



HELP GUIDE – HOW TO ENTER YOUR THREE-YEAR PLANS IN DIAMOND

This Help Guide will walk you through how to add your Three-Year Plans to Diamond. If you have any questions, please email planning@otc.edu.

STEP 1 – LOGIN TO DIAMOND

- The website is otcc.strategicplanningonline.com
- Your username and password are the same as your Ozarks Tech username and password.

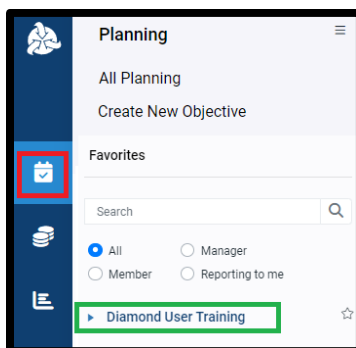
STEP 2 – SELECT THE “2026-2027 (Current)” PLANNING YEAR

- In the upper right corner, ensure the **Planning Year** is **2026-2027 (Current)**.

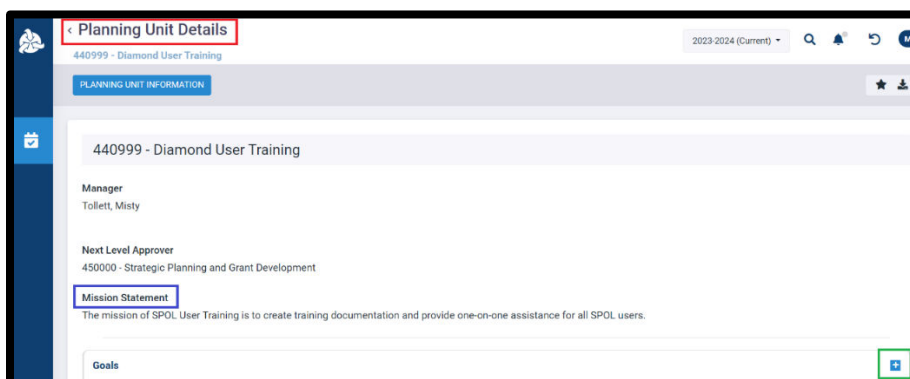


STEP 3 – ENTER YOUR THREE-YEAR PLAN INFORMATION

- A. Click on the **Planning Icon** on the left menu.
- B. Click your **Program/Department** name.



- C. The **Planning Unit Details** screen will appear.
*If you need to update your **Mission Statement**, please email planning@otc.edu.*
- D. Hover over the Goals heading.
- E. Click on the **Add** icon (a blue plus sign) that appeared on the far-right side of Goals.





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- F. The **Goal Information – What do you want to accomplish?** screen will open:
1. Enter a title for your Three-Year Plan under **Goal Title**.
 2. Leave your respective program/department selected under **Planning Unit**.
 3. Leave **Leave Unchecked** unchecked.
 4. Leave the **Planning Year** as *2026-2027 (Current)*.
 5. Select the **Goal Purpose** that best fits your Three-Year Plan.
 6. Choose *In Progress* for your **Goal Status**.
 7. Enter a description of what you would like to accomplish under **Goal Description**.
 8. Click **Save** when complete.

Goal Information - What do you want to accomplish?

Goal Title: Implement Diamond for Integrated Planning

Planning Unit: 411500 - Diamond User Training – Tollell, Misty

Leave Unchecked: ☐

Planning Year: 2026-2027 (Current)

Goal Purpose: Departmental Planning

Goal Status: In Progress

Goal Description: Implement Diamond for all programs/departments who complete Integrated Plans

Cancel Save

- G. The **Goal Details** screen will open after you click Save.

< Goal Details

All Planning > 4793-DRAFT - Implement Diamond for Annual Planning

GOAL DETAILS

STEP 4 – ALIGN YOUR THREE-YEAR PLAN TO OTC’S STRATEGIC PLAN

- A. On the **Goal Details** screen, click on **How does this align with OTC’s Strategic Plan?**

< Goal Details

All Planning > 4793-DRAFT - Implement Diamond for Annual Planning

GOAL DETAILS

4793 - Implement Diamond for Annual Planning

Planning Unit: 440999 - Diamond User Training

Goal Status: In Progress

Goal Description: Implement the updated version of SPOL Diamond, for all programs/departments

How does this align with OTC’s Strategic Plan?

There are no records to display.



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- B. The **How does this align with OTC's Strategic Plan** screen will open on the right.
1. Click the **circle** next to the primary strategy your Three-Year Plan most closely aligns to. *It will automatically add the checkbox under Select as well.*
 2. You may **check** any additional initiatives if desired.
 3. Click **Save** when your selections are complete.

The screenshot shows the 'Goal Details' screen for the goal '5075 - Implement Diamond for Integrated Planning'. The modal 'How does this align with OTC's Strategic Plan?' is open on the right. It displays a table with columns: Primary, Select, Commitment, and Strategy. The 'Primary' column has a blue circle icon next to 'Institutional Excellence - Operational Excellence'. The 'Select' column has a checked checkbox next to 'Institutional Excellence - Innovation'. The 'Commitment' column has a checked checkbox next to 'Institutional Excellence - Academic Excellence'. The 'Strategy' column lists 'Academic Excellence', 'Innovation', 'Operational Excellence', 'Accessibility', 'Student Engagement', 'Student Supports', 'Career Pipeline', 'Community Engagement', and 'Workforce Development'. The 'Save' button is highlighted in orange.

- C. The **Strategic Plan Strategy (or Strategies)** you selected will appear on the Goal Details screen.

The screenshot shows the 'Goal Details' screen for the goal '5075 - Implement Diamond for Integrated Planning'. The 'How does this align with OTC's Strategic Plan?' section is highlighted with a red box. It shows the selected strategy: 'Institutional Excellence - Operational Excellence'.

STEP 5 – ENTER HOW YOU WILL COMPLETE YOUR THREE-YEAR PLAN

- A. Scroll down and hover over the **What are your steps to complete this goal?** heading. *The line will turn blue and the **add icon** (a blue plus sign) will appear on the right side.*
- B. Click the **Add** icon.

The screenshot shows the 'What are your steps to complete this goal? (List at least 3 steps)' section. The text 'What are your steps to complete this goal? (List at least 3 steps)' is highlighted with a red box. A blue plus sign icon is visible on the right side of the section.



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- C. The **Step Details** entry screen will open on the right.
1. Enter the **Anticipated Start Date**.
 2. Enter the **Anticipated Completion Date**.
 3. Choose the **Step Planning Year** this step will occur in.
 - i. Example, if your start date is 7/1/2026, you will select “A. Next Year: 2026-27” for this step.
 4. Choose your desired **Priority Level**.
 5. Choose your desired **Step Status**.
 6. The **Actual Completed Date** is optional, and you will update it in Year 2 or Year 3.
 7. Enter one of the steps you plan to take under **How will you complete this step?**
 8. Click **Save** when complete.

You may have to scroll down to see the save button depending on your screen size.

- D. You have entered your first step. It **will appear** on the Goal Details screen.
- E. If you need to add a **New Resource (Budget) Request** to this step, follow the instructions listed under Step 6 below. Otherwise, repeat steps 5A – 5D to enter your remaining steps to complete this Three-Year Plan and move to Step 7 when complete.

STEP 6 – ADD NEW RESOURCE (BUDGET) REQUESTS, IF NEEDED

- A. Click on the step you would like to add your New Resource (Budget) Request to open it.
- The **Step Details** entry screen will open on the right.*
1. Click on Budget
 2. The only date option will be **2026-2027**. It is ok to leave it as this, even if your resource request will be for a future year.
 3. Click on the **add icon** (a blue plus sign).



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B. The **New Resource Request** screen will appear.

1. Select the **Budget Account** and **GL Code** for your request and click **Next**.

2. A screen will appear where you will include additional details about your request:

- i. Select your desired **Priority Level**.
- ii. Enter a brief one-line **Description** about your request.
- iii. Select the **Budget Fiscal Year** of your request.
- iv. Select if your request **Has Ongoing Cost** or is **Connected to Another Budget Request**.
- v. Enter the **Quantity**, **Cost Per Item**, and **Total Price** of your request.
- vi. Enter the following information in the Justification box:
 1. Why you need the item (be descriptive as possible).
 2. Dollar amount for any estimated ongoing costs.
 3. Impacts the request may have on items such as water, electrical, ADA compliance, etc.
 4. Perkins/Enhancement Requests: Include room number and instructor.
- vii. Click **Save** when complete.



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- C. Your **completed request** will appear on the screen. You may click the **X** in the upper right to return to the Goal Details screen.

Budget Detail

Step Details **Budget**

2026-2027

Account: 10-614000-00 - STRATEGIC PLANNING
OL Code: 00013 - Ongoing Operational Budget Expansion
Priority: Medium
Description: Type a brief description here.

	Qty:	CPU:	Total:
Requested Values:	1	\$1,000.00	\$1,000.00
Approved Values:	0	\$0.00	\$0.00

- D. If you have additional resource requests to add for this Step, repeat items A-C. Otherwise, move back to Step 5 to enter your next Step or move on to Step 7 below.

STEP 7 – SELECT ANY PROGRAMS/DEPARTMENTS YOU NEED ASSISTANCE FROM FOR YOUR THREE-YEAR PLAN (OPTIONAL)

- A. Scroll down and hover over the **What other programs/departments do you need assistance from?** heading.

*The line will turn blue and the **add icon** (a blue plus sign) will appear on the right side.*

- B. Click the **Add** icon.

What other programs/departments do you need assistance from?

There are no records to display.

- C. The **What other programs/departments do you need assistance from?** screen will open on the right.

1. **Check** any areas you need direct assistance from to complete your Three-Year Plan.

You do not need to select your own program/department.

2. Click **Save** when your selections are complete.

You may have to scroll down to see the save button depending on your screen size.

What are your steps to complete this goal? (List at least 3 steps)

Redesign 3-5 core Integrated Planning materials (e.g., guides, templates, tip sheets) using plain language and improved visuals. Develop accompanying short video explainers.

Anticipated Start Date	Anticipated Completion Date	Step Planning Year	Priority Level	Step Status	Budget Request	Approved
01/11/2027	05/31/2027	A. Next Year: 2026-27	Medium	In Progress	\$0.00	\$0.00

Collect feedback from Diamond users and Planning Unit leads to identify needs and pain points in current materials.

Anticipated Start Date	Anticipated Completion Date	Step Planning Year	Priority Level	Step Status	Budget Request	Approved
07/01/2026	12/11/2026	A. Next Year: 2026-27	Medium	In Progress	\$1,500.00	\$0.00

What other programs/departments do you need assistance from?

08/25/2025 411000 - Strategic Planning and Grant Development Holden, Cate

What would success look like and how would you measure it?

08/25/2025 Redesigned materials are in active use and seen as helpful across departments. At least 80% of surveyed users report improved clarity and ease of use. Usage tracking shows consistent access to guides and videos during key planning periods. Materials are updated and promoted ahead of the FY30 cycle.

What other programs/departments do you need assistance from?

Planning Unit:

Select Planning Units

- ☐ Republic Education Center
- ☐ Research and Governmental Affairs
- ☐ Respiratory Therapy - AAS
- ☐ Respiratory Therapy - BS
- ☐ Richwood Valley Campus
- ☐ Safety and Security
- ☐ Sonography
- ☒ Strategic Planning and Grant Development
- ☐ Student Account Services
- ☐ Student Affairs

Cancel Save



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- F. The programs/departments you selected **will appear** on the Goal Details screen.

Anticipated Start Date	Anticipated Completion Date	Step Planning Year	Priority Level	Step Status	Budget Request	Approved
07/01/2026	12/11/2026	A. Next Year: 2026-27	Medium	In Progress	\$1,500.00	\$0.00

What other programs/departments do you need assistance from?

08/25/2025	411000 - Strategic Planning and Grant Development					Holden, Calie
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STEP 8 – ENTER WHAT SUCCESS WOULD LOOK LIKE AND HOW YOU WILL MEASURE IT

- A. Scroll down and find “**What would success look like and how would you measure it?**”
- B. Hover over the “**What would success look like...**” heading.
*The line will turn blue and the **add icon** (a blue plus sign) will appear on the right side.*
- C. Click the **Add** icon.

What other programs/departments do you need assistance from?

08/25/2025	411000 - Strategic Planning and Grant Development					Holden, Calie
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What would success look like and how would you measure it?

- G. The “**What would success look like...**” entry screen will open on the right.
1. You may leave the **Date** as the current date or change if you would like.
 2. Leave the **Planning Year** as **2026-2027 – Current**.
 3. Under **Description**, enter your “What would success look like...” information.
 4. Click **Save**.
- You may have to scroll down to see the save button depending on your screen size.*

What would success look like and how would you measure it?

Date: 8/25/2025 Planning Year: 2026-2027 - (Current)

Description:

Redesigned materials are in active use and seen as helpful across departments. At least 80% of surveyed users report improved clarity and ease of use. Usage tracking shows consistent access to guides and videos during key planning periods. Materials are updated and promoted ahead of the FY30 cycle.

Cancel Save

Your Three-Year Plan has now been entered.

Repeat Steps 3-8 to enter each additional Three-Year Plan.

Note – in the past we had you submit the goal for approval. You will not do that at this point.

You will submit the goals after your Peer Review meeting.