

# Academic & Student Services Evaluation (ASSE)

2024-2025

Office of Institutional Accreditation & Effectiveness



WILLIAM & MARY

CHARTERED 1693

# What You Need to Know

## Purpose of Academic & Student Services Evaluation (ASSE)

- Better our programs/services/processes
- Serve the needs of our stakeholders
- Tell our story to internal and external entities
- Demonstrate compliance with SACSCOC *Principles of Accreditation (January 2018)*

# What You Need to Know

## SACSCOC *Principles* Section 8: Student Achievement

“ . . . Effective institutions focus on the design and **improvement** of educational experiences **to enhance student learning** and **support student learning outcomes** for its educational programs. To meet the goals of educational programs, an institution **provides appropriate academic and student services to support student success.**”

# What You Need to Know

## SACSCOC *Principles* Standard 8.2.c.:

“The institution **identifies** expected outcomes, **assesses** the extent to which it achieves these outcomes, and **provides evidence of seeking improvement based on analysis of the results** in the areas below:

- a. Student learning outcomes for each of its educational programs. (Student outcomes: educational programs)
- b. Student learning outcomes for collegiate-level general education competencies of its undergraduate degree programs. (Student outcomes: general education)
- c. Academic and student services that support student success.** (Student outcomes: academic and student services)”

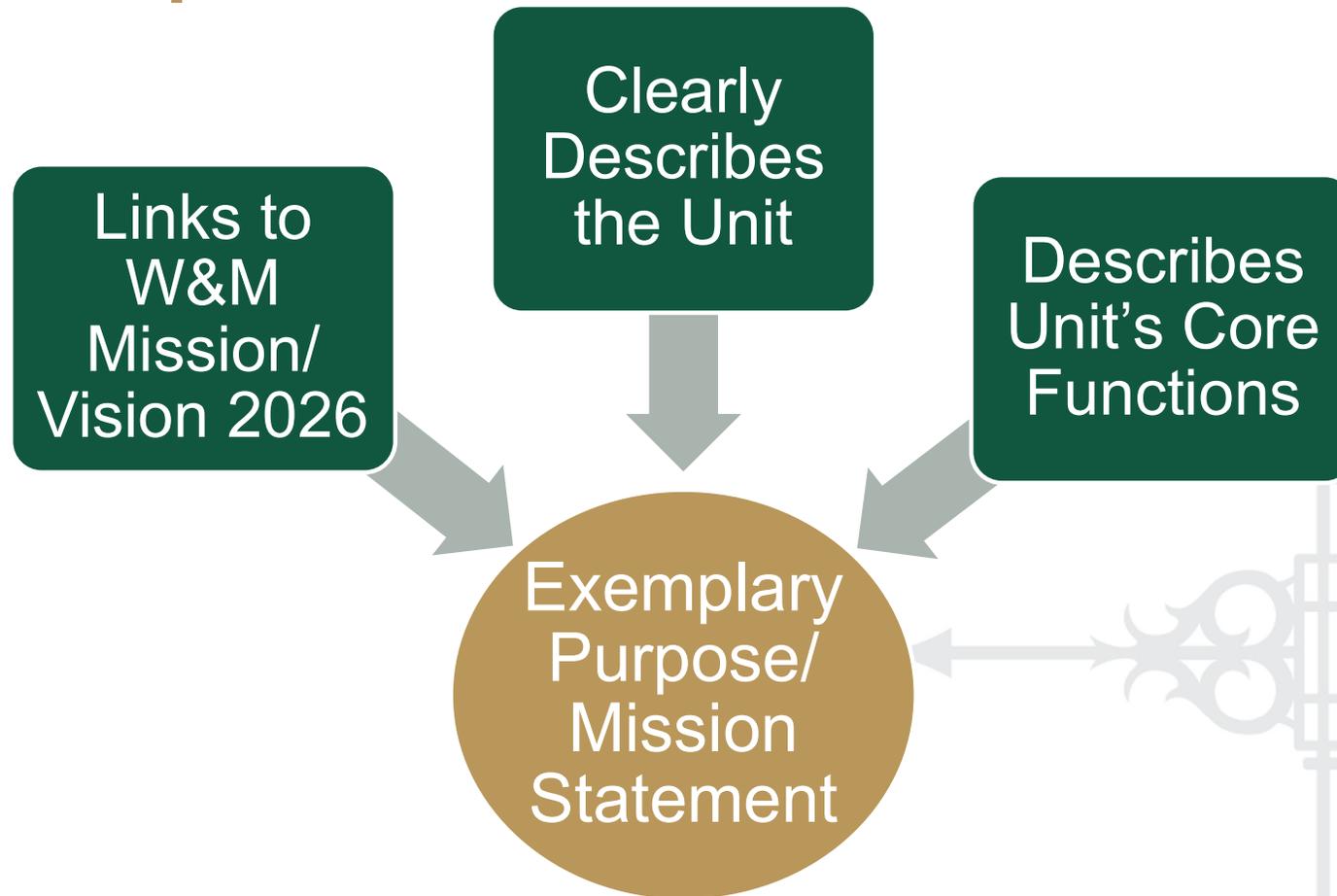
*Note: Units under 8.2.c. provide direct support to faculty & students, indirect support for student learning, or a specific co-curricular mission.*

# What You Need to Know

## ASSE Plan, Results, & Achievement Reporting Components

- Purpose/Mission Statement
- Goal & Expectations
- Evaluation Plan
- Results, Target Achievement, & Action Plans

# Purpose/Mission Statement



# Goal & Expectations

Goal: Efficient & Effective  
Operations Leading to Quality  
Academic & Student Services

Expectation 1:  
Efficient & Effective  
Operations

FY 25

Expectation 2:  
Quality of Academic  
& Student Services

FY 26

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# Expectations

## Expectation 1: Efficient & Effective Operations

Unit establishes & maintains efficient & effective operations, optimizing processes & resources to achieve targets.

- Covers majority of unit functions
- Use as opportunity to examine an aspect of operations more closely
- Choose a process, facility, technology, equipment, performance indicator, etc. to measure for efficiency &/or effectiveness

# Evaluation Plan

For Expectation 1, describe:

- Participants collecting, reviewing, & analyzing data
- Data Sources, Collection, & Review Process
  - Data
  - Methods
  - Schedule for review & reporting
- Achievement Target: intended results (qualitative/quantitative) of evaluation

# Results, Target Achievement, Action Plan

For Expectation 1, describe:

- Summary & Analysis of Evaluation Results
- Achievement Target Status:
  - Met
  - Partially Met
  - Not Met
- Interpretation & Use of Results
- Action Plan (if Partially or Not Met): actions to seek improvements &/or enhance student services/experiences to meet target in future evaluation cycles

# ASSE Timeline



# Instructions for Logging into & Navigating Anthology Planning Software



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# GENERAL LOGISTICS



1

## General Logistics

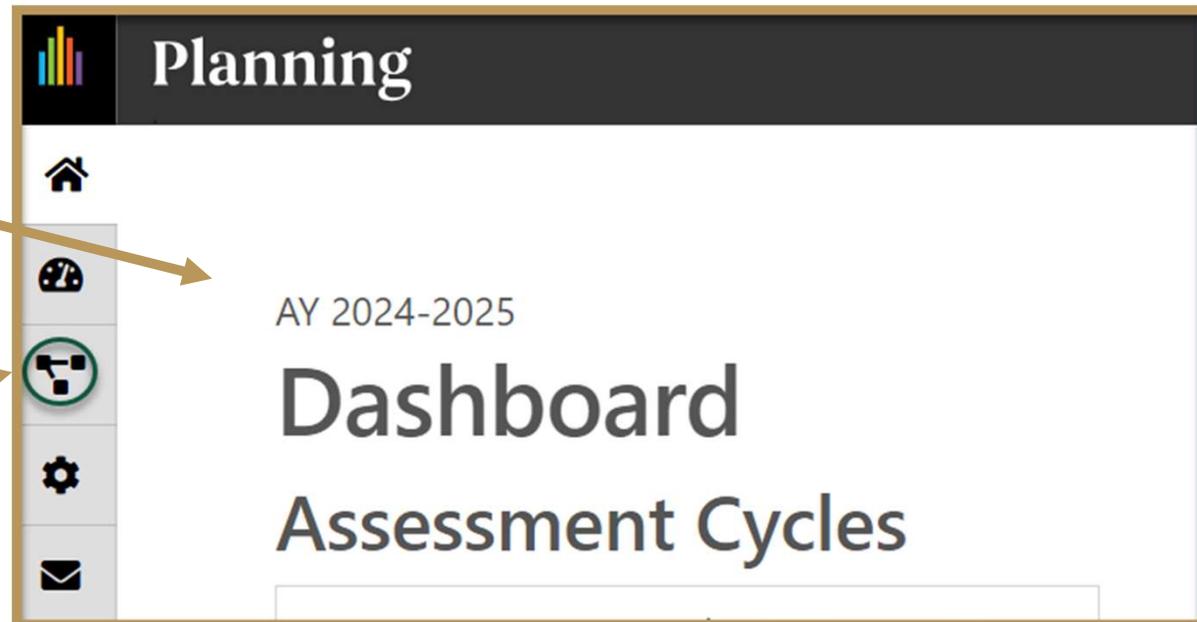
- Go to <https://wm.campuslabs.com/planning/dashboard>
- Enter your W&M User ID & Password.

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'. An arrow points from the text instructions to the form. A mouse cursor is visible over the top of the form.

# 2

## General Logistics

- Your **Dashboard** displays here.
- Select the **Plans** icon to access your Academic & Student Services Evaluation(s) (ASSE).



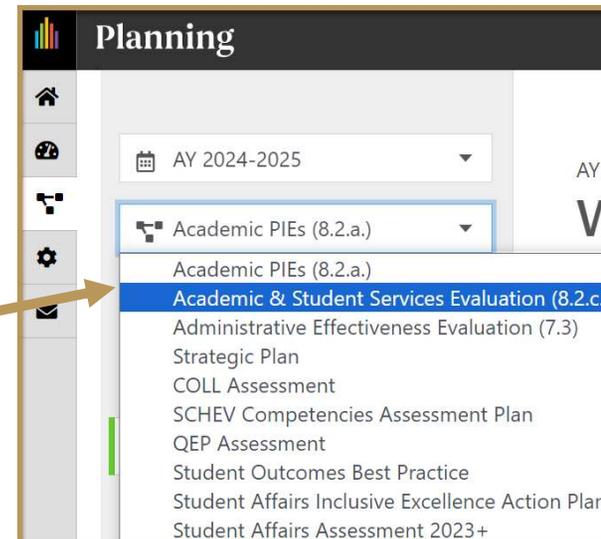
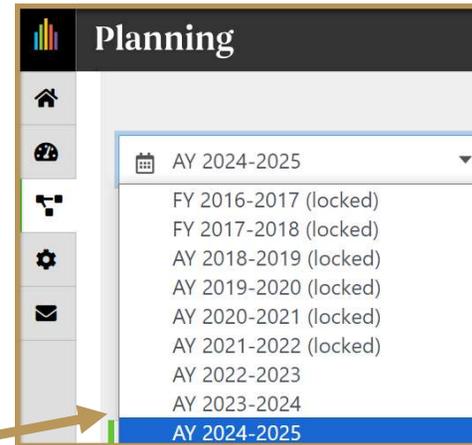
# 3

## General Logistics

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

Planning is set to default to the current year.

- Select **Academic & Student Services Evaluation (8.2c)** inside the dropdown list.  
It may be the only item on your list.

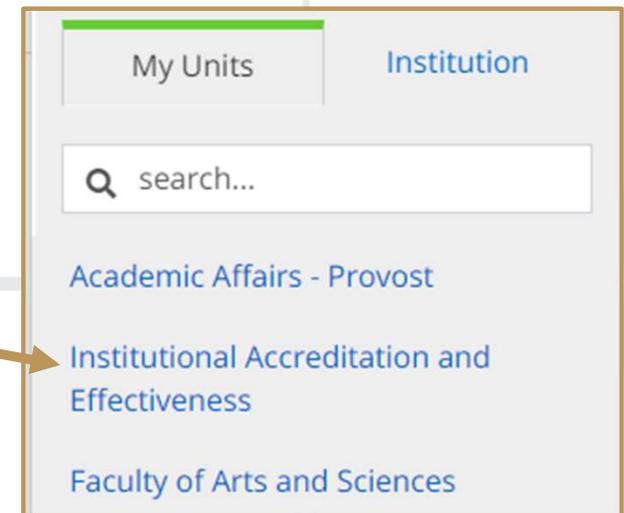


# 4

## General Logistics



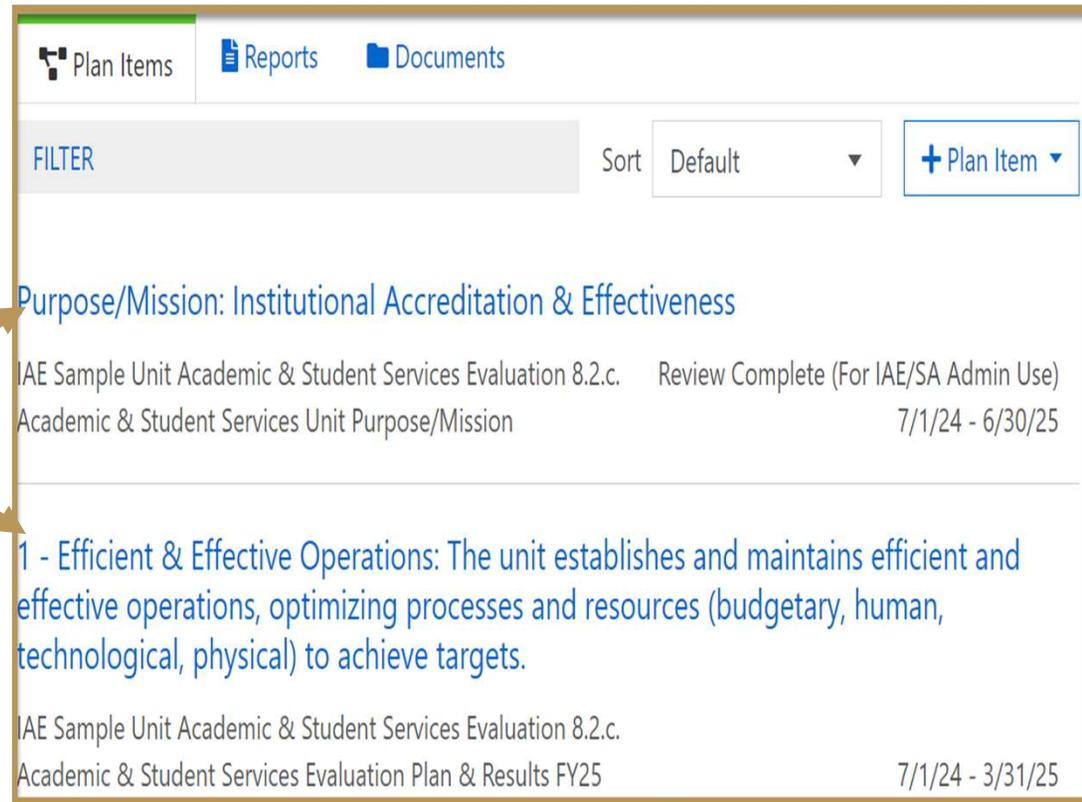
- Select the **My Units** Tab in the left-hand navigation menu.
- Select your unit/department from the left-hand navigation pane and then select your sub-unit, if applicable.  
e.g., Institutional Accreditation and Effectiveness. The unit(s) to which you have permissions will display.



# 5

## General Logistics

- Your Academic & Student Services Evaluation **Plan Items** are displayed here.
- Click the item name to access and complete your unit's **Purpose/Mission Statement** or **ASSE Expectation 1**.  
Expectation 1 – Efficient & Effective Operations.



Plan Items Reports Documents

FILTER Sort Default + Plan Item

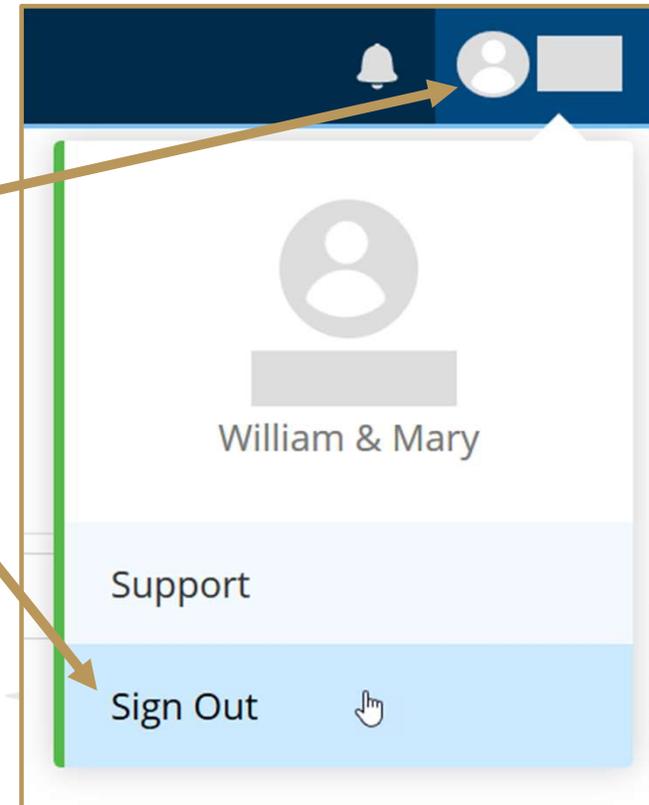
[Purpose/Mission: Institutional Accreditation & Effectiveness](#)  
IAE Sample Unit Academic & Student Services Evaluation 8.2.c. Review Complete (For IAE/SA Admin Use)  
Academic & Student Services Unit Purpose/Mission 7/1/24 - 6/30/25

[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

# 6

## 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)  
Administrative Unit Purpose/Mission 7/1/24 - 6/30/25

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  
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.  
File Edit View Insert Format Tools Table  
Paragraph B I

Auto Saved: Aug 19, 2024, 9:05:05 AM

# 8

## Complete Your Unit's Purpose/Mission

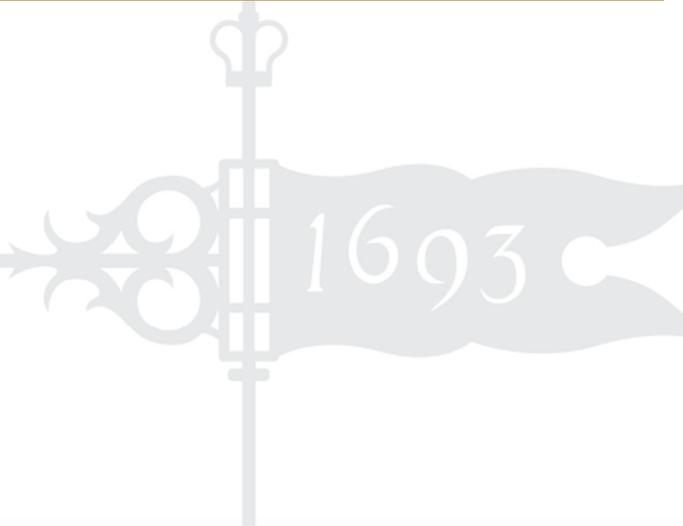
- Click **Done** at the bottom of the page to return to your **Plan Items**.
- **Select** an **Expectation** to begin working on the **Evaluation Plan** or **Sign Out** of Planning and **close** your browser.



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?

**\*NOTE: If FY24 Expectation Achievement Target is Partially or Not Met, you will implement the Action Plan and evaluate again this year.**

**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.

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← → 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:

**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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← → Paragraph ▾ **B** *I* ⋮

# 10

## 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.*

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← → 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.*):

p

**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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# 11

## 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.

<b>Evaluation Start Date of the Evaluation *</b>
07/01/2024 
<b>Evaluation End Date of the Evaluation *</b>
03/31/2025 

<b>Responsible Person(s)</b>
Enter the information for up to four individual(s) responsible for
<b>Primary Responsible Person Name</b>
<input type="text"/>
<b>Primary Responsible Person Title</b>
<input type="text"/>
<b>Primary Responsible Person Email</b>
<input type="text"/>
<b>Additional Responsible Person Name 1</b>
<input type="text"/>
<b>Additional Responsible Person Email 1</b>
<input type="text"/>
<b>Additional Responsible Person Name 2</b>
<input type="text"/>
<b>Additional Responsible Person Email 2</b>
<input type="text"/>
<b>Additional Responsible Person Name 3</b>
<input type="text"/>
<b>Additional Responsible Person Email 3</b>
<input type="text"/>

# 12

## 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'..." 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 a dropdown menu. 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.*

# 13

## Complete Expectation Evaluation Plan

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

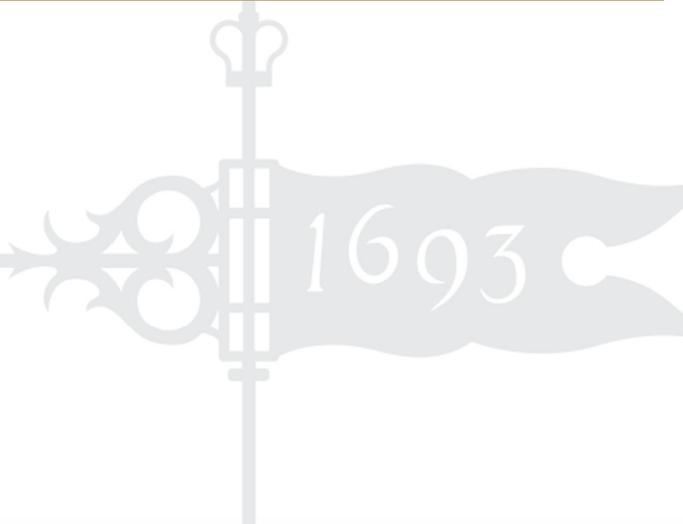


Delete



Done

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



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# EVALUATION RESULTS & TARGET ACHIEVEMENT



# 14

## 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 includes a rich text editor toolbar with options for Paragraph, Bold (B), Italic (I), and various alignment and list options. Below the editor is a "Plan Item Files" section that says "There are no attachments." and has "+ File" and "+ Folder" buttons. 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:

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

# 15

## Complete Evaluation Results & Target Achievement

- **Interpretation & Use of Results:**  
Tell us about challenges you faced, best practices determined, factors that may have influenced your results, and how you use/plan to use these results.
- **Action Plan \*if Achievement Target is Partially or Not Met\*:**  
Describe **actions** to seek *improvements or enhance student services and/or experiences*. Please follow the prompts.

**Interpretation & Use of Results**  
*Discuss the interpretation of your results, for example challenges you faced, best practices determined, things that may have influenced results, conclusions you can draw, etc. How are you planning to use or currently using the data?*

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← → Paragraph ▾ **B** *I* [Text Alignment Icons] [List Icons]

P

**Action Plan \*if Achievement Target is Partially or Not Met\***  
*(IF THE ACHIEVEMENT TARGET STATUS IS PARTIALLY OR NOT MET) Describe actions to seek improvements and/or enhance student services/experiences - i.e., updates and changes you plan to implement to meet this expectation's achievement target in future evaluation cycles. Include the evidence used for identifying these changes and when the changes are being implemented. If you have already started to implement actions, state what you have done and what remains to be done.*

File Edit View Insert Format Tools Table

← → Paragraph ▾ **B** *I* [Text Alignment Icons] [List Icons]

1) Actions to seek improvements and/or enhance student services/experiences:

2) Evidence used for identifying changes and when changes are being implemented:

# 16

## Complete Evaluation Results & Target Achievement

- **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.

**Evaluation Results Status**

Please select "Submit" from the dropdown list when you have completed the fields above.

Submit  
ASC/IAE Reviewed

Delete Done

William & Mary

Support

Sign Out

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# Questions?

Contact  
Us



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