

Compliance Assist Strategic Planning Quick Reference Guide Building and Monitoring a Strategic Plan

Compliance Assist is a web-based tool for documenting, tracking and reporting unit strategic planning efforts. The following is a brief step-by-step summary with video tutorials for entering/updating strategic planning efforts.

Steps for completing an annual plan for monitoring progress towards strategic goals

STEP 1: Accessing Compliance Assist

1. Use the link on OIEP's website: <http://oiep.cofc.edu/complianceassist/index.php> (Google Chrome is preferred)
2. Login with CofC Username and Password
3. Select Planning (to the far right)
4. Select the organizational chart button at the top left
5. Select the appropriate year (using the drop down menu)
6. Select Strategic Plan (using the drop down menu)
7. Select program/unit name using organizational chart on left

STEP 2: Entering and Updating Unit Information (Plan Items tab)

Fields included: Unit name, Strategic Planning Coordinator, Coordinator's contact information, Unit Mission, Unit Vision and Values, SWOT and Trade Offs

1. To enter new unit information, select "+Plan Item" and Unit Information
2. To update unit information, select the underlined unit name to open the unit information
3. To enter/update Strategic Planning Coordinator, starting typing the coordinator's last name in the text box and then select the user and appropriate title
4. To enter/update Coordinator's email, phone, and office address; enter information into appropriate text fields
5. To enter/update mission statement, visions, and values, enter the information into the appropriate text boxes
6. To enter/update a SWOT analysis and related tradeoffs, enter the information in each of the appropriate text fields
7. To assign an appropriate date range, adjust the years in the Start and End fields:
 - a. Unit Information should span the entire Strategic Planning timeframe (typically 5 years)

Watch a brief instructional video [here](#).

STEP 3: Entering and Updating Unit Goals (Plan Items tab)

Fields included: Goal Number, Goal Title, Goal Statement, and Progress

1. To enter a new goal, select New Item and Unit Goal
2. To update an existing goal, select the underlined goal name to open the goal
3. To enter/update a goal statement, enter/update the goal statement
4. To assign an appropriate date range, adjust the years in the Start and End fields:
 - a. Unit Goals should span the entire Strategic Planning timeframe (typically 5 years)
5. Use the Progress field drop-down box to indicate current status of goals

Watch a brief video [here](#)

STEP 4: Entering and Updating Unit Outcomes (Plan Items tab)

Fields included: Outcome Number, Outcome Title, Outcome Statement, Measures, Targets and Deadlines, Strategies, Budget Requests Justification/Description, Number of Lines Requested, Non-Recurring Budget Requests, Recurring Budget Requests, Progress

1. To enter a new unit outcome, select "+Plan Item" and Unit Outcome, provide an outcome number and title
2. To update an existing unit outcome, select the underlined unit outcome name to open the outcome
3. To enter/update an outcome statement, enter/update the outcome statement
4. To enter/update measures, enter/update the measures in the appropriate text box
5. To add supporting documentation, use "+File" or "+Folder", browse to find the file(s), select your file, select Upload File
6. To enter/update targets and deadlines, enter/update the targets/deadlines in the appropriate text box
7. To enter/update strategies, enter/update the strategies in the appropriate text box
8. To enter/update budget information, enter/update the information in the appropriate text boxes

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- a. As appropriate, enter number of lines requested, non-recurring, and recurring budget requests
 - b. At the end of the reporting period, provide updates on what budget items were received/spent
9. At the end of the reporting period, enter the results and impact in the appropriate text box
10. To assign an appropriate date range, adjust the years in the Start and End fields:
 - a. Unit Outcomes will typically be updated annually
11. Select the Progress status from the drop-down list at the bottom of the page

Watch a brief video [here](#).

STEP 5: Relating Unit Goals to College Strategic Initiatives

1. Open an existing unit goal by selecting the underlined goal name
2. Select the Related tab at the top right within unit goal
3. Select "+Supports" for the Supports (Connected Up)
4. Ensure that the drop down box at the far left is set to strategic plan and that the College of Charleston is selected from the organizational chart below
5. Select the blue plus boxes for the appropriate College strategic initiatives (will switch to green check when successfully selected)
6. Select the "Back to Plan Item" button on the bottom right to return the unit goal
7. Select the back arrow or the "Done" button to go back to your dashboard view
8. Complete these steps for each unit goal

Watch a brief video [here](#).

STEP 6: Relating Unit Outcomes to Unit Goals

1. Open an existing unit outcome by selecting the underlined unit outcome name
2. Select the Related tab at the top right within unit outcome
3. Select "+Supports" for the Supports (Connected Up)
4. Ensure that the drop down box at the far left is set to strategic plan and that your unit is selected from the organizational chart below
5. Select the blue plus boxes for the appropriate unit goals (will switch to green check when successfully selected)
6. Select the "Back to Plan Item" button on the bottom right to return the unit outcome
7. Select the back arrow or the "Done" button to go back to your dashboard view
8. Complete these steps for each unit outcome

Watch a brief video [here](#).