

# Academic & Student Services Evaluation (ASSE)

## Instructions for Logging into & Navigating Anthology Planning Software



WILLIAM & MARY

CHARTERED 1693

8/15/2023

# SACSCOC Principles Standard 8.2.c.:

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

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

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

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# GENERAL LOGISTICS





# General Instructions

- 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:

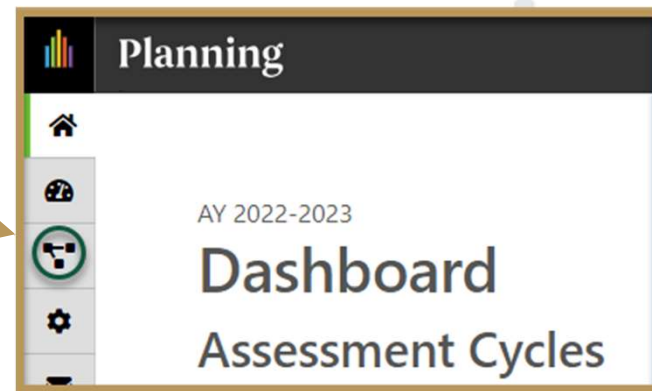
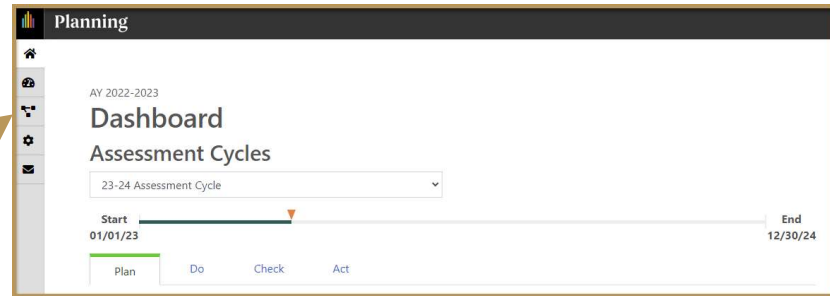
☐ I am at a public workstation.

LOGIN

# 2

## General Instructions

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



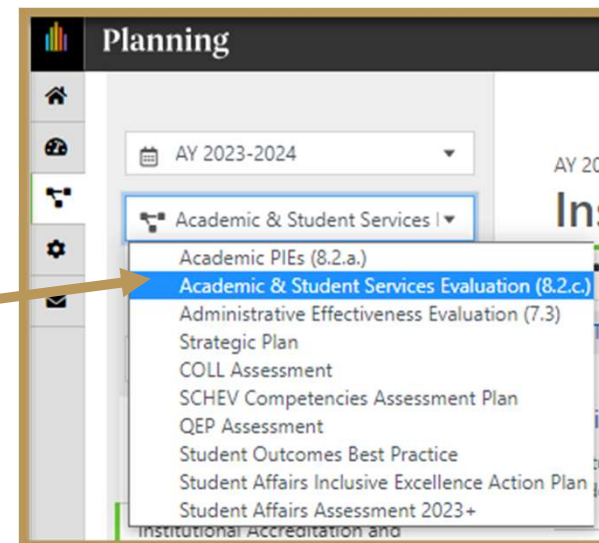
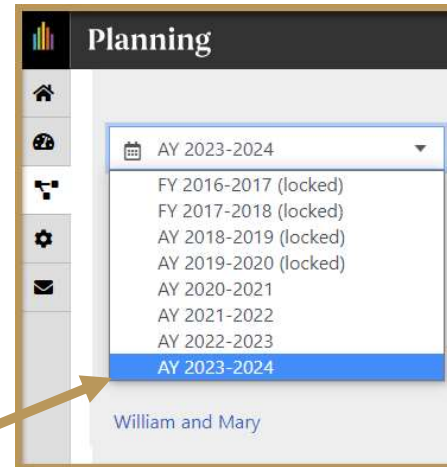
# 3

## General Logistics

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

Planning is set to default to the current year.

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

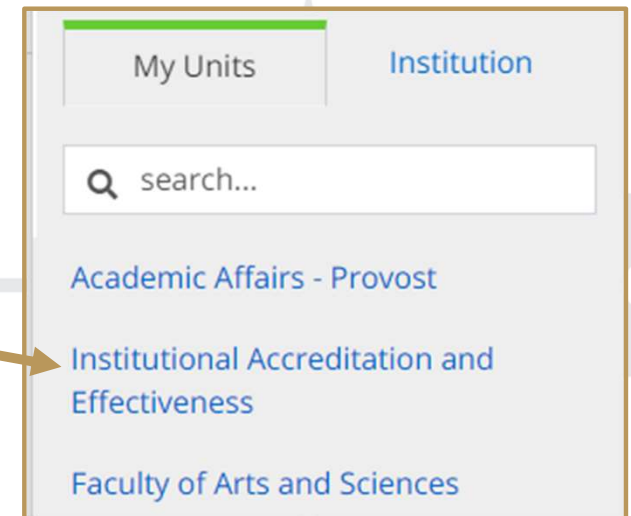


# 4

## General Logistics



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



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# 5

## General Logistics

- Your Academic & Student Services Evaluation **Plan Items** display here.
- Click the item name to access and complete your unit's **Purpose/ Mission Statement** and two **ASSE Expectations**.  
Expectation 1 – Efficient & Effective Operations and Expectation 2 – Quality of Academic & Student Services.

**Institutional Accreditation and Effectiveness**

Plan Items Reports Documents

FILTER Sort Default + Plan Item

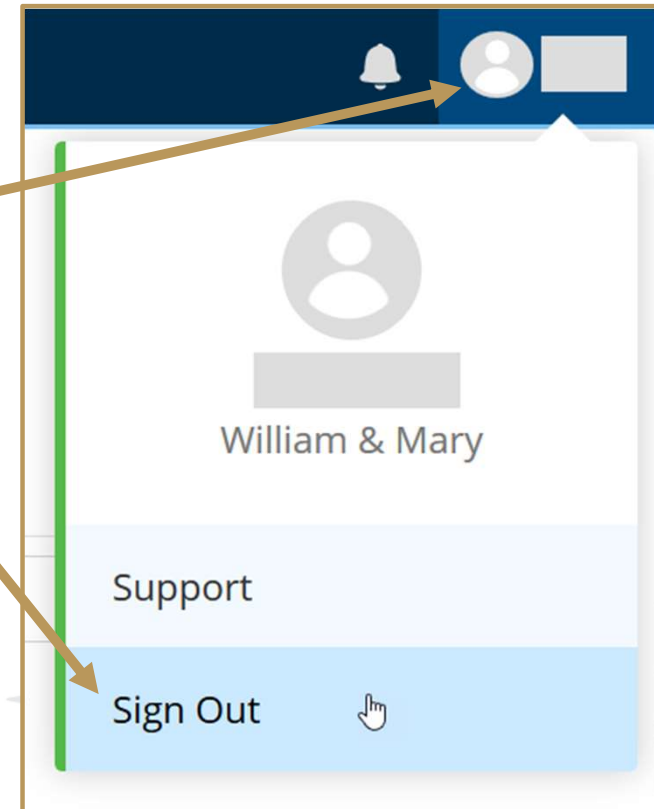
<a href="#">Institutional Accreditation &amp; Effectiveness Purpose/Mission</a>		
Institutional Accreditation and Effectiveness Academic & Student Services Unit Purpose/Mission		7/1/23 - 6/30/24
<a href="#">1 - Efficient &amp; Effective Operations: The unit establishes and maintains efficient and effective operations, optimizing processes and resources (budgetary, human, technological, physical) to achieve targets.</a>		
Institutional Accreditation and Effectiveness Academic & Student Services Evaluation Plan & Results		7/1/23 - 6/30/24
<a href="#">2 - Quality of Academic &amp; Student Services: The unit ensures high-quality service delivery to support student success.</a>		
Institutional Accreditation and Effectiveness Academic & Student Services Evaluation Plan & Results		7/1/23 - 6/30/24



# 6

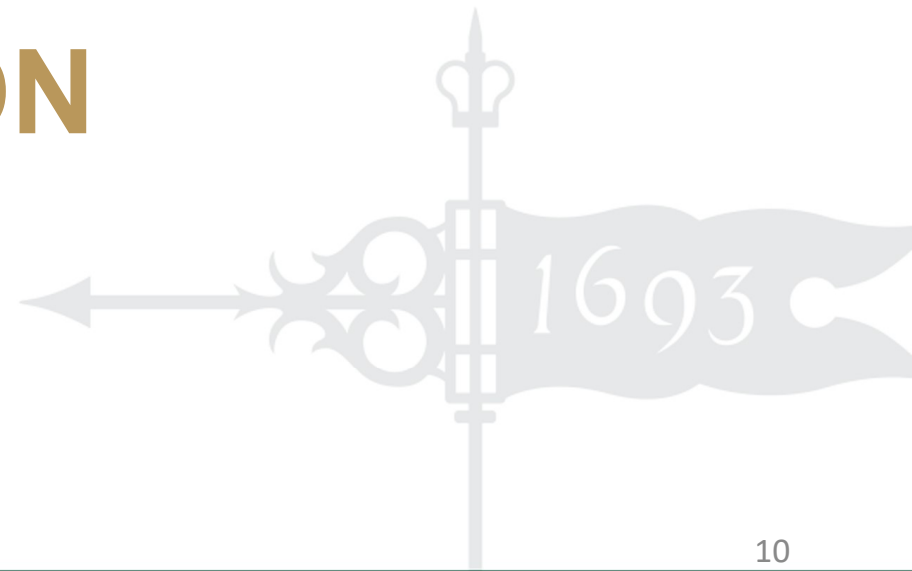
## General Logistics

- 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.



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# 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 2023-2024 / ACADEMIC & STUDENT SERVICES EVALUATION (8.2.C.)

### Institutional Accreditation and Effectiveness

Plan Items Reports Documents

FILTER

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

Institutional Accreditation and Effectiveness  
Academic & Student Services Unit Purpose/Mission

**Unit Name Purpose/Mission \***

Institutional Accreditation & Effectiveness Purpose/Mission

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

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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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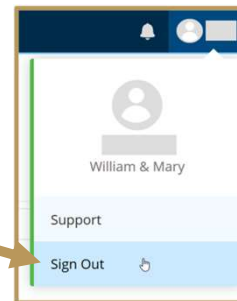
# 8

## 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 **Efficient & Effective Operations** (Exp. 1) and **Quality of Academic & Student Services** (Exp. 2).
- **Expectation Description:** Explain what it is you would like to gain from this evaluation. Please follow the prompts.
- **Participants:** Who will be included in this evaluation?

**Expectation Name \***

1 - Efficient & Effective Operations: The unit establishes and maintains efficient and effective operations, optimizing processes and resources.

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

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

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

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

**Expectation Evaluation Plan**

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

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

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# 10

## Complete Expectation Evaluation Plan

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

### Data Sources, Collection, & Review Process

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

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Paragraph B I

1) Data/information you will collect and from what sources:

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

3) When you will review the data/information and report the results:

### Expectation Achievement Target

*How will you know that you have met this expectation? Describe the intended qualitative and/or quantitative performance level/outcome of this evaluation.*

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# 11

## Complete Expectation Evaluation Plan

- **Approximate Start and End Date of the Evaluation:** You can leave the default date if you like.
- **Primary Responsible Person & Additional Responsible Person(s):** List the name and job title of the individual in charge of the evaluation. Add any additional person(s) here.

**Approximate Start Date of the Evaluation \***  
 \*\*You can leave the default 7/1/2023-6/30/2024 if you'd like or provide a more specific range within the academic year that the evaluation will occur.\*\*  
 07/01/2023

**Approximate End Date of the Evaluation \***  
 \*\*You can leave the default 7/1/2023-6/30/2024 if you'd like or provide a more specific range within the academic year that the evaluation will occur.\*\*  
 06/30/2024

**Primary Responsible Person**  
 Provide the name and job title of the main individual in charge of this evaluation.

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**Additional Responsible Person(s)**  
 Enter the name(s) and job title(s) of the individual(s) responsible for aspects of this evaluation process.

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 [Text Area]  
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# 12

## Complete Expectation Evaluation Plan

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

*Due 10/27/2023.*

**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]

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

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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.*

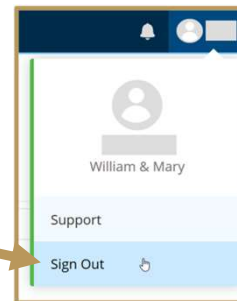
# 13

## Complete Expectation Evaluation Plan

- Click **Done** at the bottom of the page to return to your **Plan Items**.
- **Complete** the next **Expectation's Evaluation Plan** or **Sign Out** of Planning and **close** your browser.

Delete

Done



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# EVALUATION RESULTS & TARGET ACHIEVEMENT



# 14

## Complete Evaluation Results & Target Achievement

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

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

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

**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.

**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

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

### Interpretation & Use of Results

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

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### Action Plan \*if Achievement Target is Partially or Not Met\*

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

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↶ ↷ Paragraph B I

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

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

# 16

## Complete Evaluation Results & Target Achievement

- **Evaluation Results Status:** Select “*Submit*” when done.  
*Due 6/30/2024.*
- Click **Done** at the bottom of the page to return to your **Plan Items**.
- **Complete** the next **Evaluation Results** or **Sign Out** of Planning and **close** your browser.

**Evaluation Results Status**

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

Submit

ASC/IAE Reviewed

Delete

Done

William & Mary

Support

Sign Out

# Questions?

Contact  
Us



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Roger  
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Mav ([mvreyes@wm.edu](mailto:mvreyes@wm.edu), 1-1648)