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University of North Alabama
Office of Institutional Research and Planning

Directions for Completing the Annual Planning and Assessment Report

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These directions for accessing and completing the Annual Planning and Assessment Report were created as a brief "walk-through" guide for directors and department chairs. Should you have any questions that are not covered in this guide, please contact the Office of Institutional Research, Planning, and Assessment. Please note that the steps of the Annual Planning and Assessment Report process are numbered **in red** and superimposed on the screenshots of the assessment system. The corresponding number is then listed below the screenshot, and an explanation of the step is given.

The Annual Planning and Assessment Report is completed in two parts. In the first, the chair/director will include all of his/her department's strategic and annual goals. If the department is academic (i.e. produces student credit hours), this is also the time when student learning outcomes are added/updated. The deadline for the part of the Annual Planning and Assessment Report is due October 1.

The second part of the Annual Planning and Assessment Report is completed at the end of the academic year and includes assessment, outcomes, and status of each goal/learning outcome. The deadline for the second part of the report is June 30 for academic departments and August 30 for educational support/administrative departments.

The Annual Planning and Assessment Report is also composed of three sections. These sections are:
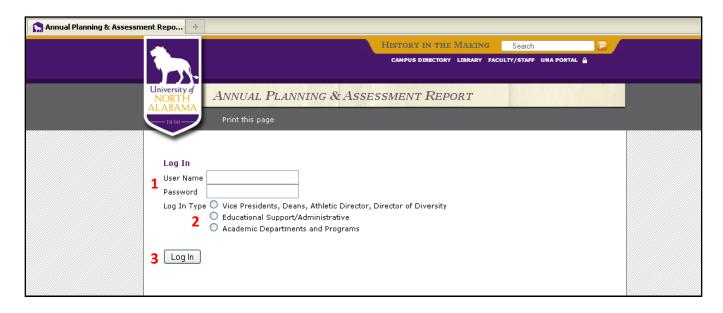
1. Long-Term Strategic Goals
2. Annual Goals
3. Student Learning Outcomes

While all units within the University should complete Sections 1 and 2, only academic departments (i.e. those who produce student credit hours) will complete Section 3.
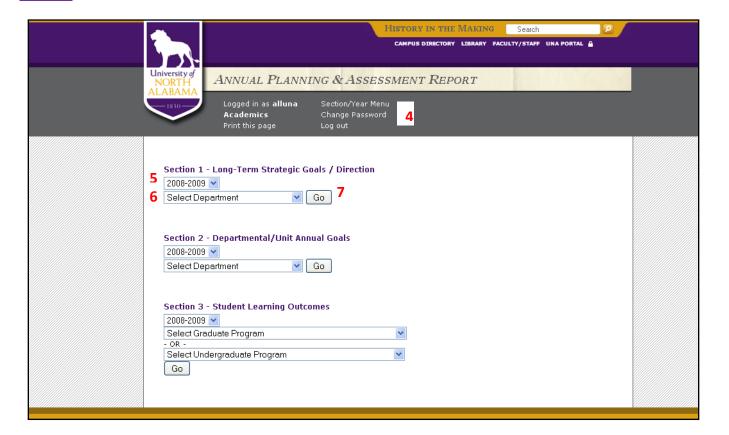
To access the Annual Planning and Assessment Report system, click on the following link:

http://www.una.edu/administration/planning-assessment/

This link will take you to the opening page of the Annual Planning and Assessment Report; it will look like the picture below:

Directions for Completing he Annual Planning and Assessment Report

1. Enter your USER NAME and PASSWORD. When you first enter the system, your USER NAME and PASSWORD are the same. Each is the first part of your UNA email address. Therefore, if John W. Smith's email were jwsmith@una.edu, his USER NAME would be jwsmith. For first time users, the PASSWORD will also be the same as the USER NAME. In this case, it would be jwsmith. The user will have the opportunity of changing his/her password later.

2. The Annual Planning and Assessment Report system has created three groups of users. Please select the appropriate group by clicking on the button. In summary, the three groups are:

   A. **Vice Presidents, Deans, Athletic Director, and Director of Diversity** – These are administrative units that are over multiple departments.
   B. **Education Support/Administrative** – These include all departments at UNA where student credit hours are NOT produced.
   C. **Academic Departments and Programs** – These include all academic departments at UNA were credit hours ARE produced.

3. After the USER NAME, PASSWORD, and appropriate group has been entered, click LOGIN to go to the following screen:

NOTE: If you are not able to get to this screen, please contact the Office of Institutional Research, Planning, and Assessment for assistance.
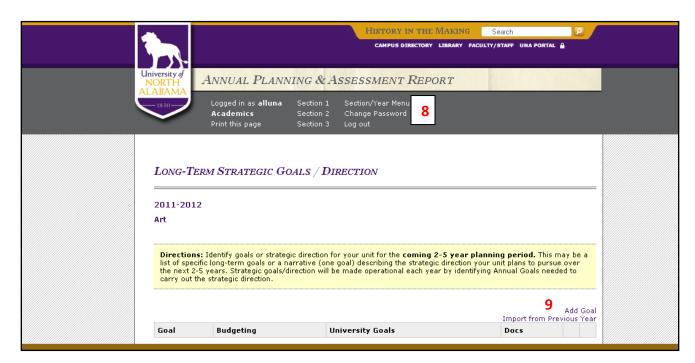
In the above screenshot, there are three **Sections** consisting of Long-Term Strategic Goals, Annual Goals, and Student Learning Outcomes. If your department is NOT an academic department (i.e. does not produce student credit hours), your screen will only display **Section 1** and **Section 2**.

4. Up at the top of the screen, you will notice your log-in name and your group. You will also be able print the page if you so choose. Also at the top of the page, you may change the academic year for all sections, change your password, or LOG OUT.

Long-Term Strategic Goals/Direction

Long-term strategic goals are defined as those goals to be accomplished within the next two to five years. Long-term goals usually include specific improvements in the department's financial or physical structure, technology, leadership, program development, etc. These goals will percolate up from the department to the divisional and institutional levels where priorities will be established based upon the strategic goals of the institution. You may only enter up to five Long-Term Strategic Goals.
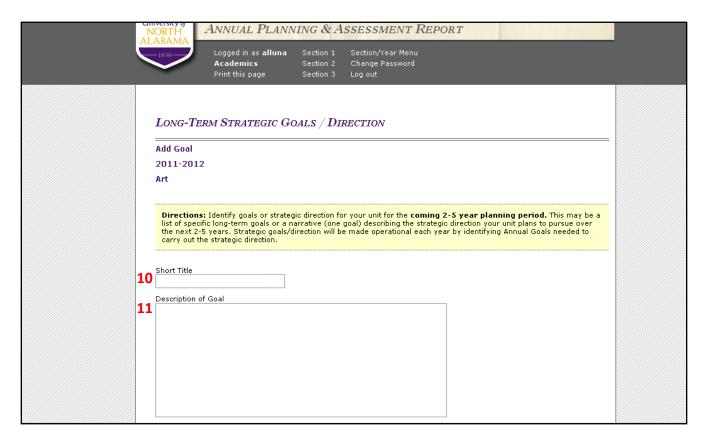
5. If the displayed academic year is not the year you want, click on the arrow to the right side of the box and choose the academic year you want.

6. Choose your department by clicking on the arrow to the right of the SELECT DEPARTMENT box. Scroll down until you see your department. Highlight and left click on your department name.

7. Click GO to move to the following screen:

Within the Long-Term Strategic Goals/Direction window, you will see your department, the academic year you chose, as well as a definition of Long-Term goals.

8. At the top of the screen, you will see a list of choices similar to those mentioned in Step 4. Additionally, you may also choose to toggle back and forth from one SECTION to

another. This will be a helpful tool if you are working in one section and think of something you would like to add to another section.

9. Here, you may choose to either ADD A GOAL or IMPORT FROM PREVIOUS YEAR. If you choose the IMPORT option, your last year goals will pre-populate into the current year. Depending on your circumstances, this step could save you a lot of time in data entry. If you choose ADD GOAL, you will see the following screen:

10. Give your strategic goal a short title that you can use for quick reference. It is a good idea to use the short title as a short description of the goal rather than naming it "Strategic Goal 1."

11. In this box, write the full description of your long-term strategic goal. If you have already saved this in a Word document, you may simply copy and paste the text from the Word document to the DESCRIPTION OF GOAL box.

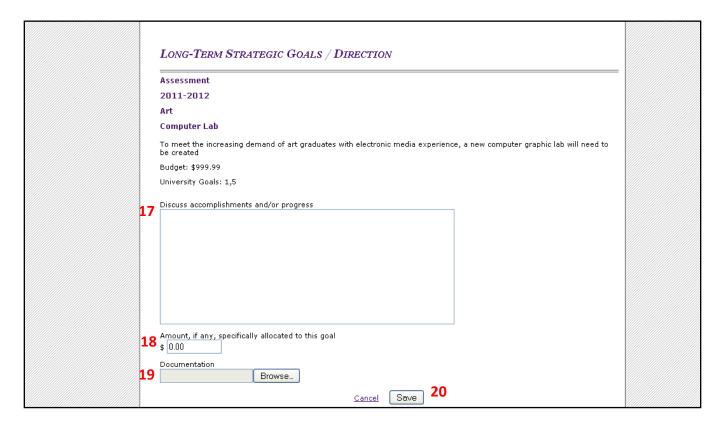Scroll down the screen to see the following items:

12. Indicate the estimated amount of new money required to support the strategic goal.

13. Here list each of the five UNA Strategic Goals. Please indicate which UNA Strategic Goals your goal supports. You may click on all UNA Strategic Goals that your goal supports.

14. If you are satisfied with your new Strategic Goal, click OK, if you are not, either edit or click on the CANCEL option which will cause the goal not to be saved. You will then be taken back to the first Strategic Goal Screen. It will look something like this:

15. Much like in Step 9, you can either choose ADD GOAL or IMPORT. Additionally, you may save your goals to a comma delimited file (.csv) by clicking EXPORT.

16. Here, you will see a summary of your goals. By clicking on VIEW DETAILS, you will go back to the goal screen for that particular goal. The ASSESSMENT option is used at the end of the year to indicate the status of that particular goal. For the October 1 deadline, you will not use the ASSESSMENT option. At the end of the year (June 30th for Academic
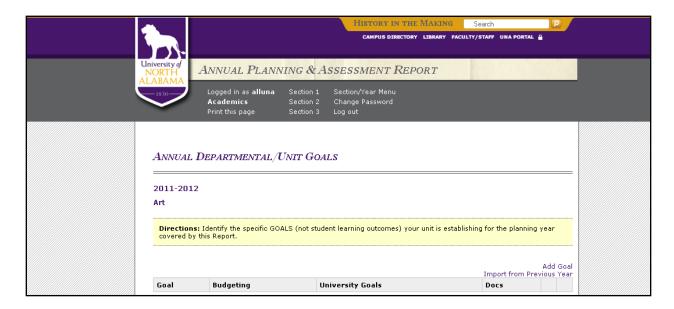
departments and August 30th for Educational Support/Administrative departments), you will follow Steps 1-7 to get to this screen. At this point, you will click on ASSESSMENT to get the following screen:

17. Include a description of the accomplishment and/or progress you made toward this particular goal. Please be as complete and detailed as you can, but keep the description within 300 words or less.

18. Indicate the amount of resources specifically allocated to this goal.

19. Please include any documentation you may have concerning this goal by clicking the BROWSE button and going to where the documentation is located on your computer. Please note that you are encouraged to include documentation of accomplishment/progress of all long-term strategic goals.

20. When you have completed the assessment window for this goal, choose CANCEL to keep it from being saved, or SAVE to save the assessment. You will be directed back to the opening Long-Term Strategic Goal page where you can complete your assessment for each goal. While in the opening Long-Term Strategic Goal page, go to the top and click on SECTION 2. This will take you to the Annual Goal section.

Departmental/Unit Annual Goals

Annual Goals are those that the department plans to complete during the academic year. These goals are not student learning outcomes. Rather, they are goals that are created in order to improve or enhance the overall department. You may only enter up to seven Annual Goals. You can access Section 2 anywhere within the system. The opening screen for Section 2 looks like this:

You will notice that the opening screen for Section 2 looks similar to that of Section 1. In fact, the opening screens for each one of the three areas are essentially the same. When you learn to navigate one, you will learn to navigate all three. As in the previous section, Section 2 allows you to either choose ADD Goal to create a new goal or IMPORT if you want to import goals from the previous year.

If you click ADD GOAL, you will see the following screen:

ANNUAL DEPARTMENTAL/UNIT GOALS

Add Goal
2011-2012
Art

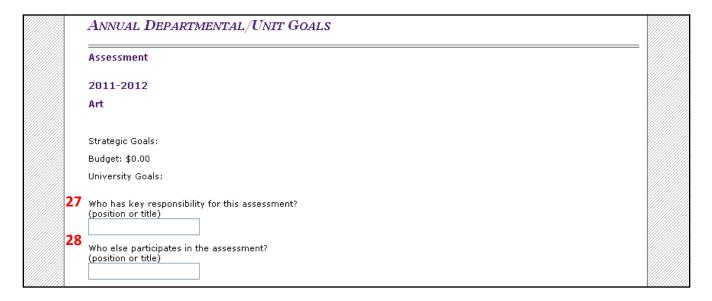> **Directions:** Identify the specific GOALS (not student learning outcomes) your unit is establishing for the planning year covered by this Report.

21 Short Title
[ ]

22 Description of Goal
[ ]

21. Give your ANNUAL GOAL a short title that you can use for quick reference. It is a good idea to use the short title as a short description of the goal rather than naming it "Annual Goal 1."

22. In this box, write the full DESCRIPTION of your annual goal. If you have already saved this in a Word document, you may simply copy and paste the text from the Word document to the DESCRIPTION OF GOAL box.

Scroll down the screen to see the following items:

23 Which, if any, strategic goals for your unit does this goal support?
☐ Computer Lab

Identify new budget allocations, if any, that support this year's annual goals:
24 $ [ ]

25 Identify the University Goals that are supported by the unit goal:
☐ To offer high quality programs;
☐ To build and maintain a student-centered university;
☐ To promote and celebrate diversity;
☐ To foster a strong university community;
☐ To enhance and support regional development and outreach
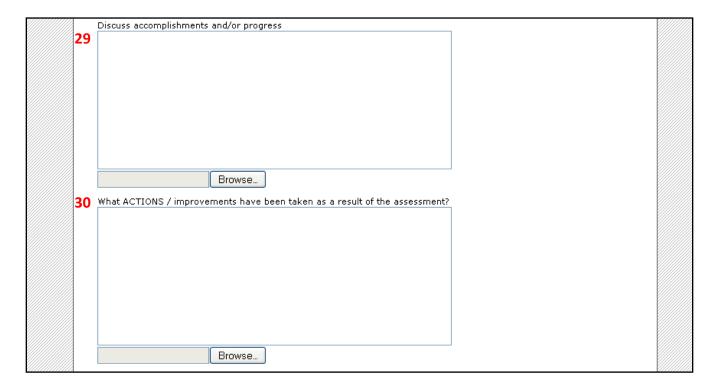
Cancel   [Save]   **26**

23. If you entered Long-Term Strategic Goals in Section 1, these goals are automatically inserted into this page. Here, you are asked if this particular ANNUAL GOAL supports a particular Long-Term Strategic Goal. If you have multiple Long-Term Strategic Goals, you may choose more than one.

24. Indicate the estimate amount of new money required to support the ANNUAL GOAL

25. Here list each of the five UNA Strategic Goals. Please indicate which UNA Strategic Goals your ANNUAL GOAL supports. You may click on all UNA Strategic Goals that your goal supports.

26. If you are satisfied with your new ANNUAL GOAL, click OK, if you are not, either edit or click on the CANCEL option which will cause the goal not to be saved. You will then be taken back to the opening Annual Goal screen. Once you are back to the opening Annual Goal screen, you will see that it looks much like the summary found in Step 16. If you are entering in the first part of your data for October, you will not need to go to the ASSESSMENT option. However, at the end of the year, you will input your assessment and outcome information. Clicking on ASSESSMENT you will see the following screen:
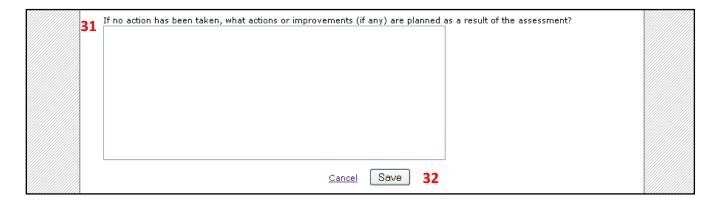

27. Please indicate the title of the person who is responsible for the assessment of this goal. It is important that you input a title and not the name of a person.

28. Please indicate the title of the person who also participates in the assessment of this goal. It is important that you input a title and not the name of a person.

Scroll down the screen to see the rest of the data fields:

Discuss accomplishments and/or progress

29

[Browse…]

30 What ACTIONS / improvements have been taken as a result of the assessment?

[Browse…]

29. Use this box to discuss accomplishments or progress of the goal. In most cases, the goal could have been reached by the department. In others, the goal may not have been reached due to some specific reason or reasons. Be as detailed as you can, but stay within 300 words or less. Click on the BROWSE button to download any documentation you have to support the accomplishment/progress of the goal.

30. This box should include any actions or improvements that have been made within the department as a result of your assessment. Here, you should briefly explain how the goal was assessed, what were the outcomes of the assessment, and what changes were made based on the assessments. Be as detailed as you can, but stay within 300 words or less. Click on the BROWSE button to download any documentation you have to support the actions/improvements of the goal.

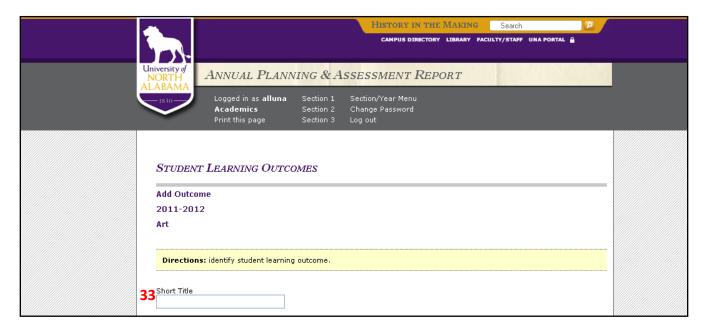Scroll down the screen to see the last items:

31 If no action has been taken, what actions or improvements (if any) are planned as a result of the assessment?

Cancel Save **32**

31. In some cases, a department makes a goal, assesses it, but is not able to move forward with the goal. In this case, indicate why you were not able to take action on the goal this year, and what actions/improvements you plan to take in the future.

32. If you are satisfied with your ASSESSMENT of your Annual Goal, click OK, if you are not, either edit or click on the CANCEL option which will cause the assessment not to be saved. You will then be taken back to the opening Annual Goal screen. Once you are back to the opening Annual Goal screen, you can complete your assessment for each goal. If all of the assessments have been entered and you are a non-academic department (i.e. do not produce student credit hours), then LOG OUT. You have completed the Annual Planning and Assessment Report. If you are an academic department, go to the top of the opening Annual Report screen and click on Section 3.

Student Learning Outcomes

Student learning outcomes are defined in terms of the knowledge, skills, and abilities that students have attained as a result of their involvement in a particular set of educational experiences. Outcomes are achieved objectives. Outcomes provide the department evidence that student learning has occurred. There are a number of different types of learning outcomes, including knowledge, understanding, application, thinking skills, general skills, attitudes, interests, appreciation, and adjustment learning outcomes. All academic programs are required to have student learning outcomes, to assess these outcomes, and to document where the department has made changes/improvements based on the outcomes of these assessments.

The opening Student Learning Outcomes screen is very similar to the opening screens of Long-Term and Annual Goals. You may choose to either IMPORT outcomes from the previous year, or you may choose ADD LEARNING OUTCOME. When you choose to ADD, the following screen will appear:
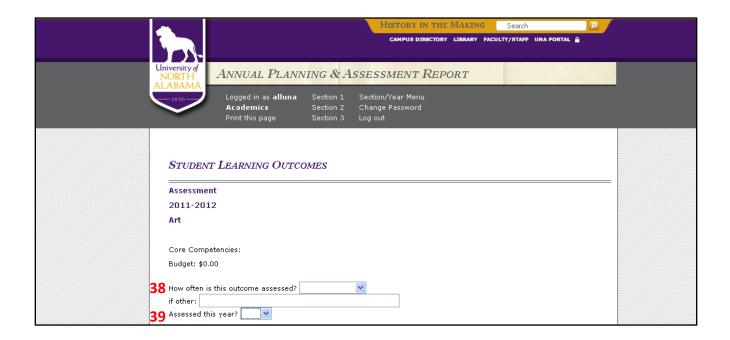

33. Give your Student Learning Outcome a short title that you can use for quick reference. It is a good idea to use the short title as a short description of the outcome rather than naming it "Student Learning Outcome 1."

Scroll down to view more data fields:

34 Description of Student Learning Outcome

35 Which of the University Core Competencies are supported by this learning outcome?
- [ ] Effective Communication
- [ ] Critical Thinking
- [ ] Use of existing and new technologies
- [ ] Analysis and reasoning
- [ ] Seeking out and Acquiring Knowledge

36 Budget revisions that support achievement of student learning outcomes:
$ _____

Cancel Save **37**

34. Include the complete description of the Student Learning Outcome in this box. If the student learning outcome is printed/published elsewhere, make sure it matches what you input.

35. UNA has five Core Competencies. Please indicate which competencies (if any) this particular student learning outcome supports. You may choose more than one.

36. Indicate any budget revisions you have made in the department as a result of assessing/achieving this outcome.

37. If you are satisfied with your new Student Learning Outcome, click OK, if you are not, either edit or click on the CANCEL option which will cause the Outcome not to be saved. You will then be taken back to the opening Student Learning Outcome screen. Once you are back to the opening Student Learning Outcome screen, you will see that it looks much like the summary found in the other sections. If you are entering in the first part of your data for October, you will not need to go to the ASSESSMENT option. However, at the end of the year, you will need to input your assessment and outcome information. Clicking on ASSESSMENT you will see the following screen:
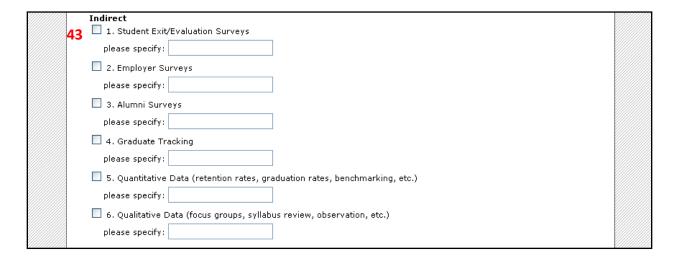
38. Indicate how often this outcome is assessed. Click on the arrow of the pull-down box for the following choices: Per Semester, Every Year, Every 2 Years, Every 3 Years, Every 4 Years, Every 5 Years, and Other.

39. Indicate if the assessment is occurring this year. Click on the arrow of the pull-down box and choose either Yes or No.

Scroll down the screen for more data fields:

Who has key responsibility for this assessment?
(position or title)

40

41 Who else participates in the assessment?
(position or title)

How is this learning outcome assessed?

42 **Direct**

☐ 1. Comprehensive Exams

please specify:

☐ 2. Nationally Normed Exams

please specify:

☐ 3. Certification/Licensure Exams

please specify:

☐ 4. Locally developed pre-test/post-test

please specify:

☐ 5. Performance/Project Assessment (includes exhibits, performances, projects, etc.)

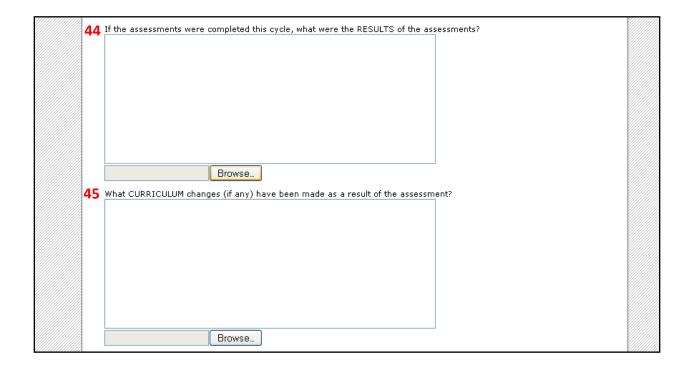please specify:

☐ 6. Portfolio Evaluation

please specify:

40. Please indicate the title of the person who is responsible for the assessment of this outcome. It is important that you input a title and not the name of a person.

41. Please indicate the title of the person who also participates in the assessment of this outcome. It is important that you input a title and not the name of a person.

42. There exist two distinct levels of assessment. The DIRECT level measures what students have actually learned. INDIRECT measures are more subjective and are ancillary to DIRECT measures. Every learning outcome MUST have at least one DIRECT measure of assessment. Click on the box next to the type/s of DIRECT assessment used. You must also specify the name of the assessment. For example, if you are using an MFT test, you would click on Box 2 and specify that it is the MFT for your particular discipline.

Scroll down the screen for additional data fields:

Indirect

43 ☐ 1. Student Exit/Evaluation Surveys

please specify: [   ]

☐ 2. Employer Surveys

please specify: [   ]

☐ 3. Alumni Surveys

please specify: [   ]

☐ 4. Graduate Tracking

please specify: [   ]

☐ 5. Quantitative Data (retention rates, graduation rates, benchmarking, etc.)

please specify: [   ]

☐ 6. Qualitative Data (focus groups, syllabus review, observation, etc.)
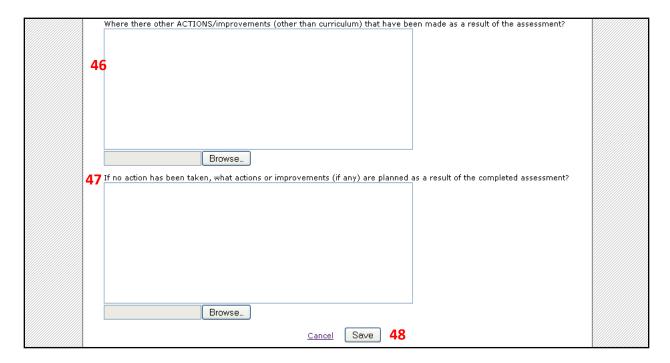
please specify: [   ]

43. While at least one DIRECT is required for each student learning outcome, INDIRECT assessment is not required, but could be used to help support assessment and improvement. If you are using INDIRECT assessment, please click on the box next to the type/s of assessment used. Next, specify the name of the assessment.

Scroll down for additional data fields:

44 If the assessments were completed this cycle, what were the RESULTS of the assessments?

[   ] [Browse…]

45 What CURRICULUM changes (if any) have been made as a result of the assessment?

[   ] [Browse…]

44. In this box, please indicate the RESULTS of the assessment used if they were completed this year. Please be as detailed and specific as possible but keep your comments to 300

words or less. Use the BROWSE button to attach any documentation that may support your assessment activities.

45. List any curriculum changes (if any) that have been made as a result of the assessment. Again, be as detailed and specific as possible but keep your comments to 300 words or less. Use the BROWSE button to attach any documentation that may support your changes to the curriculum.

Where there other ACTIONS/improvements (other than curriculum) that have been made as a result of the assessment?

46

Browse…

47 If no action has been taken, what actions or improvements (if any) are planned as a result of the completed assessment?

Browse…

Cancel | Save | **48**

46. Sometimes a department will make non-curricular changes based upon assessment. Example of such changes would be the addition of staff/faculty, equipment, new procedures, etc. Please list any non-curricular actions/improvements you made to the department. Use the BROWSE button to attach any documentation that may support your non-curricular changes.

47. In some cases, a department assesses a learning outcome but is not able to move forward with changes/improvement. In this case, indicate why you were not able to take action on the learning outcome this year, and what actions/improvements you plan to take in the future.

48. If you are satisfied with your ASSESSMENT of Student Learning Outcome, click OK. If you are not, either edit or click on the CANCEL option which will cause the assessment not to be saved. You will then be taken back to the opening Student Learning Outcome screen. Once you are back to the opening Annual Goal screen, you can complete your assessment for each goal. If all of the assessments have been entered and you are a

non-academic department then LOG OUT. You have completed the Annual Planning and Assessment Report.

Edit, Review, Print, and Post Reports

[This information will be added at a later date]