



Office of Institutional  
Assessment

# SUPPORT SERVICES ASSESSMENT HANDBOOK

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## Assessment Overview

### What is assessment?

Assessment is a process for gathering, organizing, and analyzing data related to a unit's performance against its stated goals/outcomes. At WCU, assessment focuses on **continuous improvement**, which means that your unit may reach its goals right away, but it may also reach them incrementally, over a period of years.

To keep track of its continuous improvement, each support unit at the university will collect data relating to its performance and will then report that data annually in the form of a **Continuous Improvement Report (CIR)**. All CIRs are submitted to the **Office for Institutional Assessment** through the **Xitracs** software program. Both **academic and student support service units**, as well as **educational/academic programs**, submit CIRs.

### How can assessment benefit my unit?

Collecting and reporting on continuous improvement data helps your unit keep track of its performance against the unit's stated goals. In turn, this data can help your office:

- Contribute to stakeholder learning, growth, and development
- Increase staff accountability
- Inform best practices
- Seek and prioritize resources
- Ensure institutional quality
- Convince others of the need and effectiveness of organizational initiatives
- Influence policy development
- Connect to the university's strategic planning process
- Support accreditation

Ultimately, your unit can utilize its assessment data to strengthen its effective practices, to find areas of necessary improvement, and to help guide decisions regarding future actions.

### What terms do I need to know to successfully navigate the assessment process?

- **Continuous Improvement** - the process of incremental improvement that occurs when institutions commit to assessing their programs and services
- **Continuous Improvement Report (CIR)**- an annual report submitted by each unit that details progress on performance goals
- **Measurement** - the method utilized to assess an outcome. *For example*, this might be internal data collected by your unit, external data collected by the Office of Institutional Planning and Effectiveness (OIPE), survey data, etc.
- **Operational outcomes (or program outcomes)** - outcomes that assess your unit's quality of service including its efficiency (completed and timely processes) and its effectiveness (your unit's impact on students and other stakeholders)
- **Outcomes:** a term often used interchangeably with goals or objectives.
- **Program** - a term often used interchangeably with unit or department
- **Strategic Plan** - the plan created and used by an organization to promote its core principles and values  
See [WCU's current strategic plan](#).
- **Xitracs** - the software system used to submit CIRs here at WCU

## Assessment Process

### What is an assessment plan, and how do I create one?

An assessment plan details *the outcomes* your unit wants to achieve and then explains *how* those outcomes will be measured and *when* they will be measured. The Office of Institutional Assessment suggests creating **five or six total outcomes** for your unit, but please keep in mind that you will not need to assess each of those outcomes every year.

Instead, you should create an assessment plan for a five-year cycle and each outcome **should be assessed at least twice within those five years**.

Here is a [template](#) to help you get started on your assessment plan.

Your assessment plan should organize outcomes in a way that is meaningful to your unit. For example, your unit may facilitate a mentoring program every two years; therefore, you would assess that program only in the years it occurred.

Once you have decided on the timeline for assessing each outcome, you will need to select the measure you intend to use for measurement of that outcome. Detailed information on types of measurement appears later in this document.

Your completed assessment plan should include similar information to the example below, including **1) your unit's outcomes, 2) the types of measurement that will accompany each outcome, and 3) a timeline for assessment**.

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#### **For example:** Potential Five-Year Assessment Plan

Years 1, 3, and 5	Measurement Type
Our unit will increase program enrollment by 5% annually.	<b>Internal Data –</b> Unit keeps track of enrollment each semester.
Our unit will expand the diversity of student groups served by our programs.	<b>External Data –</b> Unit utilizes demographic data from the Office of Institutional and Planning Effectiveness
Our unit's student employees will identify at least two transferable skills meaningful to their future employment.	<b>Survey –</b> Unit will conduct an annual survey of its student employees
Years 2 and 4	Measurement Type
Our unit will employ multiple methods of communication to reach potential student participants in our programs.	<b>Internal Data –</b> Unit will keep records on the various types of student outreach communication utilized.
Our unit will actively seek to build partnerships and collaborative programs with other WCU units.	<b>Internal Data –</b> Unit will keep records on outreach to other units and details of collaborative program creation.
Our unit will achieve an 80% annual satisfaction rate from students who utilize our services.	<b>Survey –</b> Unit will ask students to complete a satisfaction survey after utilizing the services of our unit.

## What is the process for identifying appropriate unit outcomes?

**First**, keep in mind that your unit's outcomes should align with the wider institutional mission, goals, and initiatives, as articulated in WCU's [current strategic plan](#).

**For example**, consider the mission statement of WCU's Office of Institutional Assessment below.

The Office of Institutional Assessment (OIA) supports Western Carolina University's dedication to academic and operational excellence by promoting evidence-based 'best practices' in the assessment of student learning, educational programs, and academic support units. Our office strives to facilitate a culture of participatory assessment on campus through 1) maintaining clear and consistent communication with faculty, staff, and administrative stakeholders, 2) helping programs contextualize and interpret data, and 3) providing timely and detailed continuous improvement feedback.

**Now consider one of OIA's operational outcomes:**

**Outcome:** The Office of Institutional Assessment will maintain a practice of regular program reviews for academic programs and support units.

**This particular outcome aligns** with WCU's Strategic plan, **specifically Goal 6.3.2**, which reads:

Ensure delivery of excellent service experiences through ongoing assessment and periodic administrative reviews where possible.

**Next**, remember that your unit's outcomes should focus on actions that contribute to the unit's mission. When creating your outcomes, **ask yourself**: What does our program/unit want to achieve? Which actions can help us become even more effective members of the university community? Which actions would help to demonstrate the success of our unit?

Outcomes are critical to assessing continuous improvement. They provide direction for staff members and encourage consistency in a unit's strategic plan and direction. And outcomes are not static – they can be changed over time to allow for adjustments in a unit's goals.

Support units generally utilize two types of outcomes: **operational outcomes** and **student learning outcomes**, and these terms are defined below.

### **Operational Outcomes**

Operational outcomes focus on operational effectiveness, efficiency, and quality of service. They examine what a program is to do, achieve, or accomplish for its own improvement or in support of institutional or divisional goals. **This will be the most common type of outcome used within support units.**

Below, we've included two examples of operational outcomes from our office (OIA). In general, operational outcomes tend to focus on increasing or decreasing a particular numeric metric, and/or satisfaction rates with particular services.

- The Office of Institutional Assessment will increase the on-time response rate for support services units' continuous improvement reports.
- The Office of Institutional Assessment will increase alignment between external accreditation and internal continuous improvement reporting.

### Student Learning Outcomes (SLOs)

SLOs focus on the knowledge and/or skills that students take with them from a learning experience. SLOs are typically used when assessing academic/educational programs; however, **support units that provide direct instruction or co-curricular activities for students may also use SLOs to assess their efforts.**

The following are examples of student learning outcomes:

- LEAD students will be able to demonstrate effective communication skills after participating in the Leadership Program.
- Students will identify five behaviors and/or characteristics of healthy relationships with others after attending this seminar.
- Faculty who attend the PD workshop will be able to state three ways their work contributes to first-year student retention.

### How do I measure outcomes?

There are two types of assessment data: **quantitative** and **qualitative**. Both quantitative and qualitative data are valuable to the continuous improvement process. Though they share similarities and are complementary to each other, there are conceptual differences between the two methods, and each method is described in more detail below.

	Quantitative	Qualitative
<b>Data Type</b>	Numbers	Text
<b>Data Collection</b>	Yields numerical data from counts, surveys, spreadsheets, etc.	Yields words or statements, often from case studies or descriptions of practices within the office
<b>Analysis</b>	Uses diagrams, tables, graphs, and/or statistical analysis	Uses an assessor's professional judgement
<b>Generalization</b>	Applicable to greater populations with larger samples	Presents more depth and robustness
<b>Examples</b>	<ul style="list-style-type: none"> <li>○ Institutional data (for instance, demographic data)</li> <li>○ External Survey Data</li> <li>○ Internal Survey Data</li> <li>○ Test and Rubric-Based Assessment Data (<i>for student learning or co-curricular outcomes</i>)</li> </ul>	<ul style="list-style-type: none"> <li>○ Interview</li> <li>○ Focus Groups</li> <li>○ Document Review</li> <li>○ Portfolio</li> <li>○ Descriptive Rubrics</li> <li>○ Observations/Field Notes</li> </ul>

Table 1: Adapted from UNC Charlotte Student Affairs Research and Assessment. (2022). *Assessment Toolkit: Data Collection Methods*; Keeling, R.P, Wall, A.F., Underhile, R., & Dungy, G.J. (2008). *Assessment reconsidered: Institutional effectiveness for student success*. Washington, D.C.: Student Affairs Administrators in Higher Education.

As you collect data, it is important to consider the various levels at which that can occur—for instance, you can collect data at the university/institutional or at the program level. If you are using institutional data to measure an outcome, that external data will likely come from the Office of Institutional Planning and Effectiveness (OIPE) or another administrative office on campus.

**Most often, though, you will collect your own data at the program level (internal data).** Your unit may create surveys for your stakeholders on campus, you may keep track of attendance at your events, or you may keep a count of how many individuals utilized your services within a given period. These are just a few examples of the ways in which data may be collected for assessment.

## How do I analyze the data?

The first step is to compile and organize your data. You may want to create a table or graph to see the patterns more easily. Once the data is organized, do any clear patterns emerge? And what does the data tell you about your unit's performance against its outcomes?

You should also keep in mind the comparisons you may make during data analysis. The various comparisons include:

- A group of students at a common point in time
- Tracking and comparing cohorts of students
- A group of students at a particular point in time to answer a relatively focused question
- Collecting data before an event (through a survey, perhaps) and then asking the same questions after an event

### Disaggregating Data

As you assess your unit's outcomes, please try to disaggregate your data when possible – meaning please break down the data into smaller informational categories, such as age, geographic area, specific survey response, and/or other variables. A disaggregated, analysis of a particular service or intervention can really help to support the assessment process because it points out very specific areas of strength and/or necessary improvement.

**For example:** The Office of Institutional Assessment utilizes a survey to obtain data to support the following outcome: *The Office of Institutional Assessment will apply multiple communication methods for assessment matters with campus stakeholders.*

The table below disaggregates the survey responses into discrete categories:

The CIR work sessions...	Strongly Agree	Agree	Disagree	Strongly Disagree
Were helpful for me.	66.67%	33.33%	0.00%	0.00%
Provided information that helped me complete my CIR.	74.29%	25.38%	0.33%	0.00%
Helped me form a connection with the Office of Institutional Assessment.	88.33%	11.67%	0.00%	0.00%



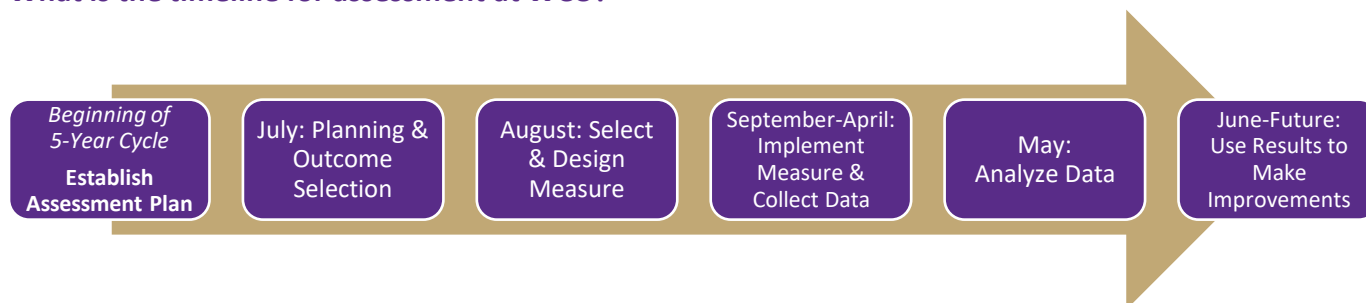
## Continuous Improvement

### I've analyzed the data – what's next?

Now you need to use your data analysis results to inform and implement improvement actions within your unit – this is perhaps the most critical step in the continuous improvement process. Based on the story told by your data, what improvements might you make to further strengthen the unit's effectiveness and move the unit closer to meeting its stated outcomes? **Decide on those actions and create a strategy for implementing them in the coming year.**

And keep in mind that some of the improvements you suggest may be minor and easy to implement, but others may require more substantial changes and take years to achieve their desired results. Both are expected and acceptable to report as a part of the assessment process.

### What is the timeline for assessment at WCU?



### What information do I need to include in my CIR?

First, you will share what improvements have been implemented for each outcome as a result of your last CIR assessment. Next, you'll include a description of your assessment measure for the current cycle (i.e., internal data review, survey, etc.), along with specific details on how it was implemented. Then you'll detail your assessment results, including whether the target was met, how the data was analyzed, and a brief comparison to previous assessment results. Finally, you'll list your recommendations for continuous improvement based on the assessment results.

### What feedback will I receive, and what do I do when I receive it?

Once your CIR has been received by the Office of Institutional Assessment, we will review it over the next several weeks/months. When we review your CIR, we are looking to see if you answered each question thoroughly and provided substantial information about your assessment practices.

We use a CIR Checklist (a section of which is shown below) to provide continuous improvement feedback to all programs/units on campus. The most important aspects of continuous improvement are indicated by an asterisk, and you'll notice you are given a **Yes**, **No**, or **Partial** score for each outcome. In addition, you will receive formative feedback for each section of the CIR.

Feedback is organized by CIR section and by outcomes reported by the program for the academic year. The most important aspects of continuous improvement are indicated with an \*.

Responses to the feedback categories below are labeled **Yes (Y)**, **No (N)**, and **Partially (P)**.

	Outcomes			
	1	2	3	4
<b>I. Follow Up from Last CIR Assessment</b>				
*There is evidence of seeking and implementing improvements				
*Improvement actions directly relate to the outcome				



Description supports a clear understanding of what occurred to improve services/operations				
<b>Formative Feedback:</b>				
<b>II. Assessment &amp; Data Collection</b>				
*Assessment activities measure the outcome.				
What, How, Who, When, & Why of the assessment are clearly noted.				
*Brief description of how the assessment relates to different student populations, e.g., International, Residential, Off-campus, Commuter, Distance, Graduate.				
<b>Formative Feedback:</b>				
<b>III. Target, Results, &amp; Analysis</b>				
Targets (desired or expected results) are specific and reasonable				
*Results are clearly presented.				
*Analysis of results clearly indicates whether the outcome was met, partially met, or not met.				
*There is adequate detail of how (and by whom) the findings were analyzed				
Analysis of results includes comparisons with previous results, if applicable				
Analysis is detailed and facilitates planning for improvements in operations, student learning, and/or strategic direction				
<b>Formative Feedback:</b>				

## Resources and Contact Information

**Please don't hesitate to contact us with any questions – we are here to help you!**

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 Western Carolina University  
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**Additional Resources** can be found on our website: <https://www.wcu.edu/learn/office-of-the-provost/assessment-and-program-review/>

