

Administrative Effectiveness Evaluation (AEE)

2024-2025

Office of Institutional Accreditation & Effectiveness



WILLIAM & MARY

CHARTERED 1693

SACSCOC Principles Standard 7.3:

“The institution **identifies expected outcomes** of its administrative support services and **demonstrates the extent to which the outcomes are achieved.**
(Administrative effectiveness)”

AEE Timeline



GENERAL LOGISTICS



1

General Logistics

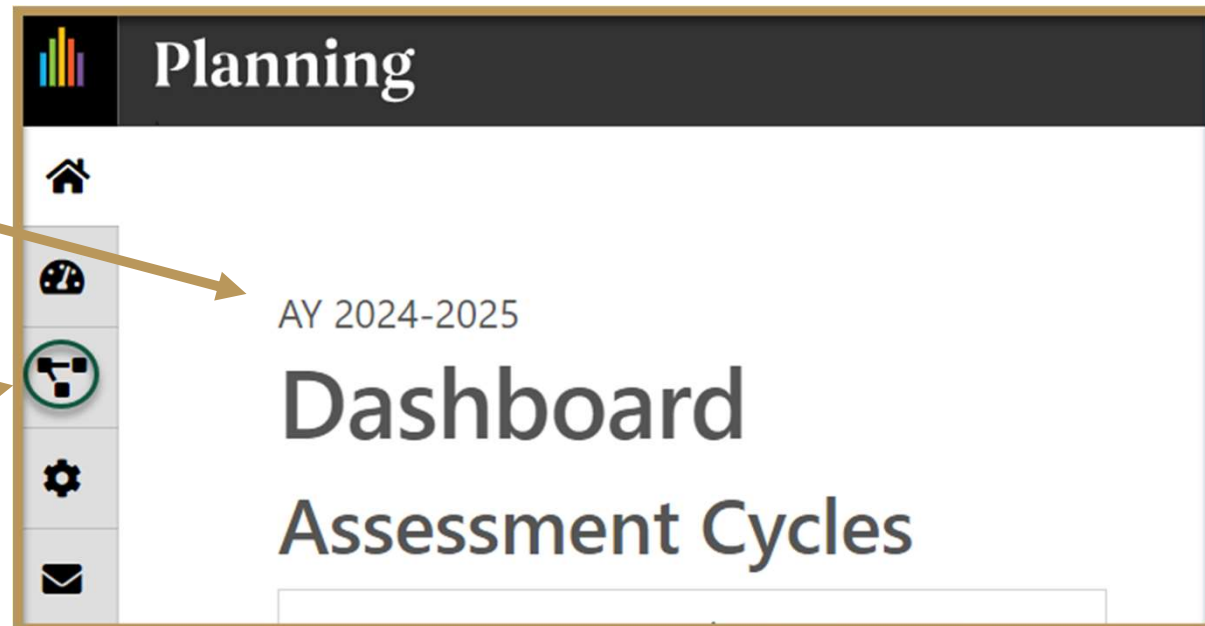
- Go to <https://wm.campuslabs.com/planning/dashboard>
- Enter your W&M User ID & Password.

A screenshot of a login form titled 'W&M Central Authentication Service'. The form has a grey header with the title. Below the header, there are two input fields: 'WMuserid:' and 'Password:'. Below the password field is a checkbox labeled 'I am at a public workstation.'. At the bottom of the form is a green button labeled 'LOGIN'. A mouse cursor is visible over the top left corner of the form. An arrow points from the text instructions to the form.

2

General Logistics

- Your **Dashboard** displays here.
- Select the **Plans** icon to access your Administrative Effectiveness Evaluation(s) (AEE).



3

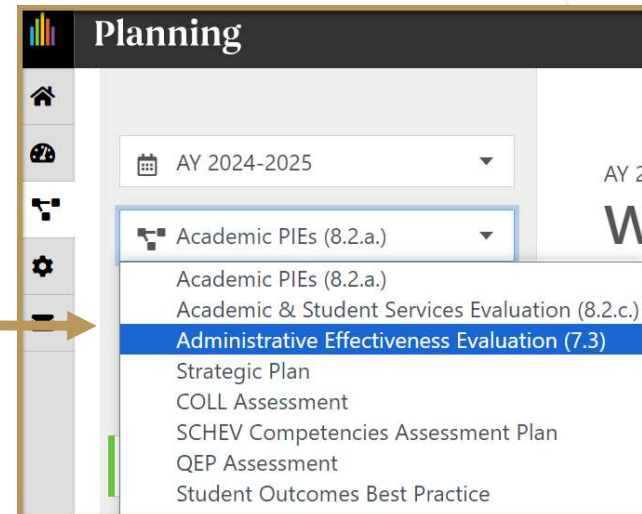
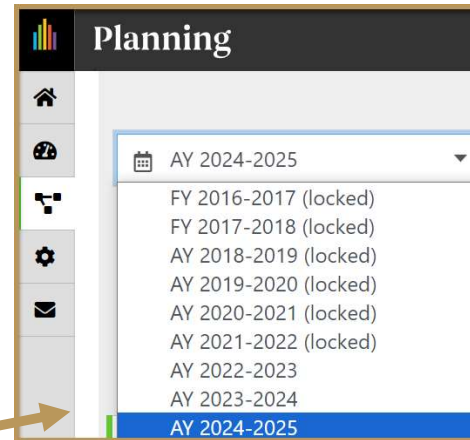
General Logistics

- Ensure you are working in the current **Academic Year**.

Planning is set to default to the current year.

- Select **Administrative Effectiveness Evaluation (7.3)** inside the dropdown list.

It may be the only item on your list.

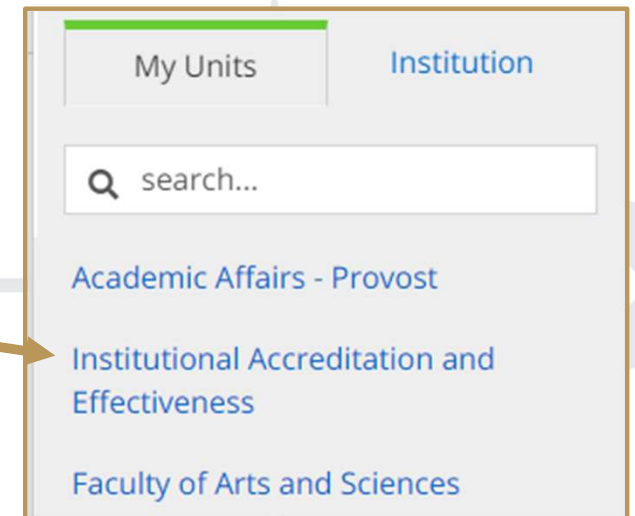


4

General Logistics



- Select the **My Units** Tab in the left-hand navigation menu.
- Select your unit/department from the left-hand navigation pane and then select your sub-unit, if applicable.
e.g., Institutional Accreditation and Effectiveness. The unit(s) to which you have permissions will display.



5

General Logistics

- Your Administrative Effectiveness Evaluation **Plan Items** display here.
- Click the item name to access and complete your unit's **Purpose/Mission Statement** or **AEE Expectation 1**.
Expectation 1 – Efficient & Effective Operations.

Plan Items | Reports | Documents

FILTER | Sort: Default | + Plan Item

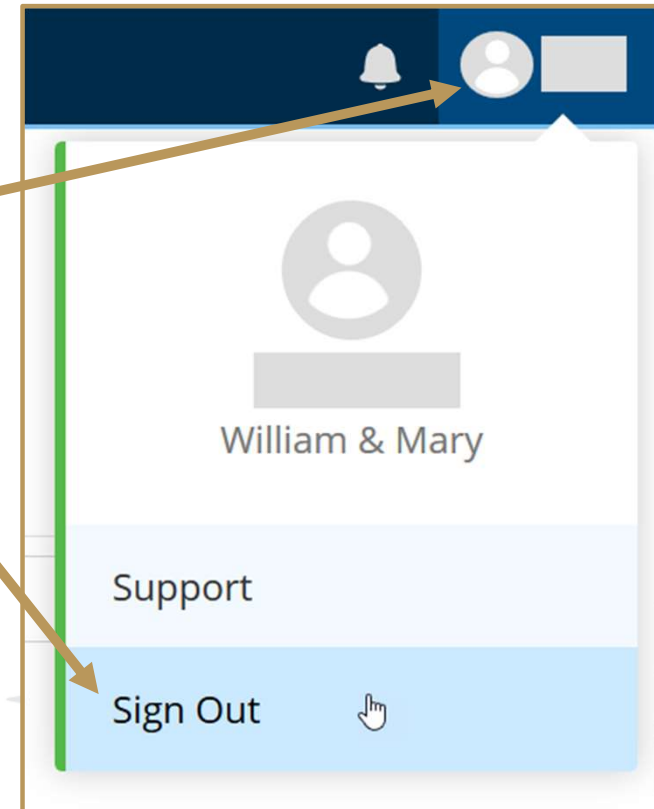
[Purpose/Mission: Institutional Accreditation & Effectiveness](#)

IAE Sample Unit Academic & Student Services Evaluation 8.2.c. Academic & Student Services Unit Purpose/Mission	Review Complete (For IAE/SA Admin Use) 7/1/24 - 6/30/25
1 - Efficient & Effective Operations: The unit establishes and maintains efficient and effective operations, optimizing processes and resources (budgetary, human, technological, physical) to achieve targets.	
IAE Sample Unit Academic & Student Services Evaluation 8.2.c. Academic & Student Services Evaluation Plan & Results FY25	7/1/24 - 3/31/25

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General Logistics

- Click on your name in the top right corner to **Sign Out of Planning** and the **Anthology** platform.
- Close your browser to fully complete the sign out process.



PURPOSE/MISSION STATEMENT



7

Complete Your Unit's Purpose/Mission

- From the **Plan Items** page, select your unit's **Purpose/Mission Statement** to view and edit.
- The **title** and **general instructions** are displayed at the top of each field. Additional specific instructions/prompts, as applicable, appear inside text boxes.
- Clicking anywhere outside of text boxes will **save** your edits. You will see a green circle with a checkmark to the right of the box.

AY 2024-2025 / ADMINISTRATIVE EFFECTIVENESS EVALUATION (7.3)

Institutional Accreditation & Effectiveness (AEE 7.3.)

Plan Items Reports Documents

FILTER Sort Default + Plan Item

Purpose/Mission: Institutional Accreditation & Effectiveness

Institutional Accreditation & Effectiveness (AEE 7.3.) Review Complete (For IAE/SA Admin Use) 7/1/24 - 6/30/25

Administrative Unit Purpose/Mission

Unit Name Purpose/Mission *

Institutional Accreditation & Effectiveness Purpose/Mission

Purpose/Mission Statement
The Purpose/Mission Statement clearly describes the unit within the context of the university and links it to the university's mission.

File Edit View Insert Format Tools Table

Paragraph B I

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Core Functions
Enter your unit's core functions. What are your main responsibilities for the university? What are the key programs and services for which your office is responsible? What is your reason for being? Core functions can typically be represented in 3-5 succinct statements.

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Complete Your Unit's Purpose/Mission

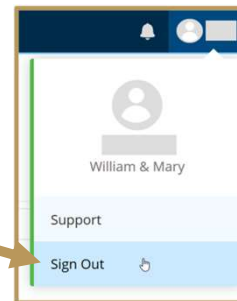
- Click **Done** at the bottom of the page to return to your **Plan Items**.
- **Select** an **Expectation** to begin working on the **Evaluation Plan** or **Sign Out** of Planning and **close** your browser.



Delete



Done



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EXPECTATION EVALUATION PLAN



9

Complete Expectation Evaluation Plan

- Your unit will evaluate **Efficient & Effective Operations** (Exp. 1).
- **Expectation Description:** Explain what it is you would like to evaluate and what you expect to gain from this evaluation. Please follow the prompts.
- **Participants:** Who will be included in this evaluation?

Expectation Name *

1 - Efficient & Effective Operations: The unit establishes and ma

Expectation Description

Please describe the following: 1) What is your unit/department trying to accomplish? 2) one measurable aspect/outcome relating to this expectation that is appropriate for your unit to evaluate this year; 3) why this aspect/outcome is important to evaluate; and 4) how this aspect/outcome relates to W&M's strategic plan, Vision 2026.

File Edit View Insert Format Tools Table

← → Paragraph B I ...

1) What exactly would you like to evaluate?

2) Measurable aspect/outcome relating to this expectation that is appropriate for your unit to evaluate this year:

3) Why this aspect/outcome is important to evaluate:

4) How this aspect/outcome relates to W&M's strategic plan, Vision 2026:

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Expectation Evaluation Plan

Complete the fields below, then select "Ready for Review" from the Evaluation Plan Review Status dropdown list.

Participants

Describe who is involved in collecting, reviewing, and analyzing your data/information.

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Complete Expectation Evaluation Plan

- **Data Sources, Collection, & Review Process:** Tell us about the information you plan to collect, how it will be collected, and when. Please follow the prompts.
- **Expectation Achievement Target:** What is the desired outcome or goal of the evaluation? The wording used will allow you to determine if your **target** was “Met,” “Partially Met,” or “Not Met.”

Data Sources, Collection, & Review Process
Describe the data/information sources, collection, and review process: 1) what data/information you will collect and from what sources; 2) how/what methods and when you will collect the data/information; 3) when you will review the data/information and report the results.

File Edit View Insert Format Tools Table

← → Paragraph ▾ **B** *I* ...

1) Data/information you will collect and the source of the data/information (e.g. students, faculty, database, external constituents, etc):

2) How (methods) and when you will collect the data/information:

3) When you will review the data/information and report the results (*NOTE: Results are due **on or before 3/31/2025**.*):

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Expectation Achievement Target
How will you know that you have met this expectation? Describe the intended qualitative and/or quantitative performance level(s)/outcome(s) of this evaluation (e.g., "We will know we have met our target if our department is able to review all faculty/staff complaint forms by 02/14/2025.")

File Edit View Insert Format Tools Table

← → Paragraph ▾ **B** *I* ...

We will know we have met our target if:

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Complete Expectation Evaluation Plan

- **Evaluation Start and End Date:** Evaluations are set to begin at the start of the new fiscal year.
- **Primary Responsible Person & Additional Responsible Person(s):** List the name, job title, and email of the individual in charge of the evaluation. Add up to three additional person(s) here.

Evaluation Start Date of the Evaluation *
07/01/2024

Evaluation End Date of the Evaluation *
03/31/2025

Responsible Person(s)
Enter the information for up to four individual(s) responsible for

Primary Responsible Person Name

Primary Responsible Person Title

Primary Responsible Person Email

Additional Responsible Person Name 1

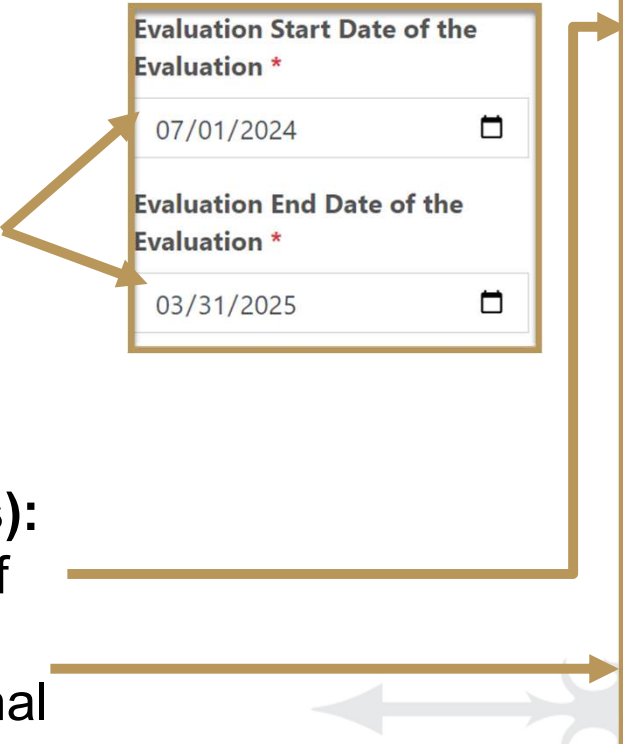
Additional Responsible Person Email 1

Additional Responsible Person Name 2

Additional Responsible Person Email 2

Additional Responsible Person Name 3

Additional Responsible Person Email 3



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Complete Expectation Evaluation Plan

- **Evaluation Plan Review Status:** Select “**Ready for Review**” in the dropdown box. If you are still editing, select “**Not Ready for Review.**”

Due 10/15/2024.

- **IAE/REVIEWER(S)** will indicate approval (“**Review Complete**” in blue above) or that action is needed after review.

IAE/REVIEWER(S) will also provide feedback on the evaluation plan here.

The screenshot shows a dropdown menu titled "Evaluation Plan Review Status". Below the title is a instruction: "Select 'Ready for Review' when you have completed your evaluation plan; select 'Not Ready for Review' if you are still working on it." The dropdown list contains the following options: "Not Ready for Review", "Not Ready for Review", "Ready for Review", "Resubmitted for Final Review", "Review Complete (For IAE/SA Admin Use)", and "[Blank]". The "Ready for Review" option is circled in green, and the "Review Complete (For IAE/SA Admin Use)" option is highlighted in blue. An arrow points from the text "Select 'Ready for Review' in the dropdown box" to the "Ready for Review" option.

The screenshot shows a text area titled "Evaluation Plan Review Comments". Below the title is a instruction: "IAE/REVIEWER(S): Enter comments related to your review of this expectation's evaluation plan." The text area includes a rich text editor toolbar with options for "File", "Edit", "View", "Insert", "Format", "Tools", and "Table". The toolbar also includes icons for undo, redo, paragraph style, bold, italic, bulleted list, numbered list, decrease indent, increase indent, and link. The text area is currently empty.

*Note: Select **Resubmitted for Final Review** from the dropdown above if you are resubmitting the evaluation plan after making updates based on IAE/Reviewer(s) feedback.*

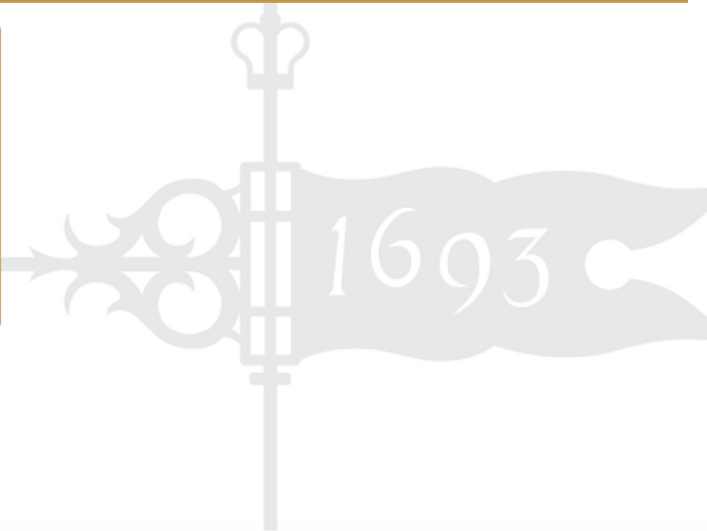
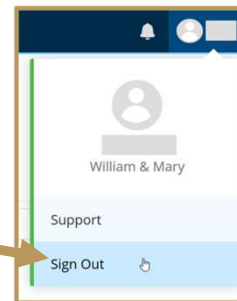
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Complete Expectation Evaluation Plan

- Click **Done** at the bottom of the page to return to your **Plan Items**.



- **Sign Out** of Planning and **close** your browser.



EVALUATION RESULTS & TARGET ACHIEVEMENT



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Complete Evaluation Results & Target Achievement

- **Summary and Analysis of Evaluation Results:** After you have collected and analyzed your data, **summarize** the results of your analysis here.

You may upload supporting documentation by clicking the **+File** or **+Folder** icons.

- **Achievement Target Status:** Set target status dropdown to either “Met,” “Partially Met,” or “Not Met.”

The screenshot shows a web form titled "Evaluation Results and Target Achievement". At the top, it says "After you have collected & analyzed data, complete the fields below, then select 'Submit' from the Evaluation Results Status dropdown list." Below this is a text box with the instruction "Complete the fields below, then select 'Submit' from the Evaluation Results Status dropdown list." The next section is "Summary and Analysis of Evaluation Results", with a sub-instruction: "Summarize in this field the results of your evaluation for this expectation as outlined in your plan above. Include a description of what you evaluated. You may attach full results/reports below the text box." This section contains a rich text editor with a menu bar (File, Edit, View, Insert, Format, Tools, Table) and various formatting icons. Below the editor is a "Plan Item Files" section with the text "There are no attachments." and two buttons: "+ File" and "+ Folder". The final section is "Achievement Target Status", with the instruction "Did you meet this expectation? Select 'Met,' 'Partially Met,' or 'Not Met' from the dropdown list." A dropdown menu is open, showing the options "Met", "Partially Met", and "Not Met".

Annotations in the image include:

- A blue arrow pointing from the "Summary and Analysis of Evaluation Results" text to the rich text editor.
- A blue arrow pointing from the "+File" or "+Folder" text to the corresponding buttons in the "Plan Item Files" section.
- A blue arrow pointing from the "Achievement Target Status" text to the dropdown menu.

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Complete Evaluation Results & Target Achievement

- **Action Plan *if Achievement Target is Partially or Not Met*:** Describe **actions** to make improvements or changes based on your analysis of results.
- **Evaluation Results Status:** Select “*Submit*” when done. *Due 3/31/2025.*
- Click **Done** at the bottom of the page to return to your **Plan Items**.
- **Sign Out** of Planning and **close** your browser.

Action Plan *if Achievement Target is Partially or Not Met*
(IF THE ACHIEVEMENT TARGET STATUS IS PARTIALLY OR NOT MET) Describe actions – improvements, updates, and changes – you plan to implement to meet this expectation's achievement target. If you have already started to implement actions, state what you have done and what remains to be done.

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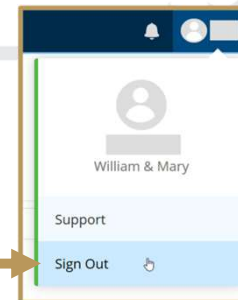
Paragraph B I

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Evaluation Results Status
Please select "Submit" from the dropdown list when you have completed the fields above:

Submit
ASC/IAE Reviewed

Done



Questions?

Contact
Us



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