful saving of the IR Plan to the database.

❯For security reason, planners will need to enter the password to save and retrieve plan data from the central database.

❯Central will archive all the versions that are saved to the database. Under special circumstance that planners delete the plan that they saved locally, OIPA Office will be able retrieve the most recent version from the database.

## Contact Information

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