

Administrative Effectiveness Evaluation (AEE)

2025-2026

Office of Institutional Accreditation & Effectiveness



WILLIAM & MARY

CHARTERED 1693

What You Need to Know

Purpose of Administrative Effectiveness Evaluation (AEE)

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

What You Need to Know

SACSCOC *Principles* Section 7: Institutional Planning & Effectiveness

“Effective institutions demonstrate a commitment to principles of **continuous improvement**, based on a **systematic and documented process** of assessing institutional performance with respect to mission **in all aspects** of the institution. An institutional planning and effectiveness process involves **all programs, services, and constituencies . . .**”

What You Need to Know

SACSCOC *Principles* Standard 7.3:

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

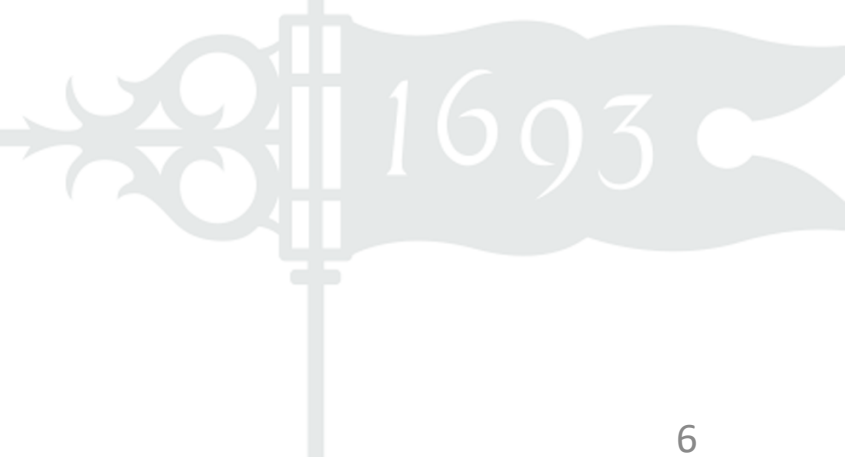
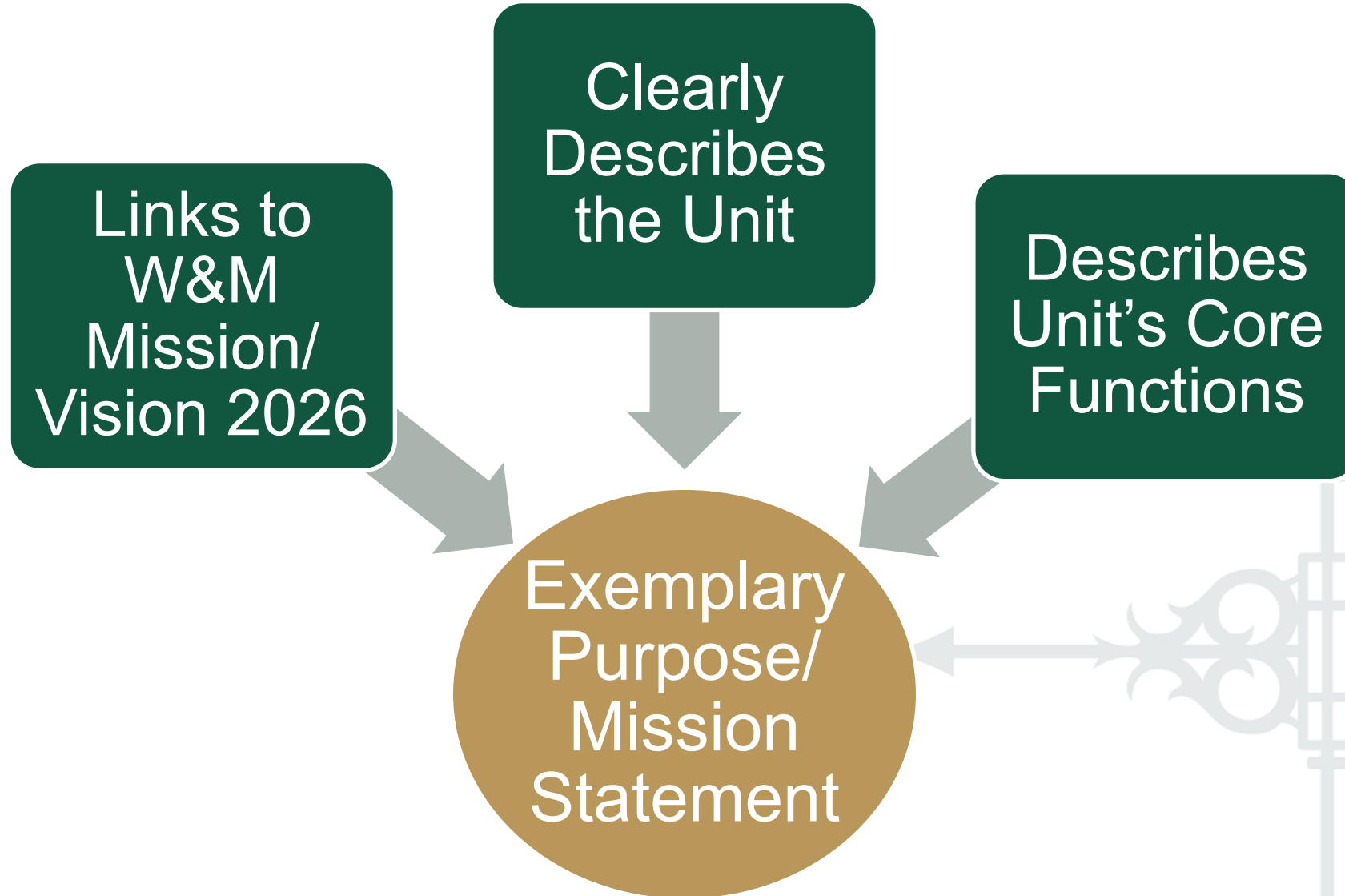
Note: No longer required to provide “evidence of seeking improvement” as with Section 8 standards.

What You Need to Know

AEE Plan, Results, & Achievement Reporting Components

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

Purpose/Mission Statement



Goal & Expectations

Goal: Efficient & Effective
Operations Leading to Stakeholder
Satisfaction

Expectation 1:
Efficient & Effective
Operations

FY 25

Expectation 2:
Quality of Service/
Stakeholder
Satisfaction

FY 26

Expectations

Expectation 1: Efficient & Effective Operations

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

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

Expectations

Expectation 2: Quality of Services/Stakeholder Satisfaction

Unit ensures high-quality service delivery & meets stakeholder expectations to achieve targets.

- Relates to the satisfaction of stakeholders with services, facilities, resources, technology, etc., the unit provides
- Often evaluated through surveys or focus groups to discover perceptions about the unit
- Units may sync operational evaluation with satisfaction evaluation = efficiency/effectiveness & satisfaction

Evaluation Plan

For Expectation 2, describe:

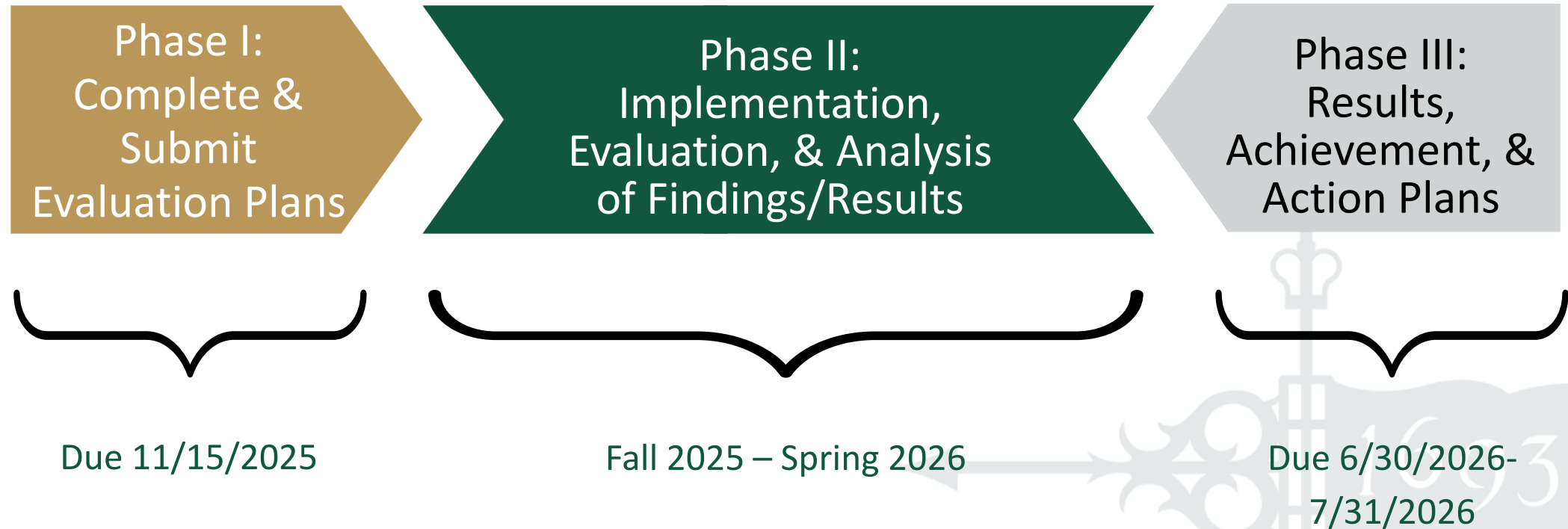
- Participants collecting, reviewing, & analyzing data
- Data Sources, Collection, & Review Process
 - Data
 - Methods
 - Schedule for review & reporting
- Achievement Target: intended results (qualitative/quantitative) of evaluation

Results, Target Achievement, Action Plan

For Expectation 2, describe:

- Summary & Analysis of Evaluation Results
- Achievement Target Status
 - Met
 - Partially Met
 - Not Met
- Action Plan (if Partially or Not Met): actions to meet target next evaluation cycle

AEE Timeline



QUESTIONS?



Instructions for Logging into & Navigating Anthology Planning Software



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GENERAL LOGISTICS



1

General Logistics

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



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W&M Central Authentication Service

WMuserid:

Password:

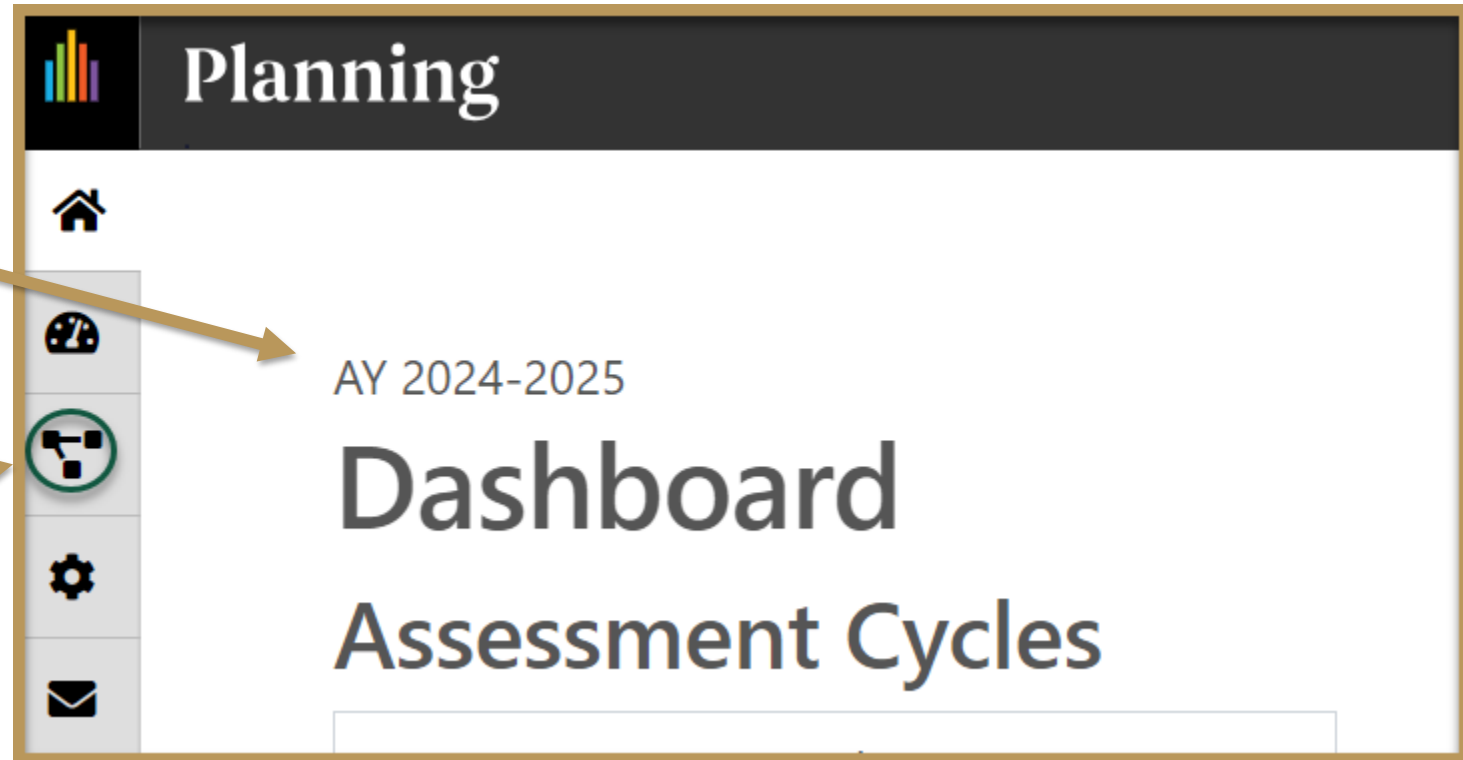
☐ I am at a public workstation.

LOGIN

2

General Logistics

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



3

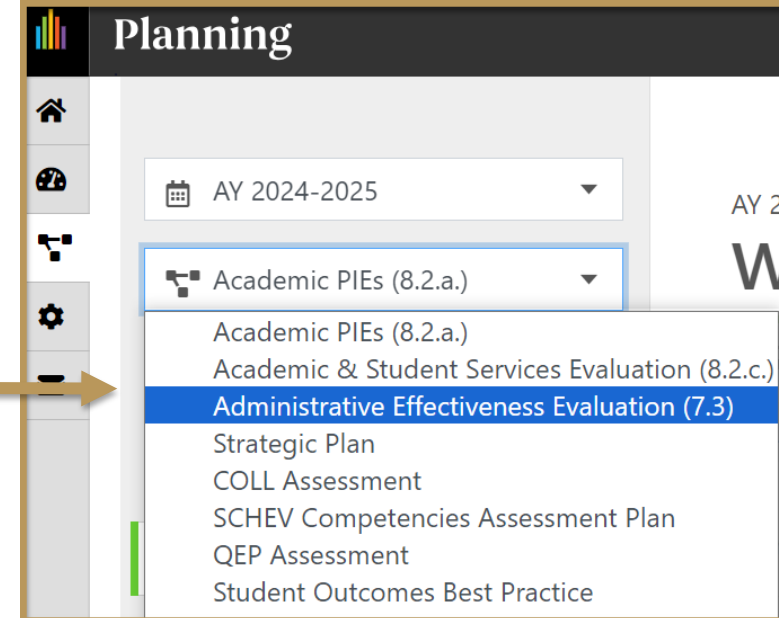
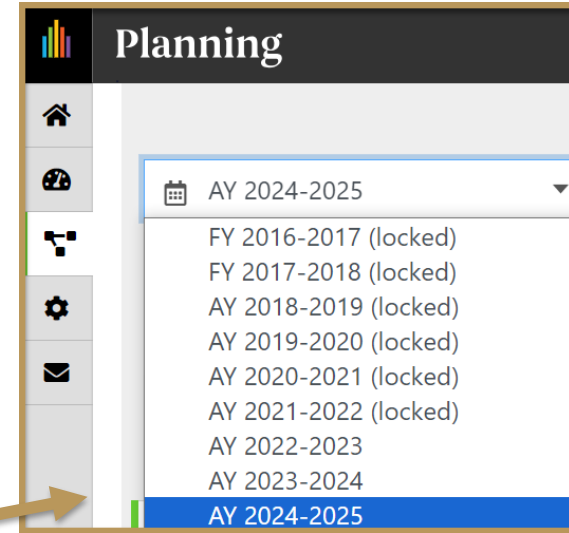
General Logistics

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

Planning is set to default to the current year.

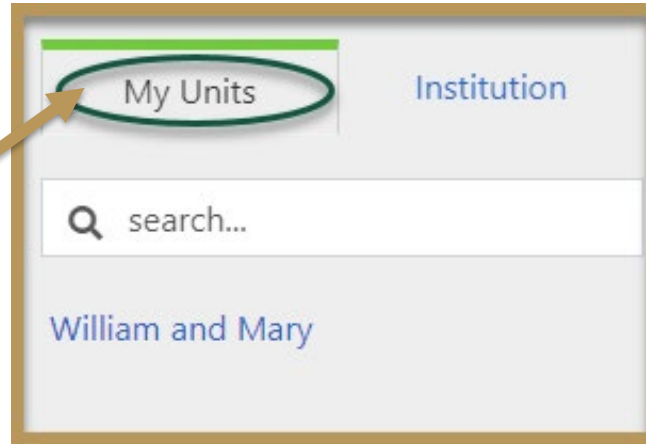
- Select **Administrative Effectiveness Evaluation (7.3)** inside the dropdown list.

It may be the only item on your list.

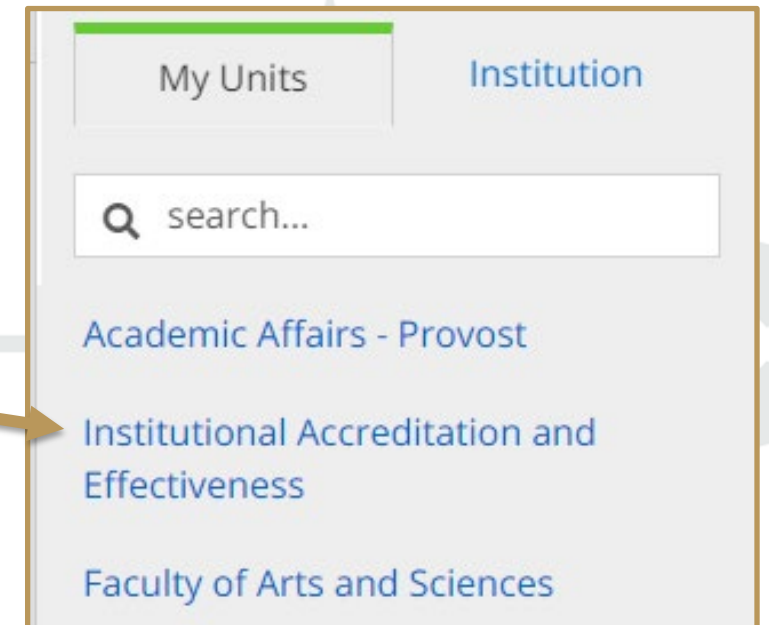


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General Logistics



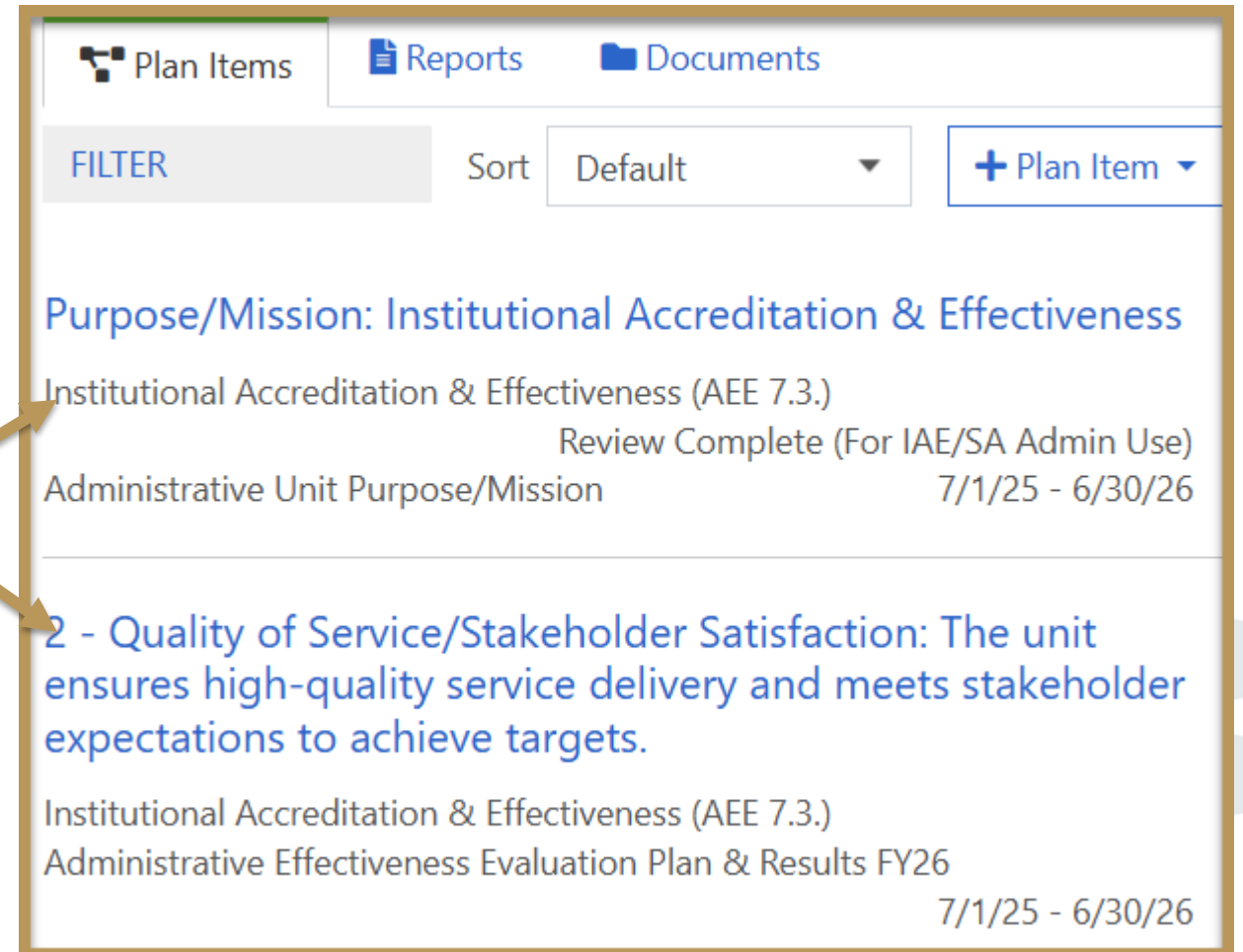
- Select the **My Units** Tab in the left-hand navigation menu.
- Select your unit/department from the left-hand navigation pane and then select your sub-unit, if applicable.
e.g., Institutional Accreditation and Effectiveness. The unit(s) to which you have permissions will display.



5

General Logistics

- Your Administrative Effectiveness Evaluation **Plan Items** display here.
- Click the item name to access and complete your unit's **Purpose/Mission Statement** or **AEE Expectation 2**.
Expectation 2 – Quality of Service/Stakeholder Satisfaction.



The screenshot shows a web interface with three tabs: 'Plan Items' (active), 'Reports', and 'Documents'. Below the tabs is a 'FILTER' button, a 'Sort' dropdown menu set to 'Default', and a '+ Plan Item' button. The main content area displays two items. The first item is titled 'Purpose/Mission: Institutional Accreditation & Effectiveness' in blue. Below it, in smaller text, is 'Institutional Accreditation & Effectiveness (AEE 7.3.)', 'Review Complete (For IAE/SA Admin Use)', and 'Administrative Unit Purpose/Mission' with a date range of '7/1/25 - 6/30/26'. The second item is titled '2 - Quality of Service/Stakeholder Satisfaction: The unit ensures high-quality service delivery and meets stakeholder expectations to achieve targets.' in blue. Below it, in smaller text, is 'Institutional Accreditation & Effectiveness (AEE 7.3.)', 'Administrative Effectiveness Evaluation Plan & Results FY26', and a date range of '7/1/25 - 6/30/26'. A large, light-brown arrow points from the text 'Expectation 2' in the list on the left to the second item in the screenshot.

Plan Items Reports Documents

FILTER Sort Default + Plan Item

Purpose/Mission: Institutional Accreditation & Effectiveness

Institutional Accreditation & Effectiveness (AEE 7.3.)
Review Complete (For IAE/SA Admin Use)
Administrative Unit Purpose/Mission 7/1/25 - 6/30/26

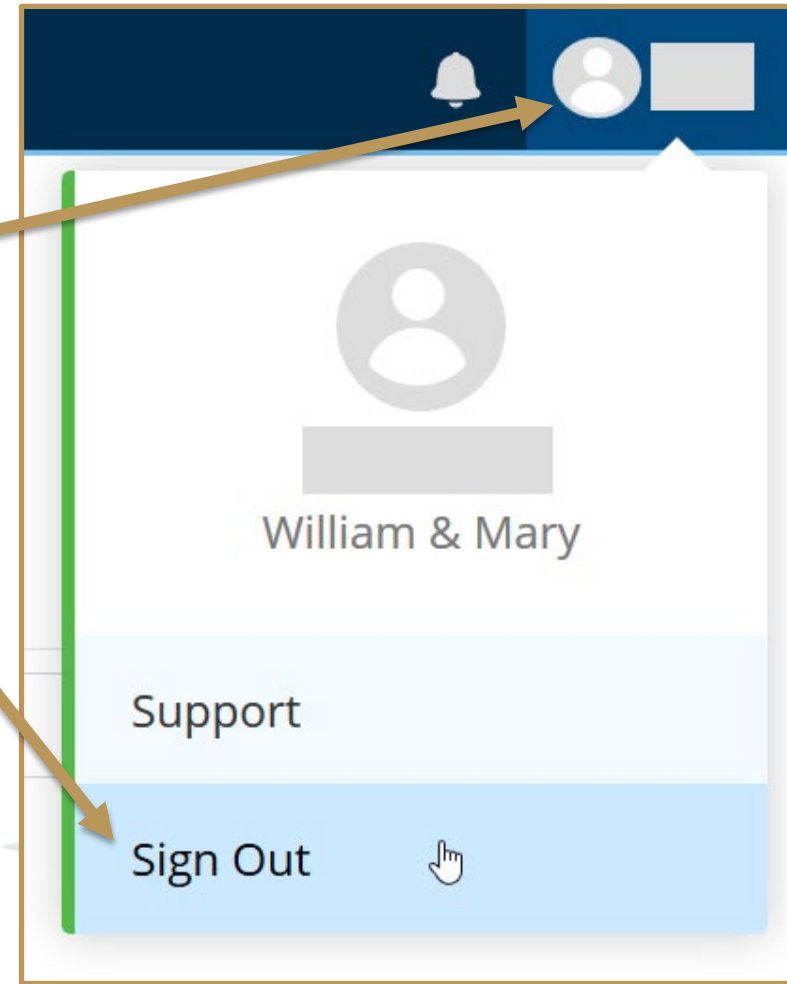
2 - Quality of Service/Stakeholder Satisfaction: The unit ensures high-quality service delivery and meets stakeholder expectations to achieve targets.

Institutional Accreditation & Effectiveness (AEE 7.3.)
Administrative Effectiveness Evaluation Plan & Results FY26
7/1/25 - 6/30/26

6

General Logistics

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



PURPOSE/MISSION STATEMENT



7

Complete Your Unit's Purpose/Mission

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

AY 2024-2025 / ADMINISTRATIVE EFFECTIVENESS EVALUATION (7.3)

Institutional Accreditation & Effectiveness (AEE 7.3.)

Plan Items Reports Documents

FILTER Sort Default + Plan Item

Purpose/Mission: Institutional Accreditation & Effectiveness

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

Unit Name Purpose/Mission *

Institutional Accreditation & Effectiveness Purpose/Mission

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

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

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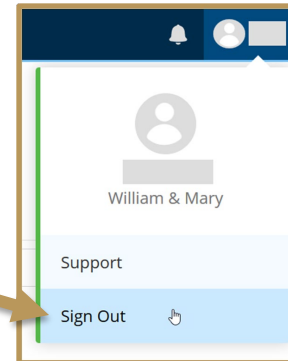
8

Complete Your Unit's Purpose/Mission

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

Delete

Done



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EXPECTATION EVALUATION PLAN



9

Complete Expectation Evaluation Plan

- Your unit will evaluate **Quality of Services/ Stakeholder Satisfaction** (Exp. 2).
- **Expectation Description:** Explain what it is you would like to evaluate and what you expect to gain from this evaluation. Please follow the prompts.
- **Participants:** Who will be included in this evaluation?

Expectation Name *

2 - Quality of Service/Stakeholder Satisfaction: The unit ensures high-

Expectation Description

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

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Paragraph ▾

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1) What exactly would you like to evaluate?

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

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

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

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Expectation Evaluation Plan

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

Participants

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

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Paragraph ▾

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10

Complete Expectation Evaluation Plan

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

Data Sources, Collection, & Review Process

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

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

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

3) When you will review the data/information and report the results (NOTE: Results are due during the Submission Window, **6/30/2026-7/30/2026**):

Expectation Achievement Target

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

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We will know we have met our target if:

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11

Complete Expectation Evaluation Plan

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

Evaluation Start Date *

07/01/2025

Evaluation End Date *

06/30/2026

Responsible Person(s)

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

Primary Responsible Person

Name

Primary Responsible Person

Title

Primary Responsible Person

Email

Additional Responsible Person

Name 1

Additional Responsible Person

Email 1

Additional Responsible Person

Name 2

Additional Responsible Person

Email 2

Additional Responsible Person

Name 3

Additional Responsible Person

Email 3

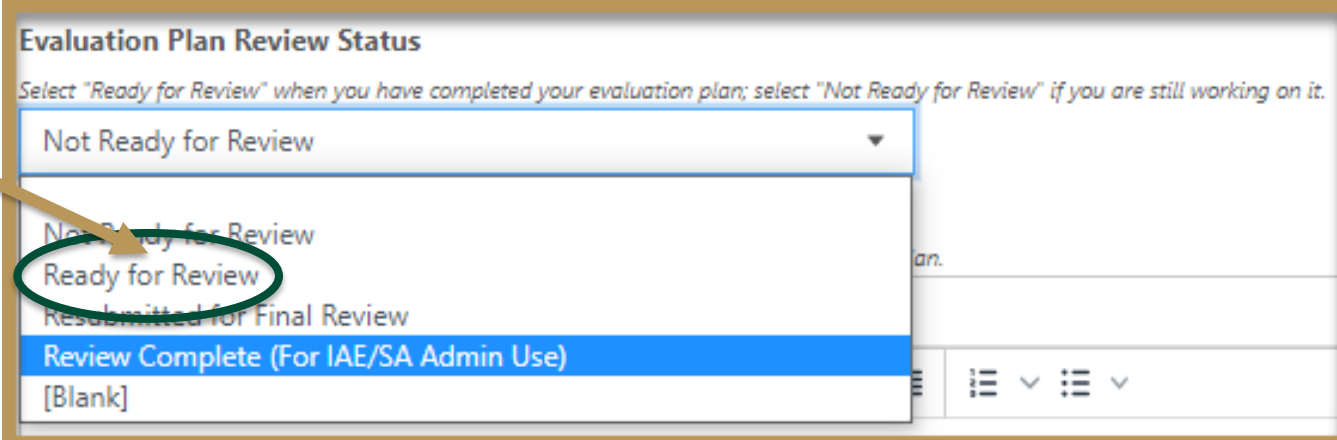
12

Complete Expectation Evaluation Plan

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

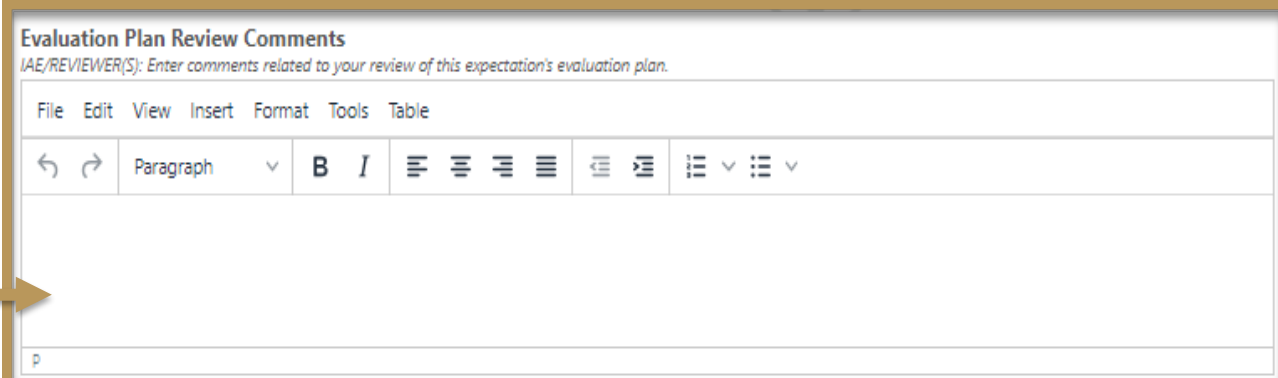
Due 11/15/2025.

- **IAE/REVIEWER(S)** will indicate approval (“Review Complete” in blue above) or that action is needed after review. **IAE/REVIEWER(S)** will also provide feedback on the evaluation plan here.



Evaluation Plan Review Status
Select “Ready for Review” when you have completed your evaluation plan; select “Not Ready for Review” if you are still working on it.

- Not Ready for Review
- Ready for Review
- Resubmitted for Final Review
- Review Complete (For IAE/SA Admin Use)
- [Blank]



Evaluation Plan Review Comments
IAE/REVIEWER(S): Enter comments related to your review of this expectation's evaluation plan.

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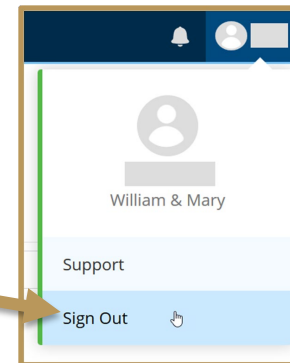
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*Note: Select **Resubmitted for Final Review** from the dropdown above if you are resubmitting the evaluation plan after making updates based on IAE/Reviewer(s) feedback.*

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Complete Expectation Evaluation Plan

- Click **Done** at the bottom of the page to return to your **Plan Items**.
- **Sign Out** of Planning and **close** your browser.



EVALUATION RESULTS & TARGET ACHIEVEMENT



14

Complete Evaluation Results & Target Achievement

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

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

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

Evaluation Results and Target Achievement

After you have collected & analyzed data, complete the fields below, then select "Submit" from the Evaluation Results Status dropdown list.

Complete the fields below, then select "Submit" from the Evaluation Results Status dropdown list.

Summary and Analysis of Evaluation Results

Summarize in this field the results of your evaluation for this expectation as outlined in your plan above. Include a description of what you evaluated. You may attach full results/reports below the text box.

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Plan Item Files

There are no attachments.

+ File + Folder

Achievement Target Status

Did you meet this expectation? Select "Met," "Partially Met," or "Not Met" from the dropdown list.

Met
Partially Met
Not Met

15

Complete Evaluation Results & Target Achievement

- **Action Plan *if Achievement Target is Partially or Not Met*:** Describe **actions** to make improvements or changes based on your analysis of results.
- **Evaluation Results Status:** Select “*Submit*” when done. *Due 6/01/2026.*
- Click **Done** at the bottom of the page to return to your **Plan Items**.
- **Sign Out** of Planning and **close** your browser.

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

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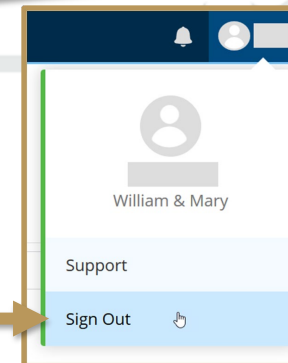
Paragraph B I

Evaluation Results Status

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

Submit
 ASC/IAE Reviewed

Done



Questions?

Contact
Us



Roger
(rmbryan@wm.edu, 1-6225)



Denise
(drridl@wm.edu, 1-2608)



Mav (mvreyes@wm.edu, 1-1648)