## Table of Contents

I. INTRODUCTION ..................................................................................................................3  
   A. Assessment Philosophy .................................................................................................3  
   B. Mercyhurst University Mission ....................................................................................3  
   C. Assessment & Planning Department ............................................................................4  

II. STRATEGIC GOALS ..........................................................................................................5  
   A. Key Initiatives ................................................................................................................5  
   B. Core Values ....................................................................................................................7  
   C. Middle States Commission on Higher Education Standards .......................................8  
   D. Mercyhurst Strategic Initiatives ..................................................................................10  

III. ASSESSMENT GUIDELINES ..........................................................................................15  
   A. Benefits of Assessment ...............................................................................................15  
   B. Components of Assessment .......................................................................................16  
   C. Self Study ....................................................................................................................24  
   D. Assessment Techniques .............................................................................................25  
   E. Assessment Timeline ..................................................................................................26  

IV. WEAVE ................................................................................................................................27  
   A. What is WEAVEonline? .............................................................................................27  
   B. WEAVE’s Principle of Assessment? ............................................................................27  
   C. WEAVE Cycles ..........................................................................................................28  

IV. FORMS AND DIRECTIONS .............................................................................................29  

VII. APPENDICES ....................................................................................................................37  
   A. Glossary of Terms .......................................................................................................37  
   B. Examples of Assessment Hierarchies ........................................................................41  

References ..............................................................................................................................44
I. INTRODUCTION

A. ASSESSMENT PHILOSOPHY

Assessment is an enduring, cyclical process intended to be informative in nature. This process includes identifying areas of strength as well as areas that need to be improved at both the curricular and institutional level. Assessment examines how the various components of the institution function together as a whole.

The assessment of student learning focuses on the central mission of the university; it determines how well and how much our students are learning. Institutional effectiveness depends on determining if all of the components of the university are contributing to achieving the goals. It builds upon the contributions of each program and service, especially in how they contribute to student learning. Both academic and institutional assessment are based on the assumption that, given students’ pre-college preparation and socio-demographic traits, the outcomes they can demonstrate will be affected by the environment to which they were exposed (Astin, 1970). By providing a rich, purposefully structured environment, and experiences both inside and outside of the classroom that encourage student engagement, we believe Mercyhurst may foster better outcomes than would have been expected if the students had been exposed to another environment.

At Mercyhurst, assessment activities are managed within distinct units throughout the university.
- Institutional Effectiveness and Assessment is led by the Associate Provost in the Assessment and Planning Department
- Administrative and Co-curricular Assessment is led by the Vice President of Strategic Initiatives but delegated accordingly:
  - the Assessment Coordinator for Core Curriculum manages the day-to-day workings of the assessment process
  - two University staff members have been trained to assist the Coordinator
  - the Assessment and Planning Department provides additional assistance and resources as requested.

B. MERCYHURST UNIVERSITY MISSION

Consistent with its Catholic identity and Mercy heritage, Mercyhurst University educates women and men in a culture where faith and reason flourish together, where the beauty and power of the liberal arts combine with an appreciation for the dignity of work and a commitment to serving others. Confident in the strength of its student-faculty bonds, the university community is inspired by the image of students whose choices, in life and work, will enable them to realize the human and
spiritual values embedded in everyday realities and to exercise leadership in service toward a just world.

C. ASSESSMENT AND PLANNING DEPARTMENT (APD)

The Assessment and Planning Department (APD) supports the vision, mission, and core values of Mercyhurst University by providing comprehensive information and reliable institutional data regarding Mercyhurst University which support the development and achievement of comprehensive University goals. APD coordinates the collection and dissemination of essential data about Mercyhurst University which inform decision making, policy making, strategic planning, mandated reporting, and administrative and co-curricular assessment. Additionally, APD is responsible for providing the data about the overall performance of the University; collecting data about our students and their experience of Mercyhurst University from pre-matriculation to post graduate; and analyzing, interpreting, and presenting the data to intended audiences in meaningful and accessible terms.

Purpose
The Assessment and Planning Department provides centralized leadership and support for a variety of activities currently underway within the university and for future initiatives that share the common goal of improving student learning and institutional effectiveness. These activities relate to the assessment of mission-level, student learning, and administrative service outcomes.

Membership
The Assessment and Planning Department is led Dr. Michael Lyden, Associate Provost for Graduate Studies and Vice President for Enrollment Management and Strategic Planning. Responsibilities for each component of the APD is as follows, along with the name of the individual in that role at the time of this printing:

- **Assessment Coordinator, Academic Programs** is responsible for the coordination of academic program assessment. (Dr. Missy Breckenridge)
- **Assessment Coordinator, Core Curriculum** is responsible for the coordination of general education (Core) assessment. (Dr. Dyan Jones)
- **Assessment Coordinator, Administrative and Co-curricular Units** is responsible for the coordination of administrative and co-curricular units. (Dr. Dyan Jones)
- **CIO & Assoc. VP for Strategic Planning** is responsible for strategic plan evaluation. (Jeanette Britt)
- **Director of Assessment** will provide staff support for the student learning component. (Amy Danzer)
- **Director of Institutional Research** will provide staff support for the mission-level and administrative service components as well as providing academic program information. (Sheila Richter)
- **Assistant Director of Assessment** will provide staff support for the student learning component (Chantelle Aubry)
- **Vice President of Academic Affairs** (Dr. Phil Belfiore)
- **Assistant Vice President of Academic Affairs** (Lisa Miller)
II. Strategic Goals

Consistent with its mission, core values and strategic vision, Mercyhurst will continue to pursue the following strategic goals (2013-2020):

- Continue to strengthen our mission commitments, calling us to faith and reason, the liberal arts and the dignity of work, and an understanding of the spiritual and ethical dimensions of everyday activities.

- Establish a reputation for academic excellence that places Mercyhurst among the top 10 percent of all master’s universities in the nation.

- Serve as the region’s premier Opportunity College by providing students with an affordable, quality education and by demonstrating a graduation rate that is among the highest of any two-year institution in the nation.

- Offer a distinctive program of graduate and professional studies, built upon the “theory-to-practice” model, which annually attracts over 1,000 well-qualified applicants from throughout the nation.

- Be widely recognized for achieving a 95 percent student participation rate in significant hands-on learning experiences, including internships, applied research, field work, and service learning.

- Maintain a portfolio of partnership arrangements with private, non-profit, and public entities that is unrivaled among master’s universities in the region.

- Earn national recognition for operational quality and performance excellence.

- Successfully conclude a $50 million capital campaign and reach an endowment value of over $50 million.

A. KEY INITIATIVES

Included here is a summary of the Mercyhurst University Strategic Initiatives. A full list of these initiatives, including item numbers, can be found in the appendix. Assessing the objectives of each administrative and co-curricular unit helps to ensure our progress toward these initiatives.

1) Academic Excellence

Mercyhurst has a well-established record of offering high quality academic programs that meet student demand and serve broader social and economic needs. The University will continue to introduce new programs at the associate, baccalaureate and graduate levels, with a particular focus in the areas of health
and allied health, hospitality, emerging information technologies, and the environment. It will also introduce new interdisciplinary programs at all degree levels, patterned after the recently introduced concentration in Business Intelligence (which combines coursework from the Intelligence Studies and Business Management majors). All programs will reflect Mercyhurst’s unique blend of liberal arts and career-oriented coursework.

The strength of our faculty-student bonds is a central tenet of the Mercyhurst mission and represents a major element of the “value proposition” that the University presents to prospective students. Combined with excellent teaching, this distinguishing characteristic will grow in importance as the University confronts increased competition from community colleges, public universities and providers of web-based instruction.

2) Hands-on/Engaged Learning

Hands-on/engaged learning represents an important bridge between academic excellence and the student experience.

The hands-on, engaged approach to learning is consistent with the Mercyhurst mission in several ways. For one, the Sisters of Mercy sought to act upon their personal convictions by helping others to live fuller and more dignified lives. The concept of the dignity of work, derived from Catholic social teaching, also underscores the close connection between work as a cooperative act of creation and work as an expression of one’s own personal growth and development.

Hands-on/engaged learning is accomplished through such means as applied research, field work, internships, volunteer service, and study abroad. High quality experiences help students to become more actively engaged in their disciplines, to integrate what they’ve learned in extra-curricular settings with what they’ve learned in the classroom, and to acquire the types of practical knowledge and skills that these activities uniquely provide.

3) The Student Experience

The Mercyhurst mission statement refers to an image of students “whose choices, in life and work, will enable them to realize the human and spiritual values embedded in everyday realities”.

A well-rounded, liberal education serves as a foundation for this important, mission-level outcome. However, even the most effective education cannot, by itself, produce these hoped-for results. A student’s human and spiritual values are shaped through a variety of means that extend beyond the classroom to include their religious life, their interactions with fellow students, their involvement in extracurricular activities, and their experiences in work, service and other non-academic settings.

Consistent with the Mercy tradition of whole-person development, Mercyhurst
will remain committed to providing students with an environment that not only supports their intellectual development, but their spiritual and social development as well. Mercyhurst will also ensure that residential, athletic and recreational facilities are safe and well-maintained, and that they properly accommodate students’ needs.

4) **Collaboration beyond the Campus**
Community service is central to the Mercyhurst mission, and the University has a long tradition of community outreach, civic involvement and direct support of local agencies and organizations. One of the most prominent examples of this commitment is the founding of Mercyhurst North East, which has significantly expanded educational opportunities for Erie area residents.

With established academic programs in such fields as intelligence studies, sports medicine, nursing, public safety, education and organizational leadership, as well as recently introduced programs in allied health and public health, Mercyhurst is in a position to substantially broaden its relationships with faith-based and non-profit organizations, government agencies, and business entities.

5) **An Effective Organization**
Trustees, benefactors, alumni, staff and students, and other constituents rely on the institution’s leadership to manage its resources in ways that advance the Mercyhurst mission and accomplish important strategic and operational goals. Mercyhurst leadership will continue to provide this assurance by employing “best practice” management tools and techniques; by operating the institution in an accountable, transparent way; and by keeping constituents informed about significant institutional challenges and opportunities. It will also develop means to appropriately measure, document and communicate key student learning and development outcomes.

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**B. CORE VALUES**

Consistent with the Mercy Mission, the University website describes the Core Values as guiding principles in all realms of the institution:

*Our inspiration leads us to topics of study and engages our perspectives in learning, research and scholarly endeavors. Such inspiration provides the basis of the social-justice dimension of many of our academic and service programs. Indeed, such inspiration directs the goals of our university. We desire to share this inspiration with those who come through our gates, seeking academic excellence, professional expertise, and a future full of hope.*
The Mercyhurst Core Values are

**Socially Merciful**
Mercy restores human dignity, expands our social relations, and empowers us to reach out in compassion to others.

**Globally Responsible**
Globalization challenges us to learn how to steward the resources of the Earth wisely and to act in solidarity with its diverse peoples.

**Compassionately Hospitable**
Mercy hospitality begins with self-acceptance, welcomes peoples of different faith, ethnic, and cultural traditions, and thus builds communities that transcend mere tolerance.

**Intelectually Creative**
Generous, inquiring, and critical habits of mind, which support the aspirations for excellence manifested within the academic community, encourage us in our lifelong search for what is true, good, and beautiful.

**Reflectively Aware**
Our Christian environment encourages self-reflection and contemplation of human behavior, promotes balance of mind, body, and spirit, and ultimately offers the opportunity to develop a moral compass for a life of integrity.

**Ambassadors of Service**

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The following fourteen standards are the foundation of our accrediting body, and therefore play an integral role in informing university processes and assessment practices. A more detailed explanation can be found in the appendix.

**Institutional Context (Standards 1-7)**

**Standard 1: Mission and Goals**
The institution’s mission clearly defines its purpose within the context of higher education and indicates who the institution serves and what it intends to accomplish. The institution’s stated goals, consistent with the aspirations and expectations of higher education, clearly specify how the institution will fulfill its mission. The mission and goals are developed and recognized by the
institution with the participation of its members and its governing body and are used to develop and shape its programs and practices and to evaluate its effectiveness.

**Standard 2: Planning, Resource Allocation, and Institutional Renewal**
An institution conducts ongoing planning and resource allocation based on its mission and goals, develops objectives to achieve them, and utilizes the results of its assessment activities for institutional renewal. Implementation and subsequent evaluation of the success of the strategic plan and resource allocation support the development and change necessary to improve and to maintain institutional quality.

**Standard 3: Institutional Resources**
The human, financial, technical, facilities, and other resources necessary to achieve an institution’s mission and goals are available and accessible. In the context of the institution’s mission, the effective and efficient uses of the institution’s resources are analyzed as part of ongoing outcomes assessment.

**Standard 4: Leadership and Governance**
The institution’s system of governance clearly defines the roles of institutional constituencies in policy development and decision-making. The governance structure includes an active governing body with sufficient autonomy to assure institutional integrity and to fulfill its responsibilities of policy and resource development, consistent with the mission of the institution.

**Standard 5: Administration**
The institution’s administrative structure and services facilitate learning and research/scholarship, foster quality improvement, and support the institution’s organization and governance.

**Standard 6: Integrity**
In the conduct of its programs and activities involving the public and the constituencies it serves, the institution demonstrates adherence to ethical standards and its own stated policies, providing support for academic and intellectual freedom.

**Standard 7: Institutional Assessment**
The institution has developed and implemented an assessment process that evaluates its overall effectiveness in achieving its mission and goals and its compliance with accreditation standards.

**Educational Effectiveness (Standards 8-14)**

**Standard 8: Student Admissions and Retention**
The institution seeks to admit students whose interests, goals, and abilities are congruent with its mission and seeks to retain them through the pursuit of the students’ educational goals.

**Standard 9: Student Support Services**
The institution provides student support services reasonably necessary to enable each student to achieve the institution’s goals for students.
**Standard 10: Faculty**
The institution’s instructional, research, and service programs are devised, developed, monitored, and supported by qualified professionals.

**Standard 11: Educational Offerings**
The institution’s educational offerings display academic content, rigor, and coherence appropriate to its higher education mission. The institution identifies student learning goals and objectives, including knowledge and skills, for its educational offerings.

**Standard 12: General Education**
The institution’s curricula are designed so that students acquire and demonstrate college-level proficiency in general education and essential skills, including at least oral and written communication, scientific and quantitative reasoning, critical analysis and reasoning, and technological competency.

**Standard 13: Related Educational Activities**
The institution’s programs or activities that are characterized by particular content, focus, location, mode of delivery, or sponsorship meet appropriate standards.

**Standard 14: Assessment of Student Learning**
Assessment of student learning demonstrates that, at graduation, or other appropriate points, the institution’s students have knowledge, skills, and competencies consistent with institutional and appropriate higher education goals.

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**D. MERCYHURST STRATEGIC INITIATIVES**

1. **Academic Excellence**
   1.1 **Academic Excellence: Associate Degree Studies**
      1.1.1 Establish new programs in fields that both respond to student interests and support the area's workforce and economic development needs.
      1.1.2 Significantly improve retention and graduation rates by strengthening academic and other student support services.
      1.1.3 Expand evening and weekend schedules to better accommodate the needs of working adults.
      1.1.4 Expand programming delivered through community-based organizations and other off-campus locations.
      1.1.5 Introduce new “bridge” programs that will help under-prepared students to succeed at the college level.
      1.1.6 Maintain net tuition levels that are competitive with those of area public institutions and proprietary schools.
   1.2 **Academic Excellence: Baccalaureate Degree Studies**
1.2.1 Increase the number of degree programs that achieve a national or regional reputation for academic quality.
1.2.2 Introduce innovative inter-disciplinary and multi-disciplinary concentrations that build upon the strengths of current degree programs.
1.2.3 Establish an English as Second Language program to ensure that students whose first language is other than English are well prepared for academic success.
1.2.4 Expand web-based and blended (combination web-based and classroom) course options for adult students as well as traditional students who wish to complete course credits during the summer.
1.2.5 Better communicate the college’s “value proposition” with regard to cost and student outcomes.
1.2.6 Carefully manage class sizes in the core curriculum, reduce the use of adjunct faculty in first year courses, and introduce half-time contracts for adjuncts in selected departments.
1.2.7 Maintain net tuition levels for adult students that are competitive with area public institutions.

1.3 Academic Excellence: Graduate Degree Studies
1.3.1 Establish new campus-based, web-based, and blended (combination web-based and classroom) master’s degree programs that serve unique market niches.
1.3.2 Expand program offerings in locations where there is an established demand for quality career preparation or professional development programs.
1.3.3 Introduce specialized doctoral level programs in fields where Mercyhurst has a clearly established reputation for academic quality.
1.3.4 Maintain tuition levels for area students, who are enrolled in such programs as Education, Administration of Justice, and Non-Profit Management, which are competitive with area public institutions.

1.4 Academic Excellence: University-Wide
1.4.1 Hire and retain effective and highly skilled academic professionals by providing competitive salaries and benefits as well as an excellent quality of work-life.
1.4.2 Ensure that faculty hiring, pay and promotion decisions properly account for their important role in such areas as student recruitment, student research, student placement into graduate and professional programs, and University advancement.
1.4.3 Dedicate a portion of the funds raised through the capital campaign to the endowment of academic department chairs.
1.4.4 Continue to upgrade research and teaching spaces, including science, health and allied health laboratories.
1.4.5 Reduce course load requirements for faculty who are engaging in scholarly activities.
1.4.6 Expand faculty access to significant databases and other resources that support and facilitate scholarship.
1.4.7 Establish the capacity to design, develop and deliver high quality web-based courses and programs.
1.4.8 Become more effective in telling the “Mercyhurst Story” by increasing investments in communications, public relations, and marketing.
1.4.9 Use the results of assessment activities to continue to enhance student learning.

1.5 Academic Excellence: Other Activity
2 Hands-on/Engaged Learning

2.1 Hands-on/Engaged Learning: Associate Degree Studies
   2.1.1 Implement instructional strategies and methodologies that will more actively engage students in the learning process.
   2.1.2 Establish a second-year capstone course or project in all majors.

2.2 Hands-on/Engaged Learning: Baccalaureate Degree Studies
   2.2.1 Strongly encourage all students, including adult students, to participate in at least one high-quality, hands-on learning activity during their course of studies.
   2.2.2 Establish a senior year “capstone” course or project in all majors.

2.3 Hands-on/Engaged Learning: Graduate Degree Studies
   2.3.1 Ensure that hands-on, engaged learning remains an essential element of all graduate programs, and clearly communicate this distinctive feature in all marketing materials.

2.4 Hands-on/Engaged Learning: University-Wide
   2.4.1 Ensure that all hands-on learning activities, including internships and service learning, are developed in consultation with the appropriate faculty, and that they adhere to high standards of quality and academic integrity.
   2.4.2 Introduce non-credit experiential learning and service learning options so that motivated students are not discouraged from participation because of cost.
   2.4.3 Adopt best practices in “electronic portfolio” technologies that will help students to document their experiences, synthesize and assess what they have learned, and easily retrieve information for use in project or program reports, internship or co-op evaluations, job search campaigns or other purposes.
   2.4.4 Develop methods and tools that will help the institution to document and assess the short-term and long term student outcomes associated with hands-on/engaged learning.

2.5 Hands-on/Engaged Learning: Other Activity

3 The Student Experience

3.1 The Student Experience: Associate Degree Studies
   3.1.1 Strengthen student life programming, including campus ministry, for resident, commuter and adult students.
   3.1.2 Expand intercollegiate and intramural athletic programs.
   3.1.3 Create a multi-purpose athletic and event center that will meet student and University needs and provide an additional event venue for the North East community.
   3.1.4 Create an activities center that will accommodate expanded social, recreational and wellness programming for students.
   3.1.5 Maintain on-campus housing facilities that are attractive and conducive to student interaction.

3.2 The Student Experience: Baccalaureate Degree Studies
   3.2.1 Maintain on-campus housing facilities that are safe, attractive and reasonably priced.
   3.2.2 Continue to strengthen student life programming for both resident and commuter students.
   3.2.3 Create a space on the east campus that will help promote a greater sense of community among students.
3.2.4 Ensure that the role of athletics at Mercyhurst is appropriately recognized and valued, and that athletic facilities are well suited for their intended use.  
3.2.5 Actively promote study abroad opportunities, including the Dungarven program.

3.3 The Student Experience: Graduate Degree Studies
3.3.1 Implement programming that promotes interaction among graduate students, and that supports their active engagement in the life of the University.

3.4 The Student Experience: University-wide
3.4.1 Maintain faculty, staff, undergraduate and graduate student bodies that are economically, culturally and racially diverse.
3.4.2 Increase opportunities for interfaith and ecumenical dialogue and programming while maintaining a campus ministry program that supports a strong Catholic faith community.
3.4.3 Offer opportunities for all students to participate in college governance, leadership development, spiritual enrichment, wellness, community service, and recreational activities.
3.4.4 Use the results of assessment activities to strengthen our co-curricular activities.
3.4.5 Strengthen and expand job and career placement services by better utilizing alumni networks.
3.4.6 Maintain information technology resources that reasonably accommodate the needs and interests of students.
3.4.7 Ensure that Erie and North East campus buildings and grounds remain safe and well-maintained, and that adequate resources are committed to the University’s long-term development needs.

3.5 The Student Experience: Other Activity

4. Collaboration beyond the Campus
4.1 Collaboration beyond the Campus: Associate Degree Studies
4.1.1 Work with area health care providers to expand training and employment opportunities for minorities and other groups who have traditionally been underrepresented in the health care professions.
4.1.2 Expand current initiatives in the area of public safety and security, and establish new relationships with the local manufacturing, tourism and hospitality industries.
4.1.3 Pursue “dual enrollment” and other cooperative arrangements with local charter schools, catholic schools, public high schools, and area vocational technical schools with the goal of expanding lower-cost educational options for area students.
4.1.4 Establish more formal ties with area economic development and workforce training agencies.
4.1.5 Develop articulation agreements with selected four-year colleges and universities.

4.2 Collaboration beyond the Campus: Baccalaureate Degree Studies
4.2.1 Establish agreements with selected universities in other nations that will allow Mercyhurst students to pursue unique academic majors, minors, and degree programs.
4.2.2 Increase the number of articulation agreements with prominent graduate and professional schools.

4.3 Collaboration beyond the Campus: Graduate Degree Studies
4.3.1 Introduce articulation agreements with selected undergraduate institutions.
4.3.2 Work with area public and non-profit organizations to establish new professional development opportunities for their employees.
4.3.3 Establish agreements with governmental agencies, non-governmental agencies and business firms, both in this country and overseas.

4.4 **Collaboration beyond the Campus: University wide**

4.4.1 Establish a “University Partnership Office” that will serve as a clearinghouse for University partnership agreements, provide administrative and staff support to academic departments that are pursuing such agreements, and provide advice on legal, financial and related matters.
4.4.2 Ensure that faculty hiring, pay and promotion decisions properly account for their important role in building and maintaining partnership relationships and in securing external grant or contract funding.
4.4.3 Reduce course load requirements for faculty who are developing or managing substantial partnership activities.

4.5 **Collaboration beyond the Campus: Other Activity**

5. **An Effective Organization**

5.1 **An Effective Organization: University-wide**

5.1.1 Work with academic and administrative leaders to identify and implement best-practice approaches to assessment, continuous improvement and organizational renewal.
5.1.2 Regularly communicate key indicators of the institution’s effectiveness in achieving its Mercy centered academic mission, such as graduation rates, and in effectively managing its resources, such as the proportion of revenues invested in student learning.
5.1.3 Make maximum use of information and communication technologies to decrease administrative expense and improve service to students.
5.1.4 Ensure that on-going resource allocations are aligned with, and support, our mission, key operational objectives, assessment findings and strategic goals.
5.1.5 Update the strategic plan on a regular basis, and ensure that it informs short and long term budgeting decisions.
5.1.6 Utilize our alumni as a resource for partnerships and internships.
5.1.7 Adopt or create ways to assess and document the key learning and development outcomes of Mercyhurst students.
5.1.8 Continue the University’s commitment to cost-saving, environmentally responsible green facility design and meet the equivalent of LEED silver certification standards for all new construction.
5.1.9 Consistent with the University’s pledge to the College and University Presidents’ Climate Commitment, create a long term plan to reduce emissions resulting from the transportation choices of student, employee and the University.

5.2 **An Effective Organization: Other Activity**
III. Assessment Guidelines

Assessment is an ongoing, iterative process at which we will improve with time and practice. Assessment can and should be integrated into the life of the university, and as such, conducted on multiple levels – at the student, program or department, and institutional levels. Assessment at the administrative and co-curricular levels must be led by the directors and staff in those units, with support from administration. Since all aspects of what a unit does is multi-dimensional, integrated, and often revealed over time, multiple methods of assessing growth are helpful. These tenets must be balanced with the need for assessment to be cost effective both in terms of money spent and time allocated. Assessment plans and processes, as well as the proposed changes based upon their results, must be respectful of Mercyhurst’s wide academic offerings of liberal arts and professional education programs. Assessment will not be used for employee evaluation purposes. Staff participation and ownership is essential in the success of the administrative assessment process.

A. BENEFITS OF ASSESSMENT

We need to determine what matters most, measure it, and use the results to become more effective as individual units and as an institution. By continually improving what we do and how we do it, we accomplish our mission. It is also required for accreditation agencies.

A good assessment process can answer three related questions:
- What are we trying to do?
- How well are we doing it?
- How are we using what we discover to improve what we will do in the future?

When we assess what we do effectively, senior administration will be able to:
- Evaluate and allocate resources efficiently based on evidence
- Increase effectiveness of providing direction and deciding policy
- Track and demonstrate progress and contributions to the university
- Create cohesive and meaningful strategic plans and track their achievement
- Identify the degree of overlap among units and gaps among services
- Support institutional goals and core values
- Contribute to a culture of continuous improvement and excellence

As a result, Mercyhurst will be able to:
- Obtain better information to evaluate policies and practices
- Draw on evidence to make appropriate changes
- Use results to seek grants, foundation funding, or targeted donations
- Demonstrate responsiveness to governmental bodies, accrediting agencies and public needs and concerns
- Increase student recruitment and retention
- Demonstrate how the university is making a difference
- Improve communication with stakeholders
B. COMPONENTS of ASSESSMENT

Assessment strategies vary between different institutions, and the variations can seem endless. This section is meant to detail the assessment process used at Mercyhurst University, and provide a set of definitions and explanations of the various components of assessment.

The primary framework of the assessment has the Mission Statement of the unit as a foundation. From the Mission Statement, a set of Goals can be developed that are consistent with the mission and relevant to the current needs of the unit. Objectives are the steps that a unit takes as it works toward achieving those goals. And because all objectives must be measurable, they require a set of measures, targets, and findings that help us interpret the data. Each component of this assessment process is described in detail below. A chart providing an overview of each piece and how they fit together is shown first.
The Unit Mission Statement is the highest level of assessment. This is the mission statement of the unit (not the division or university), and can be thought of as the biggest explanation of what your unit does. It is the overarching guide to your unit’s role at the university.

Goals are the broadest description of what your unit is striving to achieve. Goals are, in a sense, grand ideas - they are what you strive to achieve over a long period of time. Goals themselves are not measurable, but they guide you to take certain actions.

The Objectives are the actions that you are going to take that will help you work toward your goals. Each unit should have a minimum of three objectives, and each one must be tied to at least one goal. Objectives are often thought of as strategies that will push your unit in the direction of your goals. Objectives must have two qualities: they must represent an action (there must be a verb!) and they must be measurable!

The Measures are the tools that you will use to measure your objectives. There are many types of tools (see below for examples), but the most important thing is that the tool you are using addresses the objective you are measuring. When you are proposing a measure, you should include from what source data will be collected as well as how and when you will collect it.

Targets describe the expected performance on a given measure. Targets should be reasonable, neither too high to be attainable or too low to be worthwhile, and should be set with the goal of helping you interpret the data from your measures.

The Findings are a summary of the data you collected. The findings must be reported so that they can be compared to the target. Along with describing whether the target was met, partially met, or not met, findings can include a narrative explanation of what you learned from the data.

The Action Plan describes how you will use the results of the assessment to improve your unit in the future. Action plans must be completed for any target that is not met, and are optional for all other findings. See Forms section for the Action Plan template. Note that action plans include start and end dates, priority levels, details of implementation, and resource and budget information.
1) Mission Statements
A mission statement is a description of what a unit or office does and what philosophy and principles guide it. This statement should be succinct, but should still convey how the unit supports the mission of the institution. A mission statement should only be rewritten when an entity experiences a significant change so these sentences should be constructed to stand for the foreseeable future. A few questions to consider in formulating the mission of your unit include:

- What is the primary function of your unit?
- What activities make up the central part of your operations?
- What should those you serve experience after interacting with your unit?

Many units already have an existing mission statement. If a director feels that the mission statement needs to be updated, they should contact their Vice President.

2) Goals
A goal describes what the unit will accomplish in order to meet its mission. A goal is an overarching principle that guides decision-making and helps the staff to see the big picture of what the unit is trying to achieve. They are written in broad, non-measurable terms, and may take many years and a great deal of effort to accomplish. As such, goals do not change every year, but they may change when there is a restructuring of the unit or when additional responsibilities are given.

3) Objectives
Objectives are the actions that you will take to work toward realizing your goals. Where as the mission statement and goals are broadly stated, objectives are narrow, detailed, and exact. They describe very specifically what you intend to do in your unit, and they must be explicitly tied to one of your goals. Because goals are so wide-reaching, it is possible and perhaps even likely that more than one objective will be tied to each goal. Importantly, all objectives must be measurable. This means that it must be possible to gather evidence, either qualitative or quantitative, that speaks to how well you’ve met your objective.

There are three overarching categories of objectives. They are outcome statements, process statements, and satisfaction statements.

- **Outcome statements** concern gains you want those you serve to make. These are used particularly often in academic units in the form of a student learning outcome. However, they can be equally useful in administrative and co-curricular units as well. For example, you may want to consider what someone can do after interacting with your unit.
- **Process statements** concern the accomplishments of your unit’s functions. These may include: level or volume of activity, efficiency with which you conduct the processes, or compliance with external standards or regulations.
- **Satisfaction statements** describe how those you serve rate their satisfaction with your unit’s processes or services.

There is no requirement about types of statements that you can or cannot use - the only important aspect is that they fit the needs of your unit as you work toward your goals.
Writing Objectives
SMART is an acronym that is often used in both academia and the corporate world to determine how well an objective is formulated. An objective is a SMART objective when it is:

**Specific** – Be clear about what your unit plans to accomplish, as well as when, where or how. For example, “we will expand our services” does not specify how or by how much or for how many customers the services will be expanded. Words such as *develop, encourage* and *enhance* lack specificity. Action words such as *locate* or *reduce* make objectives more specific.

**Measurable** – Quantify your objective as to targets and benefits, so that your unit can determine if it has reached the objective.

**Achievable** – Know the objective is something that your unit can accomplish. It is fine to accomplish your objective in incremental steps over several years.

**Realistic** – Make sure the objective is something that can be done practically in a specific time frame or for a specific amount of money.

**Time-bound** – When will the objective be completed? Tie the objective to a specific time frame.

As you can see, though there is a set of requirements for objectives, there is a great deal of openness in terms of customizing them to meet the needs of your unit. In drafting objectives, it may help to create a flowchart of your unit’s work processes to determine what your unit will accomplish and what students, faculty, staff, and others will think, know, or do following the provision of the service. The following list of questions (and some potential answers) is meant only to serve as a few examples of what you may want to consider as you are writing your unit’s objectives.

- **What objective are you seeking to assess?**
  - Unit productivity/output
  - Level of satisfaction
  - Unit efficiency

- **Why are you conducting the assessment?**
  - To enhance management effectiveness/performance
  - To improve quality; e.g., reduce error rates
  - To track progress over time

- **How will the data be used?**
  - To improve programs or services
  - To develop a proposal
  - To improve student outcomes

- **What are the most important results or impacts that should occur as a result of your unit’s activities?**
- **What are your critical work processes and how should they function?**
- **What does the end user experience through interaction with your unit?**
Administrative objectives at Mercyhurst should reflect what the unit’s decision makers have identified as the important initiatives or improvements for the year (or longer). Entities should not use the sustaining of their normal operations as part of their initiatives, but should focus on improvements and special projects that will enhance the unit or the university. Objectives can be active across many assessment cycles/years, or they can be added/ended/edited between cycles.

Objectives are also the connections that allow your unit to help fulfill Mercyhurst’s core values, Mercyhurst’s strategic plan, Middle States accrediting standards and, depending on your unit, standards put in place by national organizations such as libraries, student services organizations, etc. If the objective DIRECTLY addresses one or more of these, you should note which one (or more) and specifically describe how the objective addresses it.

**Objective Formula**
The following is a general formula for writing objectives. Following this is not required but may be helpful.

\[
\text{Objective} = \text{Target/subject} + \text{verb/action} + \text{object} + \text{modifiers}
\]

Administrative Objective Example: Increase the research skills of Mercyhurst researchers by developing and conducting workshops and seminars on analyzing research.

*Increase (verb) Mercyhurst faulty (object) research productivity (target) by supporting travel to conferences. (modifiers).*

**4) Measures**
Once you establish your unit’s objectives, you must then define and identify the sources of evidence you will use to determine whether you are meeting those objectives. For each objective, create measures that help your unit in making critical decisions about its processes and services. These measures should be observable, measurable, actual evidence that will tell you how well each objective has been met so you will know if you are successful. You must detail what will be measured and how it will be measured.

In collecting this evidence, the unit should learn two things: whether the objective is being met and where there is room for improvement toward the objective. Measures may not tell you why objectives are or are not being met. However, they should be specific enough to answer *whether or not* the objective is being met. When the expected levels of achievement are not met, the measures should help lead the entity to identify problem areas and decide on actions to improve the results.

Common types of assessment measures include *attitudinal measures, direct measures, and external measures*. *Attitudinal measures* examine the satisfaction of those you serve. *Direct measures* include counts of your unit’s services. *External measures* have a component of validation from an outside source, such as a neutral party, auditor, or set of professional standards. Again: it is not necessary to use any certain type of measure, but rather *it most important that you choose a measure that appropriately fits your objective.*
A following section provides a list of assessment measures and techniques that are commonly encountered in administrative and co-curricular assessments. As you choose a set of measures to accompany your objectives, here are some examples of questions you may want to consider:

- **Information that units often collect can include:**
  - Satisfaction surveys and other self-report information
  - Reports of others (supervisor evaluations, etc.)
  - Comparisons to national standards for the unit

- **From whom will the data be collected?**
  - Incoming students
  - Current students
  - Students who stopped or dropped out
  - Graduating students/recent graduates
  - Alumni
  - Employers
  - Faculty
  - Staff/ Administrators
  - Parents
  - Other institutions
  - Professional associations/organizations

- **From what sources will the data be gathered?**
  - Datatel
  - In-house surveys
  - National surveys
  - Internal unit data (documents, memos, reports, etc.)
  - Focus groups
  - Other

Over time, it is helpful to build an inventory of existing evaluation and assessment activities. Search for or ask colleagues in similar units at other institutions how they assess their efficiency and effectiveness. Eventually, it is helpful to have multiple measures. A composite of results can yield a more realistic picture of your unit’s performance rather than relying on only one measure. Further, a single measure may be used for more than one objective (for example, a survey may speak to more than one aspect of the service you provide, and therefore be able to measure more than one objective).

As you are choosing measures, it is also important to consider **when and how** you will put your assessment plan into action. You must set a **schedule** for conducting assessment activities. Some assessments may take place each term/semester, others annually and others even on an every other or every third year basis. A few may be a one time or special purpose data collection. Carefully plan how you will gather the data so you can ensure the data is collected on time, from the right group(s) and is useable for assessment purposes.
5) Targets
After a measure has been thoughtfully chosen, the next step is to set a target. Targets should flow easily from the measures that are set, in that the evidence collected in the measure will speak directly to the target. Targets have a single purpose, which is to communicate clearly the level of expected accomplishment for the particular measure. Targets must always indicate the expected achievement in this single, current assessment cycle/year.

It is important to note that targets must be clear not just in numbers, but in words. “Satisfactory” and “successful” are positive, but they are not commonly understood. A better way to define these concepts is to share the rating scale. Does “satisfactory” mean 3 out of 5 points? Does “successful” mean fewer than 5 mistakes? Define a target so that the meaning is easily understood and that it can clearly be supported with gathered evidence. Some examples of clearly defined targets are:

- 95% of our users will be “very satisfied or satisfied” with our services.
- At least 80% of eligible employees will participate in training.
- 90% of the transcripts will be sent within three days.
- 90% of the forms will be processed without errors.

Setting targets can be daunting - you want to challenge your unit, but you also want to set realistic and achievable goals. Remember: our assessment is not focused on how many targets are met or not met, but rather ensuring that we are carrying out assessment practices in useful and sustainable ways. So, it is suggested that you always aim for a criterion level that stretches your unit’s performance. Targets can be adjusted over different assessment cycles, so don’t be afraid to increase your expectations over time. There is no easy rule for determining what the targets should be for any objective. Generally, an entity either sets a target based on a current level of achievement or a desired (usually higher) level of achievement.

Target Formula
The following is a general formula for writing objectives. Following this is not required but may be helpful.

\[
\text{Target} = \text{Level} + \text{subject} + \text{action} + \text{object} + \text{modifiers}
\]

Target Example: 90% (level) of first year experience students (subject) will rate on a customer satisfaction survey (action) their Preview experience (object) as a 3 (satisfactory) or better on a 5-point scale (modifiers).

6) Findings
After all of your goals, objectives, measures and targets have been set, it is time to gather evidence. Putting your measures into place and then analyzing the findings is the next step in the assessment process, and one that leads to the report of findings.

Once your evidence/data has been collected, the findings ask you to report one seemingly-simple thing: *how successful were you?* Compare the observed achievements with your intended
achievements: how well did you meet your objectives? Did you meet, partially meet, or not meet your target?

In reality, reporting findings can go beyond a simple met or not met designation. Examining findings requires an objective eye and many conversations with the members of your unit. As you discuss the assessment results and their implications, celebrate when the unit has accomplished what it planned to accomplish! Come to a clear understanding and agreement on areas that still present opportunities for growth and improvement.

Some questions that you might want to consider as you turn your evidence into findings are listed below.

- **Big over-arching assessment questions:**
  - What did you learn from the data?
  - What future actions will you take?
  - What changes have you made (or will you make) based on the findings?
  - What are the budgetary implications?

- **Consider the objectives that you measured:**
  - Do the objectives need to be modified for next cycle/year?
  - If the objective is still relevant, do you need to choose a different measure to speak to that objective?
  - Should you set higher targets for future cycles/years?

- **How will you use your results?**
  - Should you revise the organizational structure or work duties?
  - Do resources need to be allocated or reallocated?
  - Should administrative procedures be revamped?

Remember: The assessment process is not completed until the “loop is closed” and the results are used to make improvements to your unit. This final piece of the assessment cycle is arguably the most important one - it allows us to put the assessment we conducted to good use!

The decisions made regarding the findings will be used to create action plan(s) for the next year also may lead to a revision of your unit’s objectives for the next year. The best time to update objectives is usually in June, right after you’ve reviewed the data from the previous year.

7) **Action Plans**
An Action Plan outlines the actions that you will take as a result of your assessment findings. *An Action Plan is required for any target that is not met. Action Plans are optional for any target that is met, but may be completed if you feel that the findings warrant action.*
The *Action Plan Template* is in the Forms and Documents section of this handbook. The information needed for the Action Plan includes:

- The objective, measure, target, and finding
- A fairly detailed description of the plan
- Whether the action is planned or in progress
- The priority of the action plan (high, medium, low) as rated by the unit director
- Projected completion date
- The responsible party or group (by title or position, not by name)
- Non-budgetary resources needed (includes things like space, reallocating personnel assignments, or other non-monetary resources)
- Budgetary resources needed

Action Plans are due to the Assessment Coordinator and should accompany your finalized Assessment Profile by May 31 of each year. The Coordinator will follow up on Action Plans, and a report will be requested upon the completion of the Action Plan and/or yearly. The Action Plan will then have the status moved to finished, on-hold or terminated. In some cases, it may remain in progress.

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**C. SELF-STUDY**

While a yearly assessment plan is crucial to the continued monitoring of unit functions, it is also necessary and worthwhile to look at the larger picture. As such, each administrative and co-curricular unit is required to undertake a Unit Review Self Study every five years. This will help ensure that units are functioning in a way that is consistent with the mission of the university and are focused on continuous progress by highlight strengths and identifying areas of improvement.

The components of the Unit Review Self Study are as follows:

1. **Unit Mission** - How does the unit align with and contribute to the university mission? Issues affecting the fulfillment of the Strategic Plan and Core Values can also be discussed in this section.
2. **Unit Assessment Overview** - Taking a broad look at the objectives assessed over the previous four years, is there evidence that objectives are being met at the expected level? What assessment-driven changes have been made? Were they successful?
3. **Staff Profiles** - Discuss the staff make up, including relevant information such as area of expertise or focus within the unit, responsibilities, etc.
4. **Unit Resources** - Discuss the resources available to your unit including staff and support staff, technology and equipment, physical space, etc.
5. **Trends in the Field** - If applicable, discuss the trends in larger scope of your field (for example, through professional conferences or associations, external standards or reporting agencies, or through remote colleagues).
6. **Summary of Findings** - A synthesis of all the above information that provides an executive summary of the Unit Review Self Study.

7. **5-Year Action Plan** - This action plan should outline your assessment plan for the next five-year cycle, including unit initiatives and potential objectives to be assessed. The action plan should also propose a timeline for implementing any necessary substantial changes and include resource allocations, both budgetary and non-budgetary.

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**D. ASSESSMENT TECHNIQUES**

*Based on a resource from the NC State University Office of Assessment for co-curricular units*

Various assessment techniques exist, but the most important factor to consider is whether a technique appropriately speaks to the objective you are trying to assess. The following list is not meant to be comprehensive, but instead provides a sample of existing techniques that may or may not be useful to administrative and co-curricular units across campus.

**Information about Students/ Clients/ Participants:**
- Enrollment and participation rates
- Retention trends
- Demographic data on participants (gender, ethnicity, class, etc)
- Comparisons to past measurement

**Information about the unit structures:**
- Staff workload
- Staff compensation ranges
- Staff qualifications
- Space utilization studies
- Cost and spending trends
- Audit statistics

**Information about the unit’s services:**
- Utilization surveys and evaluations
- Number/count of services offered
- Ratio of planned to achieved services
- Capacity studies
- Responses times (for requests and inquiries)
- National and professional organization data comparisons
- Projected completion dates and timelines (for major projects)
### E. ASSESSMENT TIMELINE

<table>
<thead>
<tr>
<th>Steps</th>
<th>Month</th>
<th>Suggested Activities</th>
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</table>
| Prepare for the Assessment Cycle           | June        | • Review data from previous assessment cycles  
• Discuss successes highlighted by assessment with your unit  
• Discuss improvements for your unit in the future  
• Create measurable objectives for the next assessment cycle  
• **Submit your Assessment Plan to the Assessment Coordinator. Include revised goals (if necessary), objectives (new and revised/continuing), measures, and targets**                                                                                   |
|                                            | **JULY 1**  |                                                                                                                                                                                                                                                                                                                                                      |
| Collect Assessment Data                    | August      | • Refine and modify measures if needed                                                                                                                                                                                                                                                                                                               |
|                                            | September-April | • Collect data using the measures identified in your Assessment Plan                                                                                                                                                                                                                                                                                  |
|                                            | April       | • Begin, continue and complete data collection for Spring Semester                                                                                                                                                                                                                                                                                    |
| Analyze Data & Report Results              | May         | • Evaluate the collected data  
• Discuss results with the unit staff members  
• Develop strategies to improve your unit based on assessment data and analysis  
• Finalize the assessment report including decisions made and changes to program and budget if appropriate  
• **Submit your Annual Progress Report to the Assessment Coordinator. Include findings and Action Plans (if necessary)**                                                                                                                  |
|                                            | **May 31**  |                                                                                                                                                                                                                                                                                                                                                      |
IV. WEAVE

A. WHAT IS WEAVEonline?

WEAVEonline is a central repository for assessment information where faculty and staff can learn about and document assessment and quality improvement processes, procedures, and evidence. The software records assessment practices in academic, administrative, and educational support areas. This system is also helpful for tracking assessment information for accrediting groups (such as Middle States) and annual reports. In addition, entered data can be linked to Academic Program Outcomes, General Education/Core Curriculum Outcomes, and the Strategic Plan.

WEAVE is a software application that addresses the need to develop and maintain continuous improvement processes for both the academic and administrative structures within an institution of higher education. It guides and provides for the alignment of multiple processes, including assessment, planning, accreditation, budgeting and institutional priorities. Weave has been adopted for use for all Mercyhurst campuses, programs & services. WEAVE allows for timely feedback, and eliminates the need for cumbersome and labor-intensive reporting systems. It incorporates all of the steps in the assessment feedback loop, and ensures that all student-learning outcomes are being measured and evaluated. These features also thoroughly address accreditation requirements. The program easily generates several types of accreditation related reports, lessening the burden of that process.

B. WEAVE’S PRINCIPLE OF ASSESSMENT

The WEAVE system was designed for assessment, and as such models our assessment process very well. In fact, the WEAVE acronym is rooted in assessment:

Write expected (objectives)
Establish criteria for success (measures & targets)
Assess Performance
View assessment results (findings)
Effect improvements (action plans)
Just as our assessment processes are built into recurring cycles, Weave also uses a cyclic ordering process to help us manage our evidence goals, objectives, evidence collection, targets, and action plans. The WEAVE cycle runs on the fiscal year with the articulation of objectives, measures, and targets for the upcoming academic year. The cycle ends with submission of findings and action plans, and a new cycle begins again.

Of particular importance for the units is WEAVE’s ability to propagate goals, objectives, and measures into the next assessment cycle as necessary. This provides continuity and the opportunity to look at progress toward achieving a single objective over the course of multiple assessment cycles. Any assessment component can also be ended at the end of a given assessment cycle if the objective has been clearly met and/or is no longer useful for a unit. As you plan for upcoming cycles, remember to consider what components you’d like to end and what components you’d like to carry forward.

C. WEAVE CYCLES
This chapter contains copies of all documents, forms, and directions that are relevant to administer and co-curricular unit assessment. These resources are also available in their most recent forms on the Mercyhurst Portal, under the Assessment and Planning site. The documents are presented in the following order:

*Assessment Profile (sample of the Excel file)*
Directions for completing the Assessment Profile
*Action Plan Template*
Directions for completing the Action Plan Template
*Budget Request forms* (created and managed by the Institutional Effectiveness Committee)
<table>
<thead>
<tr>
<th>Goal</th>
<th>Measurable Objective</th>
<th>Connected to Strategic Plan? (If no, leave blank. If yes, list the number and explain.)</th>
<th>Connected to Core Values? (If no, leave blank. If yes, list the Value and explain.)</th>
<th>Connected to External Standards? (If no, leave blank. If yes, list the Standard and explain.)</th>
<th>Measure</th>
<th>Collection Timeline</th>
<th>Target</th>
<th>Findings</th>
<th>Target Met (Met, Partially Met, or Not Met)</th>
<th>Action Plan (Y or N)</th>
<th>Budget Implications (Y or N)</th>
<th>Objective Status (Continue or End for next cycle)</th>
<th>Comments</th>
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Directions for completing the Assessment Profile

The Assessment Profile is meant to be a streamlined reporting system for all administrative and co-curricular units. The Profile template is in Excel format, and is color-coded in two sections: the Blue section is to be filled out in the planning phases of assessment, and the orange sections is to be filled out during the reporting phases of assessment. After each phase, the Profile must be sent to the coordinator for review and feedback.

The following list is a guide to what information should be shared in each of the numbered columns of the Assessment Profile. Please remember that each row represents a separate assessment objective; administrative and co-curricular units must report on at least three objectives each year.

**COLUMNS 1 - 8** - filled out in the assessment planning phases and due July 15 of every year.

**Column 1: Goal**
State the unit goal that is being addressed with this outcome. The wording should be consistent with your goals from previous assessment documents.

**Column 2: Measurable Objective**
State the objective being assessed during this cycle. Remember that the objective must include a verb that indicates what you are doing, and it also must be measurable.

**Column 3: Connected to Strategic Plan (optional)**
If your objective is explicitly connected to any part of the strategic plan, please include the number (e.g. 5.1.2) and an explanation of why this objective uniquely speaks to that component of the plan.

**Column 4: Connected to Core Values (optional)**
If your objective is explicitly connected to any of the Mercyhurst Core Values, please explicitly state which and an explanation of why this objective uniquely speaks to that Core Value.

**Column 5: Connected to External Standards (optional)**
If your objective is explicitly connected to any external standards please indicate which and explain.

**Column 6: Measure**
State what measurement tool you will be using to assess this objective (*i.e. participation rates, % cost reduction, number of staff training hours, survey results*)

**Column 7: Collection Timeline**
State when and/or how often the measurement will take place? (*i.e. continually throughout the academic year, biannually in October and April, at the end of the enrollment period*)
**Column 8: Target**

State the expected outcome of the measurement tool. *(i.e. 10 people attend each event, 10% decrease in cost of office supplies, a minimum of 600 hours of continuing education and training for staff members, 70% of respondents are “satisfied” or “extremely satisfied” with our service)*

**Columns 9 - 14** - filled out in the assessment reporting phases and due May 30 of every year.

**Column 9: Finding**

State the actual outcome of the measurement tool. The wording of the finding should match the wording of your target. *(i.e. between 14 and 26 people attended each of the 6 events, office supplies costs were reduced by 8%, the staff members participated in continuing education and training for a combined 1420 hours, 82% of respondents were either “satisfied” or “extremely satisfied” with the event)*

**Column 10: Target Met?**

Indicate whether the target was *met*, *partially met*, or *not met*. A *partially met* status should only be used if one or more pieces of a multi-part objective was not met, or if a finding is within 2% of the target.

**Column 11: Action Plan?**

Indicate Y for “yes” or N for “no”, remember that any objectives where the target was not met are required to have an action plan. In some cases where the target was met, a unit may voluntarily submit an action plan to be followed-up on by the assessment coordinator.

**Column 12: Budget Implications?**

Indicate whether the Action Plan being filed for this objective has a budget implication. If yes, please state the dollar amount (no explanation necessary here). If no action plan exists for the object, this column can be left blank.

**Column 13: Objective Status**

Indicate whether you would like to *Continue* the objective in future iteration cycles or whether it should *End* at the end of this assessment cycle.

**Column 14: Comments (optional)**

This section can be used to include any commentary on the assessment that is not otherwise accounted for in the template.
Mercyhurst Administrative and Co-Curricular Assessment: Action Plan Template

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<thead>
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<th>1) Unit</th>
<th>2) Assessment Year</th>
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<th>8) Projected Completion Date</th>
<th>9) Responsible Person/Group</th>
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<td>_____ LOW _____ MED _____HIGH</td>
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<table>
<thead>
<tr>
<th>10) Non-Budgetary Resource Allocation?</th>
</tr>
</thead>
<tbody>
<tr>
<td>_____ No _____ Yes (If yes, explain)</td>
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</tbody>
</table>

<table>
<thead>
<tr>
<th>11) Requested Budget Status:</th>
</tr>
</thead>
<tbody>
<tr>
<td>_____ No request _____ One-time _____ Recurring</td>
</tr>
</tbody>
</table>

If one-time or recurring indicate Budget Amt. requested: _____________ & complete a Request for Additional Budget Funds
Directions for completing the Action Plan Template

Section 1: Unit
List the name of your administrative or co-curricular unit

Section 2: Assessment Year
State the year (cycle) that the related assessment was conducted.

Section 3: Measurable Objective
State the objective that requires the action plan and which year the assessment was conducted. This should identically match the information on your Assessment Profile.

Section 4: Target
State the target that was set for this objective. This should identically match the information on your Assessment Profile.

Section 5: Finding
State the findings for this objective. This should identically match the information on your Assessment Profile.

Section 6: Description of Action Plan
Describe in sufficient detail the nature of the actions that will be taken by your unit in regard to the objective that was assessed.

Section 7: Unit Priority
Please mark the priority that your unit will give to this action plan. This is particularly important if you have more than one action plan open at a time.

Section 8: Projected Completion Date
State the projected completion date for this action plan. Realizing that some necessary actions are short term and some are much longer processes, please make sure the nature of this timeline is reflected in your Description of the Action Plan.

Section 9: Responsible Person/Group
State the title/role of the responsible parties (it is not necessary to include the name of any individuals).

Section 10: Non-budgetary Resource Allocation
State whether or not this action plan involves non-budgetary resource allocation(s). These types of resource allocations may include: reassigning staff to new positions, time commitments, rearranging existing resources, space, etc.

Section 11: Requested Budget Status
If your action plan will be submitted with an accompanying request for funds, please fill out this section completely.
<table>
<thead>
<tr>
<th></th>
<th>Missing</th>
<th>Does Not Meet Standard</th>
<th>Meets Standard</th>
<th>Exceeds Standard – in addition to Meets Standard</th>
<th>Recommendations</th>
</tr>
</thead>
<tbody>
<tr>
<td>Mission</td>
<td>None</td>
<td>Statement does not clearly describe the area’s purpose</td>
<td>Clearly states broad aspects of the area’s function and Aligned with university mission</td>
<td>Includes purpose, primary functions, activities, and stakeholders Differentiates from missions of other units or divisions Expands on the university mission</td>
<td></td>
</tr>
<tr>
<td>Goals</td>
<td>None</td>
<td>Not aligned with mission or Too specific (objective)</td>
<td>Aligned with mission Appropriately broad</td>
<td>Will guide long-term decision making Addresses unit’s most important functions</td>
<td></td>
</tr>
<tr>
<td>Objectives</td>
<td>None</td>
<td>Not aligned with mission or Not measureable</td>
<td>Aligned with mission and Clearly measureable</td>
<td>Includes operational initiatives that resulted from previous assessments Responsive to new information or changing environment</td>
<td></td>
</tr>
<tr>
<td>Measures</td>
<td>None</td>
<td>Does not fit the objective or Does not describe data collection process</td>
<td>Content to be assessed fits objectives and Data collection process is briefly described</td>
<td>Designed to promote improvement Clearly articulated rationale described Designed to identify areas for improvement</td>
<td></td>
</tr>
<tr>
<td>Targets</td>
<td>None</td>
<td>Not quantifiable or Does not reflect improvement or Does not reflect maintenance of achieved objective</td>
<td>Is quantifiable and Reflects program improvement or Reflects maintenance of achieved objective</td>
<td>Reflects significant change/program improvement</td>
<td></td>
</tr>
<tr>
<td>Findings</td>
<td>None</td>
<td>Not aligned with measure Finding status not indicated Description (results) missing</td>
<td>Findings entered for each measure and Status of finding indicated and clearly described and Appropriate evidence is presented</td>
<td>Multiple periods of data are available Trends or patterns over time are discussed Dissemination of results to appropriate stakeholders has been completed</td>
<td></td>
</tr>
<tr>
<td>Actions Plans/Use of Results</td>
<td>None</td>
<td>Does not align with objective Does not describe intended improvements</td>
<td>Action plan is developed from findings and aligned with objective and Clearly describes intended improvements</td>
<td>Responsibilities for actions are assigned Target implementation date for action(s) is stated Changes are described and are linked to assessment data, or if no changes are reported, an explanation is provided</td>
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</table>
Mercyhurst Administrative and Co-Curricular Assessment: Action Plan Follow-Up

<table>
<thead>
<tr>
<th>1) Unit</th>
<th>2) Date</th>
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<table>
<thead>
<tr>
<th>3) Measurable Objective</th>
<th>4) Brief Description of Action Plan</th>
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<thead>
<tr>
<th>5) Responsible Person/Group</th>
<th>6) What is the Status of the Action Plan?</th>
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<tbody>
<tr>
<td></td>
<td>____Not started  ____Ongoing  ____Finished  ____Terminated</td>
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<tr>
<th>7) Were non-Budgetary Resources Allocated?</th>
</tr>
</thead>
<tbody>
<tr>
<td>____No  ____Yes  (If yes, explain)</td>
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</table>

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<thead>
<tr>
<th>8) Were Budgetary Resources Allocated</th>
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</thead>
<tbody>
<tr>
<td>____No  ____Yes  If yes indicate Budget Amt. received: ____________</td>
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</table>

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<tr>
<th>9) Explain how the actions have been carried out, the associated budgetary and non-budgetary resources, as well as the implications of the Action Plan, as tied back to the measurement of the objective.</th>
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A. GLOSSARY OF TERMS (From Concordia College)

**Achievement test** (both academic and institutional)
A test that measures how well a student has reached the objectives of a specific course or program.

**Alternative assessment**
Non-traditional forms of assessment; may include portfolios, observations, work samples, or group projects.

**Assessment**
Any systematic method of obtaining information from tests and other sources, used to draw inferences about characteristics of people, objects, or programs; the process of gathering, describing, or quantifying information about performance; an exercise such as a written test, portfolio, or experiment that seeks to measure a student's skills or knowledge in a subject area.

**Assessment, Direct**
Involves looking at student performance by examining samples of student work. This assessment may examine student outcomes from a given course, from a degree program or from the overall University (as in achieving University core curriculum goals). Examples of the work to be assessed are: targeted objectives exhibited on final exams questions; student papers or presentations assessed for achievement of course or program goals; student portfolios assessed for achievement of course, program, or University goals; or licensure exams for professional programs.

**Assessment, Indirect**
Gathering information about student learning by looking at indicators of learning other than student work output. This assessment approach is intended to find out about the quality of the learning process by getting feedback from the student or other persons who may provide relevant information. It may use surveys of employers, exit interviews of graduates, focus groups, or any number of classroom assessment techniques (e.g. minute papers, muddiest point papers or one sentence summaries.)

**Assessment, Institutional**
A measure of the institution’s overall effectiveness in achieving its educational mission.

**Assessment Program**
A process for measuring and improving the effectiveness of meeting student learning goals established for majors of an academic program.
**Benchmark**
A standard by which something can be measured or judged.

**Content validity**
How well the content of a test reflects the construct that the test is measuring.

**Criterion referenced assessment**
An assessment where an individual's performance is compared to a specific learning objective or performance standard and not to the performance of other students. Criterion referenced assessment tells us how well students are performing on specific goals or standards rather than just telling how their performance compares to a norm group of students nationally or locally. In criterion-referenced assessments, it is possible that none, or all, of the examinees will reach a particular goal or performance standard.

**Culture of evidence**
A campus-wide belief and behavior in which assessment findings are consistently and routinely used to improve student learning and make decisions.

**Data-based**
Using data (i.e., evidence) as opposed to intuition or belief when making a decision.

**Diagnostic test**
Test that identifies a student’s strengths and weaknesses.

**Evaluation**
Making decision(s) based on the results of assessment.

**Face Validity**
The degree to which a test looks right and appears to measure the knowledge or abilities it claims to measure, based on the subjective judgment of the examinees who take it, the administrative personnel who decide on its use, and other psychometrically unsophisticated observers.

**Feedback loop**
The continuous cycle of collecting assessment results, evaluating them, using the evaluations to identify actions that will improve student learning, implementing those actions, and then cycling back to collecting assessment results, etc.

**Formative assessment**
An assessment used during the course of instruction to provide feedback to the teacher and learner about the learner’s progress toward desired educational outcomes; the results of formative assessments are often used in planning subsequent instruction.

**High -stakes testing**
Standardized tests that have become the only criterion for inclusion or exclusion.
Holistic scoring
Method of rating an assessment based on general descriptions of performance at specified levels; while a holistic scoring rubric may take into account performance along several dimensions (e.g., fluency, grammatical accuracy, and word choice for oral language), one overall score which best represents the examinee’s performance is assigned.

Norm - referenced tests
An objective test that is standardized on a group of individuals whose performance is evaluated in relation to the performance of others; contrasted with criterion-referenced tests. Most standardized achievement tests are referred to as norm-referenced.

Outcome
A measurable variable or attribute that is considered an indicator of achievement or of progress toward its related goal. (May also be referred to as “learning outcome,” “student learning outcome,” or “educational outcome.” Outcome and objective are often used interchangeably.)

Outcome data
Data obtained by using the outcome measurement tools to assess student learning, as defined in the program assessment profile.

Performance based assessment
Performance assessment is a form of testing that requires students to perform a task rather than select an answer from a ready-made list. Performance assessment is an activity that requires students to construct a response, create a product, or perform a demonstration. Usually there are multiple ways that an examinee can approach a performance assessment and more than one correct answer.

Placement test
A test that has the purpose of placing a student into a particular level or section of a language curriculum or school.

Proficiency test
A proficiency test is not limited to any one course, curriculum, or single skill; rather it tests overall ability.

Rubric
A set of specific criteria used to assess student work or performance. A rubric often improves the consistency and accuracy of subjective assessments.

Scale score
Score that allows test results to be compared across students; in standardized testing, raw scores are often converted to scale scores.
**Standardized test**
A test that presupposes certain standard objectives, or criteria, that are held constant across one form of the test to another.

**Student learning**
The knowledge and skills that a student is expected to acquire.

**Summative assessment**
Assessment that aims to measure, or summarize, what a student has grasped, and typically occurs at the end of a course or unit of instruction.

**Triangulation**
A process of combining methodologies to strengthen the reliability of a design approach; when applied to alternative assessment, triangulation refers to the collection and comparison of data or information from three different sources or perspectives.

**Validity**
The extent to which inferences made from assessment results are appropriate, meaningful, and useful in terms of the purpose of the assessment.

**Value-Added Assessment**
A measure of the growth in a student’s knowledge and skills over time. A value-added assessment requires at least two measures of the same learning outcome at different points in time, usually at the beginning of the course or program and just prior to completion.
One way to visualize the assessment plan is in terms of a hierarchy. Here is an explanation of each part of the plan that is needed for a thorough assessment process.

The Mission Statement is what guides your department/area. It is the highest-level description of what you do.

Goals are the big-picture things that you want to do. They are usually the same for many assessment cycles.

Objectives are the ways that you’re going to work toward meeting your goal. Think of them as the steps that you take toward realizing that big-picture. Remember: Objectives Must Be Measurable!

Measures are the tools that you’ll use to collect data. They can be quantitative (surveys, financial reports, etc.) or qualitative (exit interviews, comment cards, etc.), or any combination that does the job you need it to. It is possible to use a single tool for more than one objective.

Every objective must have a target. This is the result that you are aiming for when you apply the measure. Think of this as the thing that will determine whether your objective puts you on the right track to keep making progress toward your goal.

If you measured this objective during this cycle, you will have a finding. The finding is simply a brief statement that explains what result you obtained when you measured. If you did not measure it this assessment cycle, you do not need a finding.

If your finding fell short of your target, you need an action plan. This is basically where you tell us what you’re going to do in the future to help meet your target. If you did not measure this cycle or if you met your target, you do not need an action plan.
Here is an example of a completed hierarchy from an administrative unit, the Office of Academic Affairs. As you can see, it is possible (and often necessary) to have more than one objective for each goal, and sometimes you can have more than one measure for each objective.
Here is an example of a hierarchy from an co-curricular unit, Campus Ministries. As you can see, it is possible (and often necessary) to have more than one objective for each goal, and sometimes you can have more than one measure per objective.
References

*Academic planning and development.* (n.d.). San Francisco State University, San Francisco, CA. Retrieved from https://sites.sfsu.edu/air/assessment GeorgiaStateUniversityAssessment

Rubric


*External review of academic programs.* (n.d.). Furman University, Greenville, SC. Retrieved from http://www.2.furman.edu/academics/deptchairs/FacultySupervision/Pages/ExternalReviewofAcademicPrograms.aspx


