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OPERATIONAL ASSESSMENT HANDBOOK

THE OFFICE OF INSTITUTIONAL EFFECTIVENESS

BOOK ISSUED
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CREATED BY
The IE Assessment Team

MAINTAINING THE MISSION

THE NEED & OUR MISSION

One of the greatest challenges facing higher education today is the ability to demonstrate the quality of the education provided. Institutional effectiveness in both curricular and co-curricular areas is vital to the success of every university. This pressing challenge for accountability, effectiveness, and change has brought assessment and both strategic and budget planning into the forefront of the administrative lives of higher education.

Institutional Effectiveness (IE) has become a discipline that helps protect the institution from veering away from its mission and goals. An effectiveness program focuses on educational programs, administrative support services, academic and student support services, facilities management and services, and community/public service. It holds these areas accountable to their purposes and objectives. By doing so, the IE Office and the various curricular and co-curricular departments jointly maintain the mission of Liberty University to develop Christ-centered men and women with the values, knowledge, and skills essential to impact the world.

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PURPOSE OF THE HANDBOOK

"Assessment." ***What comes to mind when you read that word?***

Tests and quizzes? Time-consuming busywork? Confusion and uncertainty? A necessary evil? Just one more (slightly pointless?) thing to take care of in the midst of an already overwhelming list of to-dos? Or, do you view assessment as an opportunity to find out strategic information, catch problems, think innovatively, make improvements, and track progress?

If you are like most people, your attitude towards assessment falls somewhere on a broad spectrum of perceptions about assessment. You may land in a neutral position where you can see some benefit, but you are not excited about it, or you may, if we're being honest, have a more negative point of view. Though there are a variety of reasons why people view assessment this way, including poor previous experiences, two of the most prominent deterrents are: 1) lack of time, and 2) lack of knowledge and training that are readily accessible.

To help alleviate these challenges here at Liberty, the Office of Institutional Effectiveness developed the *Operational Assessment Handbook.* The aim of this handbook is to provide foundational instructions and information for how to do assessment in a format that is easy to access, understand, and implement. By providing these instructions and resources, we hope to accomplish the following:

- Streamline the assessment process so it is more manageable and easier to integrate,
- Provide a solution for the deficit in knowledge and training in the area of assessment,
- Give guidance for how to measure areas that matter,
- Bridge the gap between assessment and everyday decision-making, and lastly,
- Strengthen compliance through the regular evaluation of valuable areas and implementation of critical improvements.

SUMMARY OF HANDBOOK.

To accomplish this purpose, we divided the handbook into the following sections:

SECTION 1 WHAT YOU NEED TO KNOW

In this section, we present a brief overview of the basics of assessment and why it is important. This information will form the foundation of your understanding of assessment and the assessment process and is critical for equipping you to create assessments that matter to you, your department, and the University.

SECTION 2 WHAT YOU NEED TO DO

This section is the "who, what, when, where, why, and how" of the assessment process and is designed to give you the information and instructions you need to create, submit, and implement assessments for your department. If you want to cut to the chase and get down to it, this is the section you will want to use.

SECTION 3 ADDITIONAL RESOURCES

Within the first two sections, we reference various terms, templates and additional resources. This last section includes some of those resources: Frequently Asked Questions, Terms to Know, and links to templates and contact and deadline information.

Completing the tasks necessary to keep a university as large as Liberty running can be a daunting endeavor. Trying to ensure the good quality and continuous improvement of those same tasks can be even more intimidating. We hope that by following the instructions and utilizing the resources in this handbook, you will be encouraged in your efforts and better equipped to efficiently and effectively support the University's mission for the long haul.

THE IE ASSESSMENT TEAM

WHAT YOU NEED TO KNOW

During the fall of 2016, a new initiative began which sought to streamline the co-curricular assessment process for all departments across the University with three primary goals: compliance, value, and simplicity.

COMPLIANCE

As an academic institution, it is in our best interest academically and financially to be accredited by a regional accreditor. Liberty is accredited by the Southern Association of Colleges and Schools Commission on Colleges (SACSCOC). Therefore, in accordance with the expectations of SACSCOC and best practices in assessment, every department needs to regularly collect and analyze data, make improvements, and then evaluate the effectiveness of those improvements. For co-curricular departments, this process includes administrative, academic, and student support services (SACSCOC R7.3 and R8.2C). Additionally, SACSCOC is looking for evidence of a culture of assessment and improvement, not just a few random examples before a compliance report. According to assessment best practices, this type of culture does not mean targets need to be met every time, but when a target is not met, actions are taken to make improvements and reassess to see if the changes produced the desired effect. Through the simple system presented in this manual, the data needed to demonstrate compliance with SACSCOC will come about naturally.

VALUE

Departments make decisions from data they collect on an ongoing basis, including key performance indicators (KPIs), usage data, budget evaluations, and other means. They also often have strategic initiatives for which they would like to begin collecting data. A well-designed assessment system naturally supports these decisions and initiatives by providing the type of data needed to justify budgetary requests, resource allocations, and other important components of departmental initiatives. We often find, however, that there is a gap between departments implementing decisions and then intentionally reassessing to ensure those decisions are truly producing the desired results. In order to bridge the gap and facilitate a strong and beneficial assessment process, discussions often need to take place to outline priorities and place them within the assessment framework. By having conversations and learning about departments through the assessment process described in this handbook, departments can design assessments that capture valuable data for reliable and consistent improvement decisions that strengthen departmental functionality, make services more meaningful and effective, and show evidence of what they are already doing as opposed to just doing something for accreditation purposes.

SIMPLICITY

One of the biggest barriers to successfully implementing any new process is lack of time; therefore, it is important to keep the assessment process simple. A signature mark of the model presented in this manual is simplicity. A simpler assessment process with more intentional discussions around the results can have a far greater impact than a more complex and time-consuming process because it ensures that those involved are not overburdened and can devote the resources needed to draw meaningful conclusions from the data they collect. We consider it best practice to orient assessments around the key initiatives already taking place across the University and to use the data to support the acquisition of the resources needed to carry out those initiatives. Additionally, this framework is designed to grow as needed to represent larger and more complex divisions of the University where further data is desired. Our hope is that you will find the resources in this handbook simple to use and helpful for further informing the decision-making processes already in place within your department.

What is Assessment, and why do we do it?

Assessment is defined as the ongoing process by which a department "identifies expected outcomes, assesses the extent to which it achieves those outcomes, and provides evidence of seeking improvement based on analysis of the results" (SACSCOC R8.2C). A culture of improvement is the end goal of all assessment and initiatives. It is no longer enough to simply use data to make informed decisions; we must now take that extra step of reassessing to ensure that actions taken to improve are effective.

So, what do we assess in a higher education institution? We assess the quality of our effectiveness and efficiency in fulfilling our mission and goals. Although the focus during the initial stages of the assessment movement was on student learning outcomes, in recent times the emphasis has broadened to all areas of the institution, both curricular and co-curricular. Ultimately, a well-designed assessment process produces data that fosters meaningful conversations about ways to improve curriculum and services so the University can most effectively and efficiently achieve its goals and fulfill its mission.

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WHAT YOU NEED TO KNOW

CO-CURRICULAR OUTCOMES

As mentioned earlier, assessment is the ongoing process by which a department "identifies expected outcomes, assesses the extent to which it achieves those outcomes, and provides evidence of improvement based on analysis of the results" (SACSCOC R8.2). For co-curricular units across the University, each department has one prescribed goal and two supporting outcomes that must be assessed every year (see figure).

GOAL:
Efficient and Effective Operations Leading to Stakeholder Satisfaction

The department will evidence efficient and effective operations and adequate facilities and resources that lead to stakeholder satisfaction.

OUTCOME: Efficient and Effective Operations and Facilities	**OUTCOME: Stakeholder Satisfaction**
The department will support efficient and effective operations through maintaining adequate internal processes, physical facilities, and technological resources.	The department will maintain high levels of stakeholder satisfaction.

How each of these outcomes are assessed each year may vary, but both need to be assessed annually.

Assessments for these outcomes will be stored under the respective department within the Planning module in our reporting software, Compliance Assist. Instructions about how to develop an assessment design and input it into Planning are provided in subsequent sections.

NOTE: Though the annual assessment of these two outcomes is required, your department may choose to conduct additional assessments as needed or desired. Supplemental assessments could include the following:

- Assessments that provide additional support to either of the primary outcomes (operations/satisfaction).
- Outcomes distinct from the operations and satisfaction outcomes that you would like to regularly assess.
- Unique or one-time departmental assessments.

If there are other initiatives within your department you would like to assess and track in Planning, please contact your IE facilitator and they will assist you.

WHAT YOU NEED TO KNOW

DESIGNING A DEPARTMENTAL OUTCOME ASSESSMENT

To design an assessment, each department will need to complete the Departmental Outcome Assessment Template provided by the IE office (Departmental Outcome Assessment Template); one assessment design is needed for each outcome. Assessment plans for both the operations and satisfaction outcomes must include the following parts:

DEPARTMENT OUTCOME: OPERATIONS OR SATISFACTION

ASSESSMENT MEASURE

Objective of the Assessment

Participants or Data Source(s)

Instrument

Administration of the Assessment

ACHIEVEMENT TARGET

FINDING

ACTION PLAN (as needed)

Each of these parts needs to be completed by your department and submitted to and reviewed by IE according to the deadlines for each academic year. The outcome, measure, and target are due first, typically in mid to late fall. After the assessment is carried out, the findings are submitted at the end of the fiscal year, along with any action plans, if applicable.

Guidance for completing each portion of the assessment design is provided in the following sections. For clarification, generic examples showing what is expected for common types of assessments are included after each section description.

OUTCOME TO BE ASSESSED

First, determine and designate which outcome you will assess. From the dropdown menu under the *Department Outcome to Be Assessed* field in the template, specify which of the two standard departmental outcomes (either *Operations* or *Stakeholder Satisfaction*) for which you would like to design an assessment.

- The measures for your assessments will be varied, but the default wording for the two standard outcomes your assessment supports will remain the same.

- If you have a unique outcome for your department, choose *Other* and type the outcome into the text field below the dropdown. (Reminder: Selecting *Other* is not required and would be in addition to the standard outcomes.)

THE ASSESSMENT MEASURE

Second, determine and describe the various aspects of the assessment measure. The assessment measure includes the four sections below and covers the critical components of who, what, when, where, why, and how you will assess. In this section, you will choose an important function or component of your department to assess and provide any relevant logistical details for implementing the assessment and reporting the results.

Objective of the Assessment

The objective designates the focus of your assessment, helps ensure that the assessment aligns with the outcome, and provides valuable information. For this reason, a clear and well-developed objective is critical to the validity and quality of the assessment.

What do I need to do?

Give one to two sentences explaining what you would like to learn through the assessment, why it is important, and how it relates to the above outcome.

- NOTE: Try to stay away from measuring whether or not something has or has not been completed and, instead, aim to measure *how* that item, once implemented, has or has not been efficient or effective and/or *if* stakeholders are or are not satisfied with it.

What do I need to include?

Operational Efficiency/Effectiveness Assessment

- This outcome covers a vast majority of the functions your department carries out on a regular basis; however, you may use your assessment as an opportunity to examine an area within your department's operations more closely. Choose a process, facility, piece of technology or equipment, key performance indicator (KPI), or other area of importance to measure for efficiency or effectiveness.

- If you want to measure the *quality* of one of these items, usage or participation may not provide conclusive information. An assessment that ties into the stakeholder satisfaction outcome would most likely be more appropriate.

Stakeholder Satisfaction Assessment

- This outcome relates to how satisfied stakeholders are with the services, facilities, resources, or technology your department provides. Assessments for this outcome are often carried out by conducting a survey or focus group, which give you an opportunity to discover perceptions about your department.

- Many departments find value in syncing their satisfaction assessment with one of the operational assessments above to round out information about a particular service. By doing so, departments gain data about the efficiency or effectiveness of a service as well as how satisfied the end users are with it.

What does an example look like?

Operational Efficiency/Effectiveness

1. *Objective Example 1:* The purpose of this assessment is to find out if stakeholders are using facility X (or service X) enough to ensure there is an adequate return on investment. If there is a sufficient return on investment, then we can be sure that resources are being efficiently and effectively utilized.

2. *Objective Example 2:* The aim of this assessment is to determine if we are completing service X (or task X) within an efficient enough timeframe to be beneficial. If we find that it is beneficial, then we will know that we are meeting expectations in this area.

Stakeholder Satisfaction

1. *Objective Example:* The purpose of this assessment is to find out how satisfied stakeholders are with service X (or facility/resource/technology X). If a majority of stakeholders are satisfied, then we will know that we are adequately meeting their need.

Participants or Data Source(s)

What do I need to do?

Describe the source(s) of data the department will be measuring. Please include who/what will be measured, how many people/items, and what criteria is being used to select them (as applicable).

What do I need to include?

Operational Efficiency and Effectiveness Assessment

- When carrying out this assessment, your data will most likely be from different types of sources. For example, your sources might include values pulled from a database, number of units produced, number of students who used a service, etc.

Stakeholder Satisfaction Assessment

- When carrying out this assessment, you will most likely use actual people as your participants.

What does an example look like?

Operational Efficiency/Effectiveness

- *Description of Participants or Data:* We will use records from database X to carry out this assessment. The records will be of all stakeholders that used facility/service X (or completed task X) during time period Y.
- *Explanation of Why the Data is Critical to the Objective:* The records will show how many stakeholders are using facility/service X (or completing task X) during desired timeframe Y. This information will provide the necessary numerical data to determine if facility/service X (or task X) is being adequately utilized/completed.
- *Estimated Sample Size (if applicable):* #### of units (if this assessment has a determined number).

Stakeholder Satisfaction

- *Description of Participants or Data:* We will be using X (specified student group, employees, other departments, etc.) as the participants for this assessment.
- *Explanation of Why the Data is Critical to the Objective:* These participants are the primary users/completers of facility/service/task X; therefore, their feedback is the most critical to determining if their needs are being met.
- *Estimated Sample Size (if applicable):* #### participants (Make sure to include whether or not this is all participants or a limited selection.)

Instrument

What do I need to do?

Describe the tool or means you will use to collect data about the objective.

What do I need to include?

Operational Efficiency and Effectiveness Assessment

- For some assessments, a very specific item or reporting system may be identified as the instrument (e.g., a specific database or piece of software). When this is not the case, a description of what is going to be used to collect the data still needs to be provided. Also, if you will be using a particular program or database that is not widely known, please provide a description of what it is.

Stakeholder Satisfaction Assessment

- For most stakeholder satisfaction assessments, the instrument will be a survey or focus group. However, the IE office can help you identify other appropriate instruments to use on a case-by-case basis.

What does an example look like?

Operational Efficiency and Effectiveness

- The data will be compiled from source(s) X (database, excel spreadsheet, software program, etc.).

Stakeholder Satisfaction Example:

- The data will be collected from survey/focus group X. This survey/focus group includes questions relating to Y.

- NOTE: If you have them, it is often helpful to attach the actual survey or focus group questions to the assessment design in Planning.

Administration of the Assessment

What do I need to do?

Describe the process of how and when the data for the assessment will be collected, reviewed, and reported on. Include all logistical details necessary for carrying out the assessment and reporting the results.

What do I need to include?

Operational Efficiency and Effectiveness Assessment

- This section needs to include the steps for collecting the data, who will be involved in the process along with their responsibilities (positions only, not names), and when the assessment and review will take place.

Stakeholder Satisfaction Assessment

- This section needs to include the steps for administering the survey/focus group, who will be involved in the process along with their responsibilities (positions only, not names), and when the assessment and review will take place.

What does an example look like?

Operational Efficiency and Effectiveness

- *Description of Data Review Process:* The assessment liaison for department X will pull the data from source(s) X and review the results with key decision makers as requested.

- *When will the results be reviewed and reported:* The data will be compiled and reviewed during time period X and reported on date Y (prior to the end of the fiscal year).

Stakeholder Satisfaction Assessment

- *Description of Data Review Process:* The survey/focus group will be conducted during time period X, and results will be reviewed with key decision makers as requested after the results come in.

- *When will the results be reviewed and reported:* Results will be reviewed during time period X and reported by date Y (prior to the end of the fiscal year).

TARGET

What do I need to do?

Decide on a numerical threshold that determines if the assessment reached an adequate level (i.e., What result would indicate an adequate process, level of usage, or satisfaction?).

What do I need to include?

- The wording selected needs to allow for a clear determination of whether the target was *Met, Partially Met,* or *Not Met*.

What does an example look like?

Operational Efficiency and Effectiveness

- X number of stakeholders will use facility/service X (or complete task X) during time period Y.

Stakeholder Satisfaction

- *Survey Example*: X number/percentage or more of participants will report that they are satisfied or very satisfied with service/facility/resource/technology X.
- *Focus Group Example*: During the focus group, stakeholders will voice no more than X number of distinct complaints.

FINDING

What do I need to do?

Tell the story of how your assessment went, what the results were, whether or not you met your target, and what the results mean for your department.

What do I need to include?

- In the *Achievement* dropdown, select the option that describes your target: *Met, Partially Met, Not Met, or Not Reported.*
- In the text box, give an objective, quantitative report of your results (the actual numbers), followed by a narrative that contextualizes the findings to the target and your department. This should be written so someone outside your department, such as an external reviewer, can understand what was found through the assessment.

What does an example look like?

Operational Efficiency and Effectiveness

- X number of stakeholders used facility/service X during time period Y. This exceeded our expectations set out in our target and shows that facility/service X is providing a more than adequate return on investment. The department is satisfied with the results.

Stakeholder Satisfaction

- X% of the sample reported that they were satisfied or very satisfied with service/facility/resource/technology X, which did not quite meet the target. Historically, the department has struggled with this issue, and students have consistently voiced their dissatisfaction. Last year, we implemented a new procedure to improve the process. Stakeholders are still not quite satisfied, so an action plan will be developed to help improve satisfaction.

ACTION PLAN

What do I need to do?

Develop a plan to improve an area of operational efficiency, effectiveness, or satisfaction guided by the assessment results. This is only required if a target was not met or partially met. However, your department is welcome to design and implement an action plan for any assessment if they determine an action plan would be worthwhile.

What do I need to include?

Target Partially Met/Not Met:

- If the target was partially met or not met, develop an action plan that includes specifics about why the target was partially met or not met, what will be done to address the issue(s), and any logistics related to the action plan's implementation. Also include a rationale for why the action plan could be effective for improving the results.

Target Met:

- If the target was met, no action plan is necessary. Departments can create action plans at their own discretion.

Reassessment

- After an action plan has been implemented and a sufficient amount of time for the change to take place has passed, conduct a reassessment to evaluate whether the target has now been met or if there has been improvement.
- The reassessment design needs to be as similar to the original assessment as possible while still remaining meaningful.

Reassessment Findings

- If the reassessment target was partially met or not met, then another action plan and reassessment need to be conducted.
- If the reassessment target was met, no additional action plan is required. Report the *Evidence of Improvement* under the action plan entry.
    - The *Evidence of Improvement* is similar to a finding. Summarize what you found in the original assessment, how you developed and implemented the action plan, and how the action plan impacted the area of concern. Be sure to note specific improvements.

WHAT YOU NEED TO KNOW

DEPARTMENT ANNUAL SUMMARY

In addition to the two department outcome assessments, each department will need to complete a Department Annual Summary for the current fiscal year. The purpose of the Department Annual Summary is to provide a brief, high-level view of key developments and improvements within your department. The summary needs to include the following items/areas:

- **Executive Summary:** A brief one- or two-paragraph, general summary of the main developments, improvements, successes and/or challenges of the department for the current fiscal year. Think about the contents of this field as what you would tell the executive leadership at Liberty if you were going to give them a quick "elevator speech" about your department. Leave the more detailed information for the additional fields listed below.
- **Personnel:** Any notable changes to personnel and/or professional development opportunities for personnel within your department. Please do not mention actual names, only titles/positions. If you wish to recognize someone specifically, please feel free to do so in person or via email outside of the official report in Planning.
- **Facilities:** Any notable changes/additions/updates to your department's buildings, offices, etc.
- **Equipment:** Any notable changes/additions/updates to your department's equipment, including office supplies and/or appliances, vehicles, hardware (other than digital/technological gear and/or computers), tools, other functional gear, etc.
- **Efficiency and Effectiveness of Service:** A brief summary of your two outcome assessments, plus additional assessments, action plans, and/or reassessments with findings and evidences of improvement as applicable along with any other notable changes/improvements you would like to include about your service/operations in general.
- **Technology:** Any notable changes/additions/updates to your department's technological equipment, including computers, video screens, projectors, software programs, etc.
- **Community/Church Service:** General information about how your department as a whole, or members within your department, are involved with and serving in the community and local churches, including pastoral and lay roles, service/work days, special projects, organizational partnerships, etc. Again, please do not mention actual names, only titles/positions. If you wish to recognize someone specifically, please feel free to do so in person or via email outside of the official report in Planning.
- **Other Improvements:** The catch-all category for anything else notable within your department that has not already been covered in the previous categories.

To complete these items, you will need to fill out the Departmental Annual Summary Template provided here (Departmental Annual Summary) and then copy the information into Planning or input the information directly into Planning. To do so, please follow the instructions in the *What You Need to Do: Creating a Department Annual Summary* section.

WHAT YOU NEED TO DO

CREATING A DEPARTMENTAL OUTCOME ASSESSMENT

INPUTTING INTO THE TEMPLATE

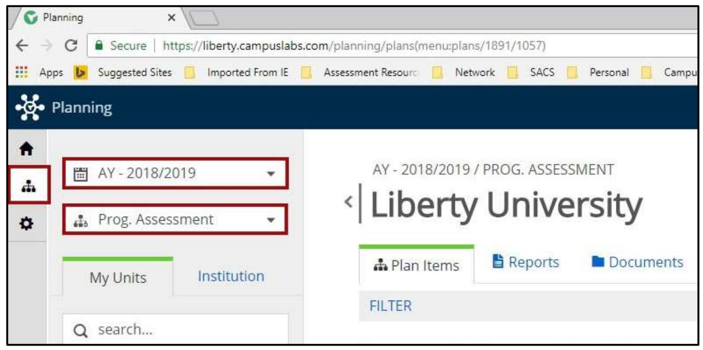
Creating a Departmental Outcome Assessment Design

- Pull up the Departmental Outcome Assessment Template
- Save the file locally, preferably one copy for each assessment you are conducting.
- For any questions regarding the contents of these fields, please refer to the previous *What You Need To Know* section.
- At the top of the template, fill in the text boxes to the right of *Division* and *Department*.
    - These should represent the department and/or the division that your department falls under.
    - If one of these does not apply, leave the field blank.
- Below these fields, there is a field titled *Academic Year*. Click on the box to the right of that field and select the academic year for which the assessment design is being created.
- Below the heading *Department Outcome to be Assessed*, select the outcome you are assessing from the dropdown menu.
    - Select *Stakeholder Satisfaction* for the satisfaction assessment or *Operational Efficiency* for the operations assessment.
    - If you have a unique outcome within your department that you are assessing, which is less common, select *other* and then type in the wording of the outcome to be assessed in the text field below the dropdown menu.
- Next, below the heading *Objective of the Assessment*, enter a one- or two-sentence description of the assessment.
- Under the *Participants or Data Source(s)* section, fill out the text box to the right of each section as applicable for the assessment you are conducting.
- Next, complete the *Instrument* section by filling out the text box to the right of *Data Collection Tool*.
- Next, complete the *Administration of the Assessment* section by filling out the two text boxes to the right of *Description of Data Review Process* and *When will the results be reviewed and reported?*
- Finally, under the *Achievement Target* section, indicate the target for the assessment.
- After every section is filled out, save this file both on your computer and on a department Molly or shared drive as appropriate for later inputting into Planning.

INPUTTING INTO PLANNING

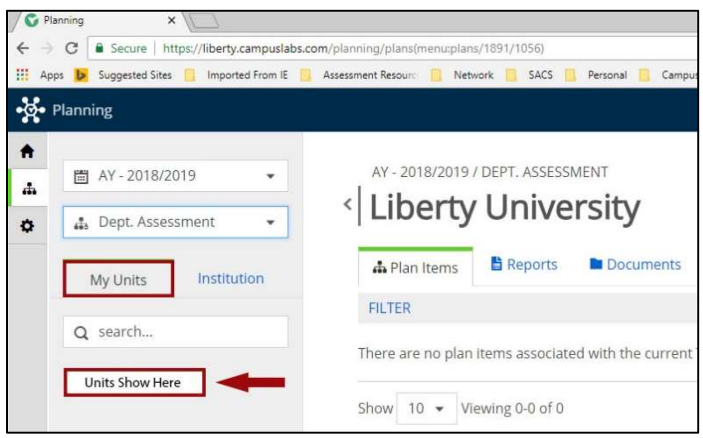
Getting Started (Video Demo)

- Go to https://liberty.campuslabs.com/planning/
- On the left side of the home page, click on the *Planning* link.
    - Depending on your permissions, you may see other links.
    - If you don't see Planning as an option, check with your IE assessment facilitator for access.
- Once in Planning, there will be three different buttons on the top-left corner. Select the *Plans* button in the middle.
    - If you are unsure which button is which, hover over the buttons with your cursor and the label will pop up.
- In the top of the left-hand column, select the academic year you would like to view.
- Below the academic year dropdown, there is another dropdown which will say *Prog. Assessment* by default. Change this to *Dept. Assessment* by clicking on the dropdown.



Finding Your Department

- Below the dropdown boxes in the left-hand column, there is an organizational tree that shows the organizational structure of the entire University. To find your department,
    - Click the *My Units* tab. You will see the division(s) or administrative unit(s) you have permission to access.
    - Click on the division or administrative unit under which your department is housed.
    - Find the desired office or department and click on the name to highlight it.
- If your department is not listed under *My Units*, do the following to find your department:
    - Click the *Institution* tab.
    - Click on *Liberty University* in the organizational tree.
    - Click on *Chancellor/President's Office*.
    - Click on *Administrative Affairs*.
    - Click on the division or administrative unit under which your department is housed.
    - Find the desired office or department and click on the name to highlight it.



Finding Your Information

Once your area is highlighted in the left-hand window, you will see a list of different items related to your department and the year selected in the center of your screen. Listed items will include the following:

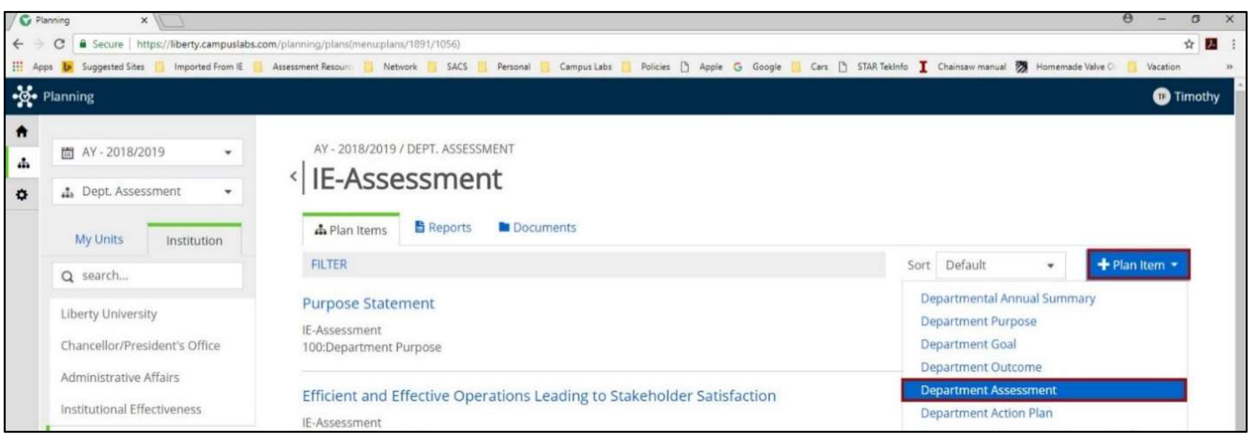
- Department Annual Summary (000)
- Purpose Statement (100)
- Goal (201)
- Effective and Efficient Operations Outcome (301)
- Stakeholder Satisfaction Outcome (302)
- Operations Assessment (401)
- Satisfaction Assessment (402)

- If you click on the name of any of these items, you will be directed to a web page with detailed information for that item.
- Most departments will primarily work with the *Operations Assessment*, the *Satisfaction Assessment*, and the *Department Annual Summary*. If you need to add an additional item not addressed here or if you have any questions, please contact your IE facilitator.
- ***Please Note: If, at any point, you click on the* Delete *button at the bottom of the page, the assessment item will be permanently erased. There is no option to restore the previous if you accidentally delete anything.***

Adding an Assessment Item to Planning

In many cases, the assessment item will be listed in the right-hand window as *Operations Assessment* with the number 401 or as *Satisfaction Assessment* with the number 402. If the assessment item is not showing, you will need to add it. To add the item, complete the following steps:

- Click on *+ Plan Item* on the top, right-hand of your screen.
- Click on *Department Assessment* in the dropdown menu.

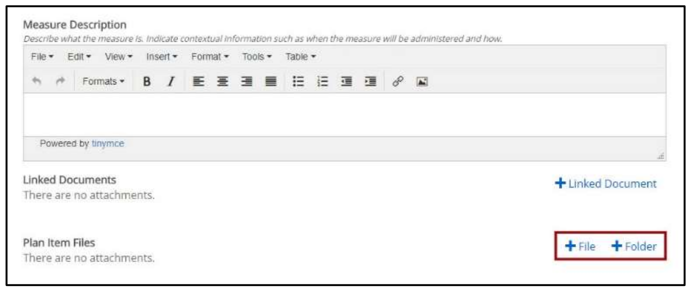


- In the *Number* field, type in the number “401” for an operations assessment or “402” for a Satisfaction assessment.
- In the *Assessment Title* field, type in “Operations Assessment” or “Satisfaction Assessment” as appropriate.
- Skip to the steps below for *Inputting the Assessment Design into Planning*.

Inputting the Assessment Design into Planning ([Video Demo])

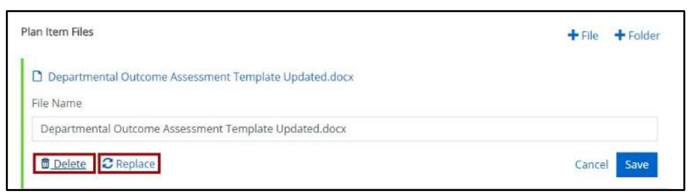
If the item is already pre-populated in the center of the page/screen, click on the name of the pre-populated assessment, 401 for Operations or 402 for Satisfaction, you want to edit. A new window listing the assessment measure fields will pop up. To edit the fields, do the following:

- Click on any of the fields and type your edits.
- Under *Measure Type*, select the appropriate option, *Direct*, *Indirect*, or *Administrative*, from the dropdown.
- Under *Measure Category*, select any appropriate category areas.
- Under *Measure Description*, click on the text box below the heading.
    - From the template you created, copy everything from *Department Outcome to Be Assessed* through *Administration of the Assessment* and paste it into the text box in the Planning window.
    - To upload supporting documentation if needed,
        - Click on the *+ File* or *+ Folder* link below the *Measure Description* area, select the files or folder you would like to upload, and click *Open*. The file(s) will be attached under *Plan Item Files*.



    - To delete or replace a file, do the following:
        - Click on the small icon with the square and pencil to the right of the file name.

        - The option to *Delete* or *Replace* will appear. Click *Delete* or *Replace* as needed.



        - A new pop-up window will ask you to confirm that you want to *Delete* or *Replace*. Click *Confirm*.
        - If deleting, no further action is needed. If replacing, follow the previous instructions for uploading documents.
- Under *Target Description*, click in the text box below the heading.
    - From the template, copy everything under the *Achievement Target* section and paste it into the text box in the Planning window.
    - To upload and/or delete supporting documentation if needed, follow the steps listed in the *Measure Description* section.

- For now, leave the *Achievement* dropdown menu, *Finding Description* text box, *Baseline Sources* text box, and *Assessment Internal Comments* text box blank.

- Towards the bottom of the form in the *Start* and *End* boxes, change the dates to correspond to the fiscal year during which the assessment is being conducted.

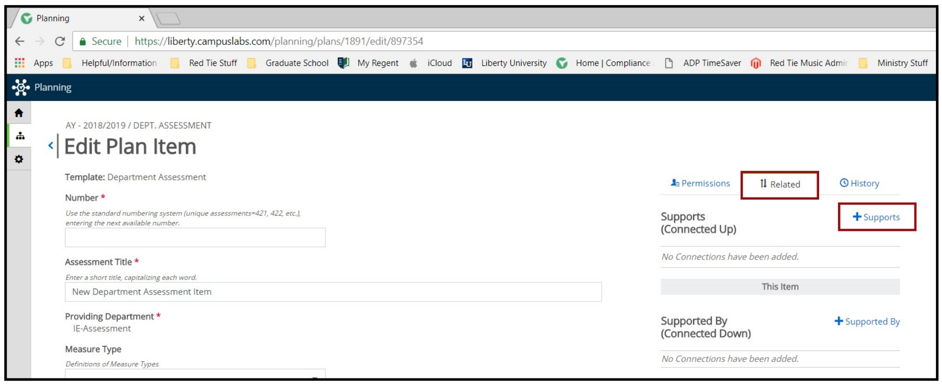
- At the very bottom of the window under *Completion of Form*, select the appropriate field from the dropdown menu.
    - If the form is completed, select *Submitted*.
    - If you have not completely filled out the form, select *Pending Submission*.

Relating Assessment Items to the Outcome

You will now need to relate the assessment item to the outcome it is measuring. To do so,

- In the top right of the window, click on the *Related* button.

- To the right of the heading *Supports (Connected Up)*, click on the *+ Supports* button. You will be directed to a new page.

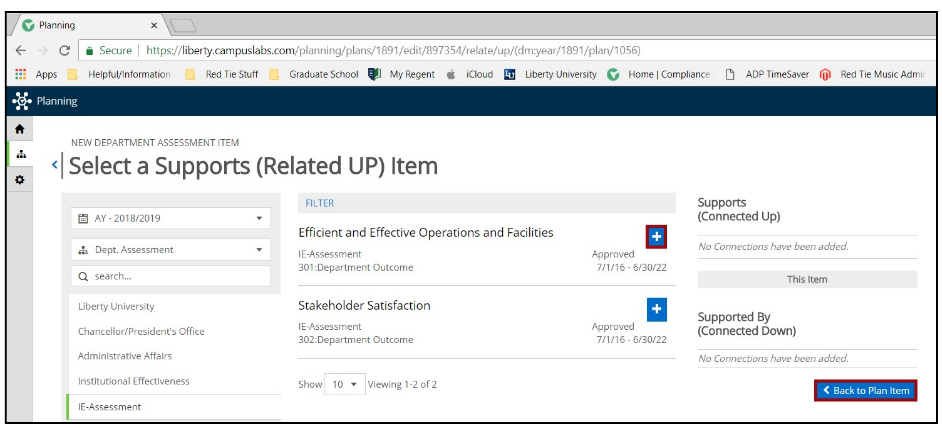


- On the left-hand side of the new page, find your department under the organizational tree again and click on it.

- Locate the outcome you are measuring and click on the blue + to the right of the title.
    - For the operations assessment, click the + next to *Efficient and Effective Operations and Facilities*.
    - For the satisfaction assessment, click the + next to *Stakeholder Satisfaction*.

- Once you are done, on the far right, click on the *Back to Plan Item* button to return to the previous screen.

- The appropriate outcome will now show under *Supports (Connected Up)* in the *Related* tab.



- Finally, to save your work and go back to the previous page, click the blue *Done* button at the bottom of the form.

Editing Assessment Items

Once your IE facilitator has notified you of any comments on the assessment design, follow the steps above on pages 19 and 20 for accessing the item; then, follow the steps below:

- Click on the name of the item you would like to edit, and you will be brought back to the edit area for that item.
- Scroll down to the *Internal Comments* heading, where comments from your IE facilitator with suggested edits for your design are located.
- To make the edits,
    - Click into and edit any of the desired fields in the design and click out of the edit box once you are done.
        - A spinning wait indicator will appear to the right of the field. Once the spinning indicator turns to a green checkmark, your edits have been saved.
    - If you would like to do so, under the *Internal Comments* heading, you may add your own feedback in response to the facilitator comments. However, do not erase the facilitator comments as they are helpful for historical information.
- If you would like to print the information, click on the *Read View* button at the bottom of the window, and you will be given a printable view.
- Once you are done with all edits, click on the blue *Done* button at the bottom of the window, and you will be returned to your area's main page.

Inputting Assessment Findings into Planning

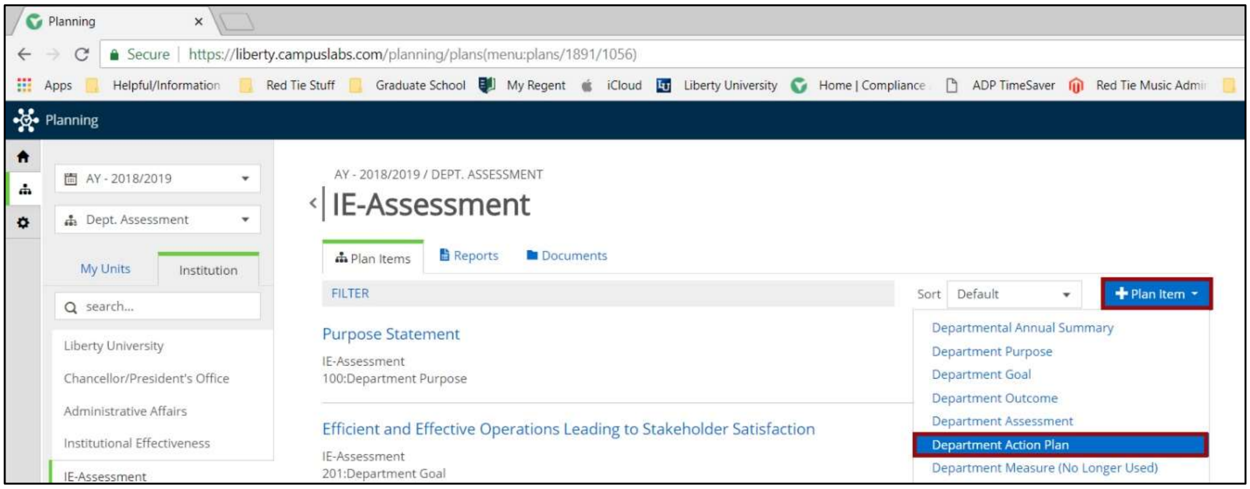
- Follow the instructions above on pages 19 and 20 for finding your assessment information.
- Click on the name of the assessment item to be edited. You will be directed to a new page with the detailed information for that item.
- Scroll down until you see the *Achievement* dropdown menu.
    - If all aspects of the target were met, select *Met*.
    - If some but not all aspects of the target were met, select *Partially Met*.
    - If no aspects of the target were met, select *Not Met*.
    - If you did not assess the outcome in the current fiscal year, select *Not Reported this AY*. **Note: This is a rare occurrence.*
- Next, locate the heading *Finding Description* below the *Achievement* item, click in the text box, and type a brief summary of results and observations from the assessment.
- Once you have completed the summary, click outside the text box in the blank white space, and it will save.
- To attach any data files to support your findings, under *Finding Description* on the assessment item, click on the *+ File* or *+ Folder* link and follow the instructions for uploading files from the previous section of instructions.
- Once the *Finding Description* is complete, you have uploaded your files, and/or made any needed edits, click *Done* at the bottom of the window to return to the previous screen.

Inputting Action Plans into Planning

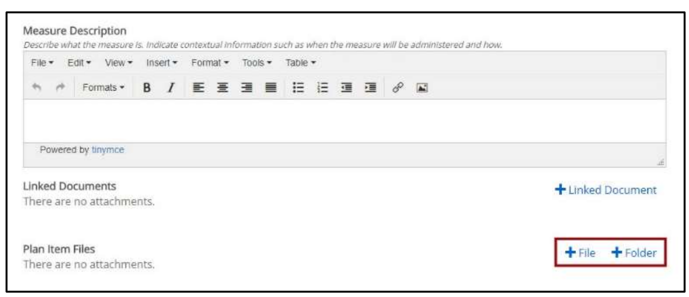
When a finding is noted as *Not Met* or *Partially Met*, an action plan must be created. Refer to the *What You Need to Know* section of this handbook for best practices in action plan design.

- Follow the instructions above for finding your department's information; then, follow the steps below.

- To add an action plan,
    - Click on *+ Plan Item* in the upper right-hand area of the window.
    - Click on *Department Action Plan* from the dropdown menu.

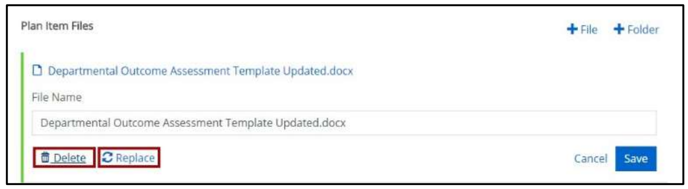


-
    - In the *Number* field, type in the number for the assessment the action plan is related to, "401" for an operations assessment or "402" for a satisfaction assessment, and add an additional decimal point.
        - For example, if the assessment was numbered "401", the action plan would be numbered "401.1".
    - In the *Title* field, type in a title that reflects the content of the action plan.
        - Example: "Operations Assessment: Increase usage of X facility"
    - Under *Description*, click on the text box below the heading. Type in the description of the action plan with all of the details outlined in the *What You Need to Know* section.
        - To upload supporting documentation if needed,
            - Click on the *+ File* or *+ Folder* link below the *Measure Description* area, select the files or folder you would like to upload, and click *Open*. The file(s) will now be attached under *Plan Item Files*.



- To delete or replace a file,
    - Click on the small icon with the square and pencil to the right of the file name.

    - The option to *Delete* or *Replace* will appear. Click *Delete* or *Replace* as needed.



    - A new pop-up window will ask you to confirm whether you want to *Delete* or *Replace*. Click *Confirm*.
    - If deleting, no further action is needed. If replacing, follow the previous instructions for uploading documents.
- Click on the text box below *Target End Date* and type in a date that reflects the end of the fiscal year for which the action plan is expected to be completed and reassessed.
- Under the *Status* heading, check the box that reflects the current state of the action plan.
- Under the *Budget Requested* heading, type in any potential budget needs for this action plan to be implemented. **Please Note: Typing something in this area does not guarantee monetary funds. The department will still need to submit a formal request through the normal departmental budgeting process.*
- Under *Additional Resources*, click on the text box and describe any additional resources needed for the action plan.
- Under *Evidence of Improvement*, there is a text box that will be left blank initially but later filled in with information once the action plan has been carried out.
- Under *Start* and *End*, confirm that the dates align with the fiscal year during which the assessment was conducted.
- If requested by your VP or Dean, under *Approval State*, select the appropriate status. The status options are listed below:
    - *Ready for Approval*,
    - *Approved by Division Head*, or
    - *Approved by VP or Dean*.
- At the very bottom of the window under *Progress*, select the appropriate field from the dropdown menu.
    - If the form is completed with all necessary information, select *Submitted*.
    - If you have not completely filled out the form, select *Pending Submission*.

- If you would like to print the information, click on the *Read View* button at the bottom of the window, and you will be given a printable view.
- Finally, to save your work and go back to the previous page, click the blue *Done* button at the bottom of the form.

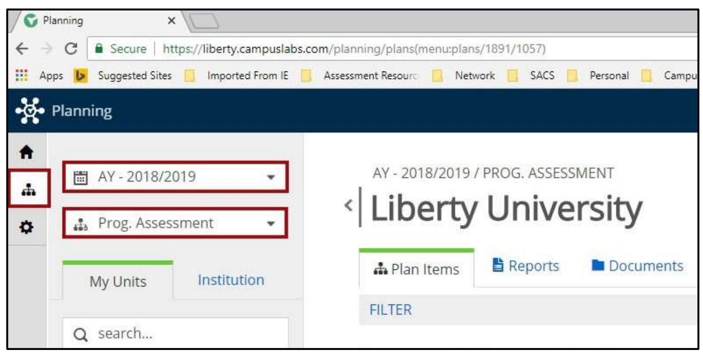
WHAT YOU NEED TO DO

CREATING A DEPARTMENT ANNUAL SUMMARY

INPUTTING INTO PLANNING

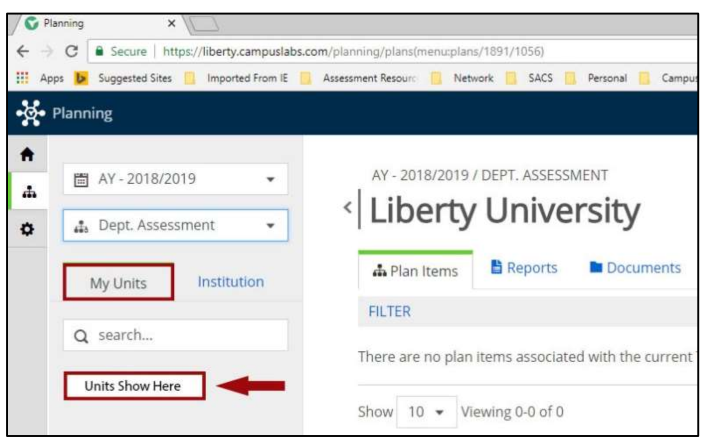
Getting Started (Video Demo)

- Go to https://liberty.campuslabs.com/planning/
- On the left side of the home page, click on the *Planning* link.
    - Depending on your permissions, you may see other links.
    - If you don't see Planning as an option, check with your IE assessment facilitator for access.
- Once in Planning, there will be three different buttons on the top-left corner. Select the *Plans* button in the middle.
    - If you are unsure which button is which, hover over the buttons with your cursor and the label will pop up.
- In the top of the left-hand column, select the academic year you would like to view.
- Below the academic year dropdown, there is another dropdown which will say *Prog. Assessment* by default. Change this to *Dept. Assessment* by clicking on the dropdown.



Finding Your Department

- Below the dropdown boxes in the left-hand column, there is an organizational tree that shows the organizational structure of the entire University. To find your department,
    - Click the *My Units* tab. You will see the division(s) or administrative unit(s) you have permission to access.
    - Click on the division or administrative unit under which your department is housed.
    - Find the desired office or department and click on the name to highlight it.



- If your department is not listed under *My Units*, do the following to find your department:
    - Click the *Institution* tab.
    - Click on *Liberty University* in the organizational tree.
    - Click on *Chancellor/President's Office*.
    - Click on *Administrative Affairs*.
    - Click on the division or administrative unit under which your department is housed.
    - Find the desired office or department and click on the name to highlight it.

Finding Your Information

Once your area is highlighted in the left-hand window, you will see a list of different items related to your department and the year selected in the center of your screen. Listed items will include the following:

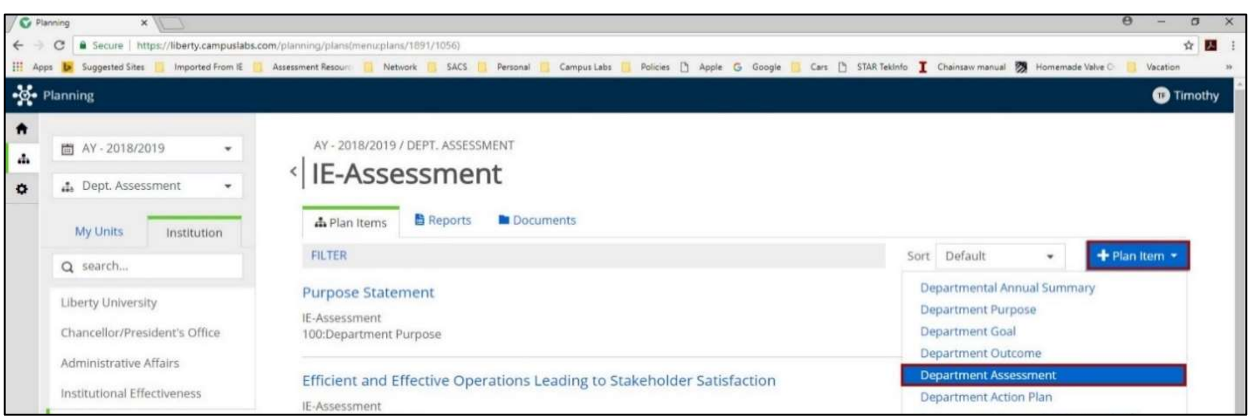
- Department Annual Summary (000)
- Purpose Statement (100)
- Goal (201)
- Effective and Efficient Operations Outcome (301)
- Stakeholder Satisfaction Outcome (302)
- Operations Assessment (401)
- Satisfaction Assessment (402)

- If you click on the name of any of these items, you will be directed to a web page with detailed information for that item.
- Most departments will primarily work with the *Operations Assessment*, the *Satisfaction Assessment*, and the *Department Annual Summary*. If you need to add an additional item not addressed here or if you have any questions, please contact your IE facilitator.
- ***Please Note: If, at any point, you click on the*** **Delete** ***button at the bottom of the page, the assessment item will be permanently erased. There is no option to restore the previous if you accidentally delete anything.***

Adding an Assessment Item to Planning

In many cases, the annual summary item will be listed in the right-hand window as *Department Annual Summary* with the number 000. If the assessment item is not showing, you will need to add it. To add the item, complete the following steps:

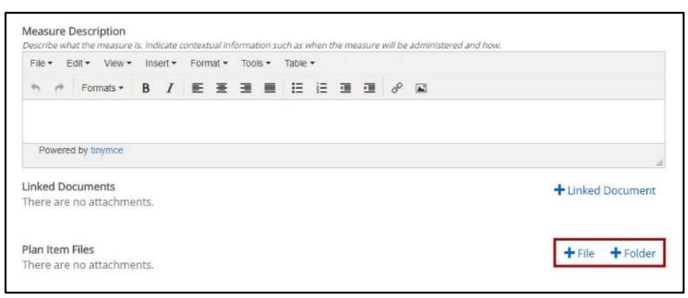
- Click on *+ Plan Item* on the top, right-hand of your screen.



- Click on *Department Annual Summary* in the dropdown menu.
- In the *Number* field, type in the number “000.”
- In the *Title* field, type in “Department Annual Summary.”
- Skip to the steps below for *Inputting the Assessment Design into Planning*.
- If the item is already pre-populated in the right hand window, then click on the name of the *Department Annual Summary* to edit. A new window listing the assessment measure fields will pop up. To edit the fields,
  - Click on any of the fields and type your edits.
  - Continue on to the *Inputting the Report into Planning* steps below.
- ***Please Note: If, at any point, you click on the* Delete *button at the bottom of the page, the assessment item will be permanently erased. There is no option to restore the previous if you accidentally delete anything.***

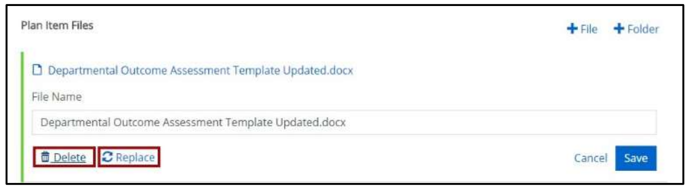
Inputting the Report into Planning

- Under each of the headings for major sections, fill in notable improvements over the past year. These sections include the following:
  - Executive Summary
  - Personnel
  - Facilities
  - Equipment
  - Efficiency and Effectiveness of Service
  - Technology
  - Community/Church Service
  - Other Improvements
- To fill in the information,
  - Click in the text box and type or paste the information.
  - Click out of the edit box once you are done.
    - A spinning wait indicator will appear to the right of the field.
    - Once the spinning indicator turns to a green checkmark, it has saved.
  - To upload supporting documentation if needed,
    - Click on the *+ File* or + Folder links below the *Measure Description* area, select the files or folder you would like to upload, and click *Open*. The file(s) will be attached under *Plan Item Files*.



- To delete or replace a file,
    - Click on the small icon with the square and pencil to the right of the file name.

    - The option to *Delete* or *Replace* will appear. Click *Delete* or *Replace* as needed.



    - A new pop-up window will ask you to confirm whether you want to *Delete* or *Replace*. Click *Confirm*.
    - If deleting, no further action is needed. If replacing, follow the previous instructions for uploading documents.

- Towards the bottom of the form, in the *Start* and *End* boxes, confirm that the dates correspond to the fiscal year for which you are reporting. You will usually create this report at the end of the fiscal year.
    - If requested by your VP or Dean, under *Approval State*, select the appropriate status. The status options are listed below:
        - *Ready for Approval*,
        - *Approved by Division Head*, or
        - *Approved by VP or Dean*.
    - At the very bottom of the window under *Progress*, select the appropriate field from the dropdown menu.
        - If the form is completed with all necessary information, select *Submitted*.
        - If you have not completely filled out the form, select *Pending Submission*.
- If you would like to print the information, click on the *Read View* button at the bottom of the window, and you will be given a printable view.
- Finally, to save your work and go back to the previous page, click the blue *Done* button at the bottom of the form.

ADDITIONAL RESOURCES

FAQS

Why do I need to do assessment?

In addition to satisfying SACS requirements, regular assessment provides a means to determine how well important business functions are operating their areas and to make any needed improvements.

Who does assessment at LU?

Every department at LU is involved in assessment. Departments on the academic side assess each of their different programs in-depth while non-academic departments assess two key areas: process improvement and satisfaction.

How can I make the assessment process more meaningful?

We recommend centering your assessment activities around metrics and initiatives that are important for the success of your department. It may also be beneficial to utilize different assessment designs and measures during subsequent years to gain new information and insights.

I want to conduct a survey. How do I do this?

Surveys are best handled through Qualtrics, a professional survey tool the University already owns. Please reach out to your IE facilitator, and he or she will walk you through the set up process.

How many assessments do I need to conduct each year?

The minimum requirement for every department is two assessments, one operational efficiency assessment and one stakeholder satisfaction assessment, per fiscal year. If your division contains three departments, you will need to do one of each assessment per department, which would result in a total of six assessments. At times, there are cases where additional assessments are appropriate, or assessments may need to be combined. Your IE facilitator can work with you on a case-by-case basis for these situations.

When do I need to conduct assessments?

Assessment data needs to be reported in the Planning system by the end of the fiscal year. Results can be posted sooner if the assessments are conducted earlier in the year.

What is an action plan, and when do I need one?

When a target is partially met or not met in an area, an action plan is created to report the steps being taken to improve that area along with a timeline and plan for reassessment of that same target after improvement efforts have had sufficient time to make an impact. Action plans are best created as a collaborative effort among any key decision makers in the department.

Who is responsible for the assessments?

Key assessment contacts will be appointed within your area by the head of your division. These individuals are responsible for ensuring that the assessments are conducted and communicating with the VP and/or IE when issues arise.

I want to find out more about assessment. What are some good resources?

Beyond the suggestions in this handbook, a quick email to your IE facilitator will result in further suggestions that are tailored to your area. Assessment and higher education organizations such as AAC&U, AALHE and NILOA also have databases that contain great suggestions.

How can I make the assessment process more efficient?

We highly suggest that you tailor your assessment around important initiatives that are already underway. You may already collect data for these, but if not, assessments can provide a simple and meaningful way to collect data to ensure that these initiatives are accomplishing the goals you have set.

Can other people in my department have access to Planning?

Yes. To obtain access, please send an email to your IE facilitator with your request and evidence of VP approval. Too many hands in the pot can be a challenge, so only grant access to key individuals who will regularly assist with reporting findings.

We are not a student-facing department. How do we assess stakeholder satisfaction?

Stakeholders can be defined as students, staff, faculty, other departments, outside entities, your internal employees, and others. Assessing the satisfaction of these stakeholders can be accomplished through many different means beyond surveys. Your IE facilitator can assist with this discussion.

What does co-curricular mean?

Co-curricular departments are those departments that support the administrative and student-support functions of the University. In other words, any department other than a college or school is typically considered a co-curricular department.

Other institutions are assessing student learning in co-curricular departments. Should we?

Although LU does not require you to assess student learning, there are cases where it may be meaningful. If your department interacts heavily with students and you have certain learning goals for students, let your IE facilitator know and they can assist with designing a learning outcome and assessment that may help you capture the appropriate data.

I have assessment data. Now, what do I do with it?

There are multiple ways to interpret, report, and utilize the various types of data you could have. If instructions have not already been provided in this handbook and you are stuck, please reach out to your IE facilitator. The IE team can pull from multiple resources and provide assistance with how to interpret and use your data on a case-by-case basis.

Where do I find the templates to fill out my assessment designs?

Besides this handbook, templates can be found at this link: Co-Curricular Assessment Resources. Your IE facilitator can also provide these for you after a quick phone call or email.

Do these assessments need to be related to the LU strategic plan?

Officially, the assessments you conduct for the IE office are not required to be related to the LU strategic plan. However, if data you are already pulling for the strategic plan would accurately work for either an operational efficiency or stakeholder satisfaction assessment, you are more than welcome to report that data for your assessments. We are all about consolidating efforts and reducing workload! Please reach out to your IE facilitator if you have any questions about how this might work.

I feel lost in this process. What do I do?

Your IE facilitator is your best resource. If needed, he or she is more than willing to provide training, be present at a departmental meeting where assessment is being discussed, or have a quick phone conversation. Please let your facilitator know what you need, and he or she will be happy to provide further guidance.

ADDITIONAL RESOURCES

COMMON ASSESSMENT TERMS

Co-Curricular Unit: A department that is not a college or school but exists to support students, administration, or University infrastructure.

Purpose Statement: One to two sentences describing why your department exists and what you are trying to accomplish.

Executive Summary: A paragraph providing a high-level overview of what has occurred within your department over the last fiscal year, including any noteworthy accomplishments or challenges.

Department Improvements: A description of large-scale and/or crucial improvements made in specified areas within the department in the last fiscal year. See Department Annual Summary Template

Operational Outcome: A measurable statement describing a desired result or output. The two universal outcomes that all co-curricular units assess are *Efficient and Effective Operations* and *Stakeholder Satisfaction*. Some units may have additional, specific outcomes that they assess on an annual basis.

Learning Outcome: A measurable statement describing what students are supposed to learn by the end of an experience or event. Learning outcomes are optional for co-curricular units and are assessed on a three-year cycle.

Measure: The who, what, where, when, why and how of the assessment.

Direct Measure: A measure that evaluates hard data to directly and objectively prove or disprove the objective. Conclusions are based on facts, not opinion. Measures include usage, participation, financial, or other similar data as well as performance data based on objective, pre-determined, and accepted standards, such as medical or safety standards or standard completion rates.

Indirect Measure: A measure that evaluates stakeholder *perception* of the objective. Most common measures include surveys, interviews, focus groups, etc. What the stakeholders perceive may be different from reality, but, often times, it is helpful to know what they think, and this perception may be what is most relevant to assess, such as in a stakeholder satisfaction survey.

Administrative Measure: A specific type of direct measure typically focused on procedural or operational data as opposed to human performance or perception.

Target: The desired numerical result or goal of the assessment.

Finding: The actual results of the assessment including whether or not the target was reached.

Action Plan: An intervention designed to improve an area of operation or satisfaction as a result of an assessment.

Quantitative Data: Numerical values typically produced by internal reports or Likert-scale surveys (ex. “on a scale from 1-5”).

Qualitative Data: Responses to open-ended questions typically found in surveys, focus groups, or interviews.

ADDITIONAL RESOURCES

QUICK LINKS

ASSESSMENT

Association of American Colleges & Universities (AAC&U): https://www.aacu.org/

Association for the Assessment of Learning in Higher Education (AALHE): https://www.aalhe.org/

Assessment Commons: http://assessmentcommons.org/

National Institute for Learning Outcomes Assessment (NILOA): http://www.learningoutcomesassessment.org/

Office of Institutional Effectiveness: https://www.liberty.edu/ie

HIGHER EDUCATION

Department of Education: https://www.ed.gov/accreditation

Inside Higher Ed: https://www.insidehighered.com/

The Chronicle of Higher Education: https://www.chronicle.com/

BOOK RECOMMENDATIONS

***Fast Forward: Organizational Change in 100 Days*, Elspeth J. Murray and Peter R. Richardson (2002):**
https://www.amazon.com/Fast-Forward-Organizational-Change-Days/

***Hard Facts, Dangerous Half-Truths and Total Nonsense: Profiting From Evidence-Based Management*, Jeffrey Pfeffer and Robert I. Sutton (2006):** https://www.amazon.com/Facts-Dangerous-Half-Truths-Total-Nonsense/; also available through the Jerry Falwell Library

***The Knowing-Doing Gap: How Smart Companies Turn Knowledge into Action*, Jeffrey Pfeffer and Robert I. Sutton (2000):**
https://www.amazon.com/Knowing-Doing-Gap-Companies-Knowledge-Action/; also available through the Jerry Falwell Library

***Using Evidence of Student Learning to Improve Higher Education*, Kuh, Ikenberry and Associates (2015):**
https://www.amazon.com/Evidence-Student-Learning-Education