

WILLIAM PATERSON UNIVERSITY

OFFICE OF INSTITUTIONAL EFFECTIVENESS

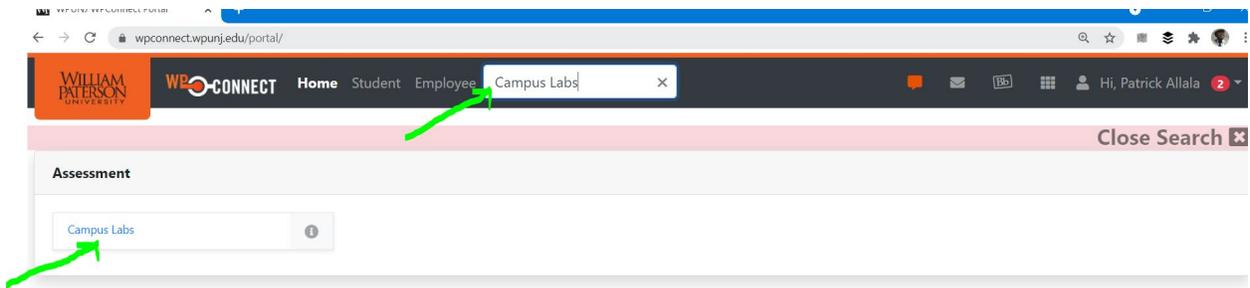


Step-By-Step Guide for Administrative Unit Assessment in Anthology Planning

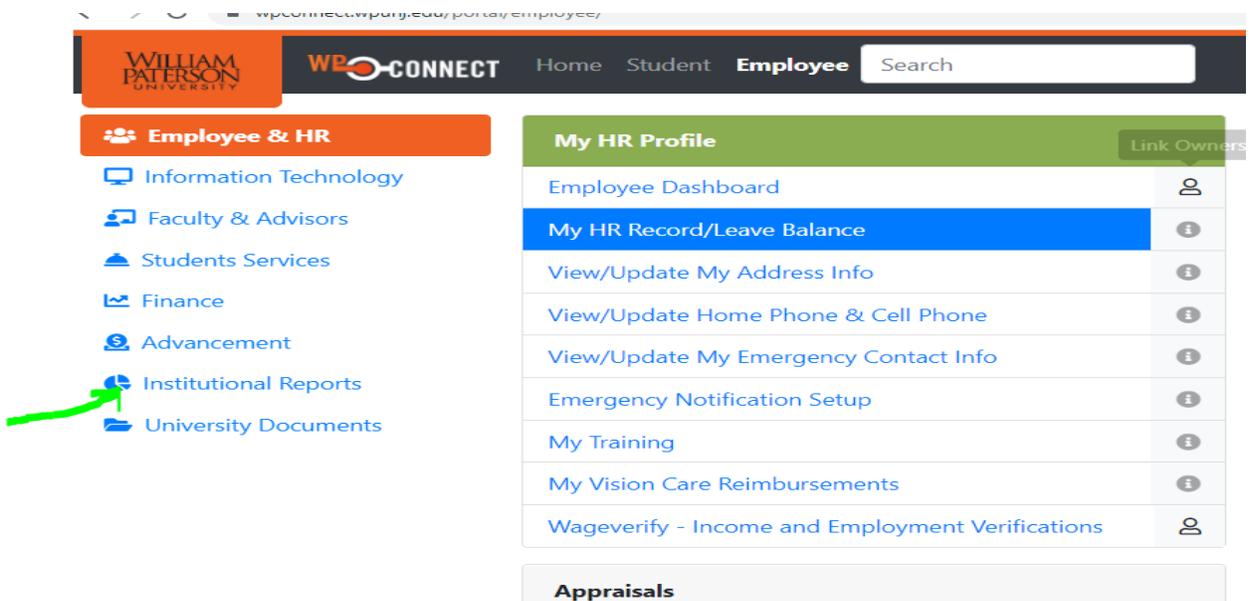
June 2021

By Dr. Patrick N. Allala

Log on to WP-Connect and do a search for “Campus Labs”. Select “Campus Labs” from the pop-up.



Or long on to WP-Connect and click on “Institutional Reports” and select “Campus Labs” as shown below.



Click on “Planning” as shown below

William Paterson University of New Jersey

Baseline

Assess student learning and success through surveys, rubrics, and benchmarking

Compliance Assist

Connect and manage your program review and accreditation efforts

Course Evaluations

Elevate teaching and learning with meaningful data

Engage

Promote meaningful engagement experiences across campus

Faculty

Manage course rosters, course evaluations, and more with a personalized dashboard

Outcomes

Assess academic and co-curricular alignment and performance

Planning

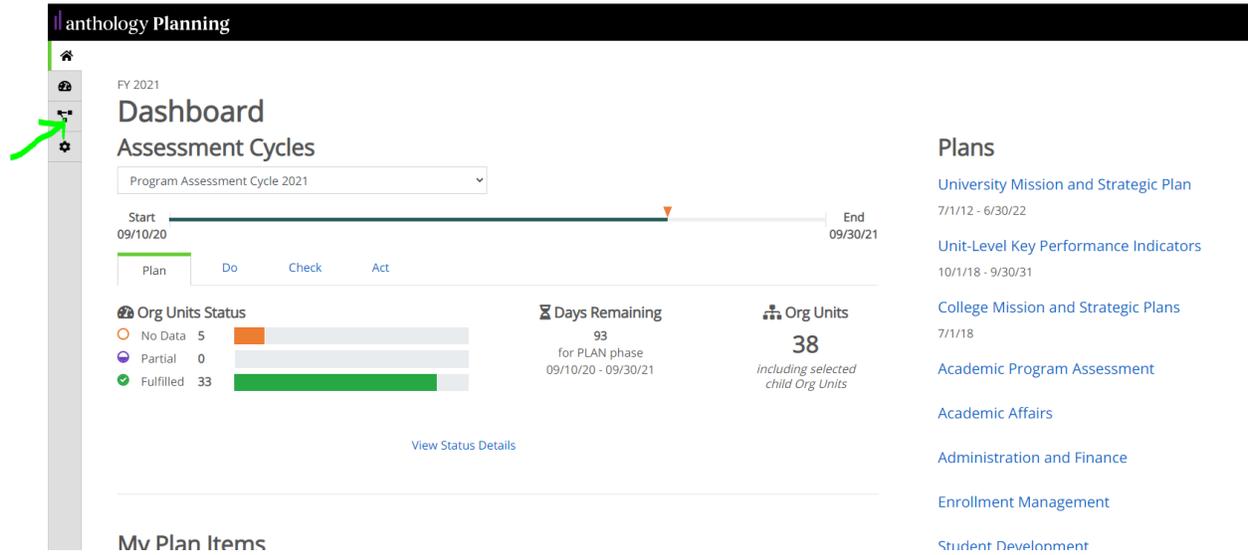
Connect and manage your strategic planning efforts

Rubrics

Conduct direct assessment using customized and best practice rubric templates

 **Need Help?** Visit our Support Center for articles, webinars, and other resources!

Then click on the “Plans” menu as indicated by the arrow below.



anthology Planning

FY 2021

Dashboard

Assessment Cycles

Program Assessment Cycle 2021

Start: 09/10/20 | End: 09/30/21

Plan | Do | Check | Act

Org Units Status	Count
No Data	5
Partial	0
Fulfilled	33

Days Remaining: 93 for PLAN phase (09/10/20 - 09/30/21)

Org Units: 38 (including selected child Org Units)

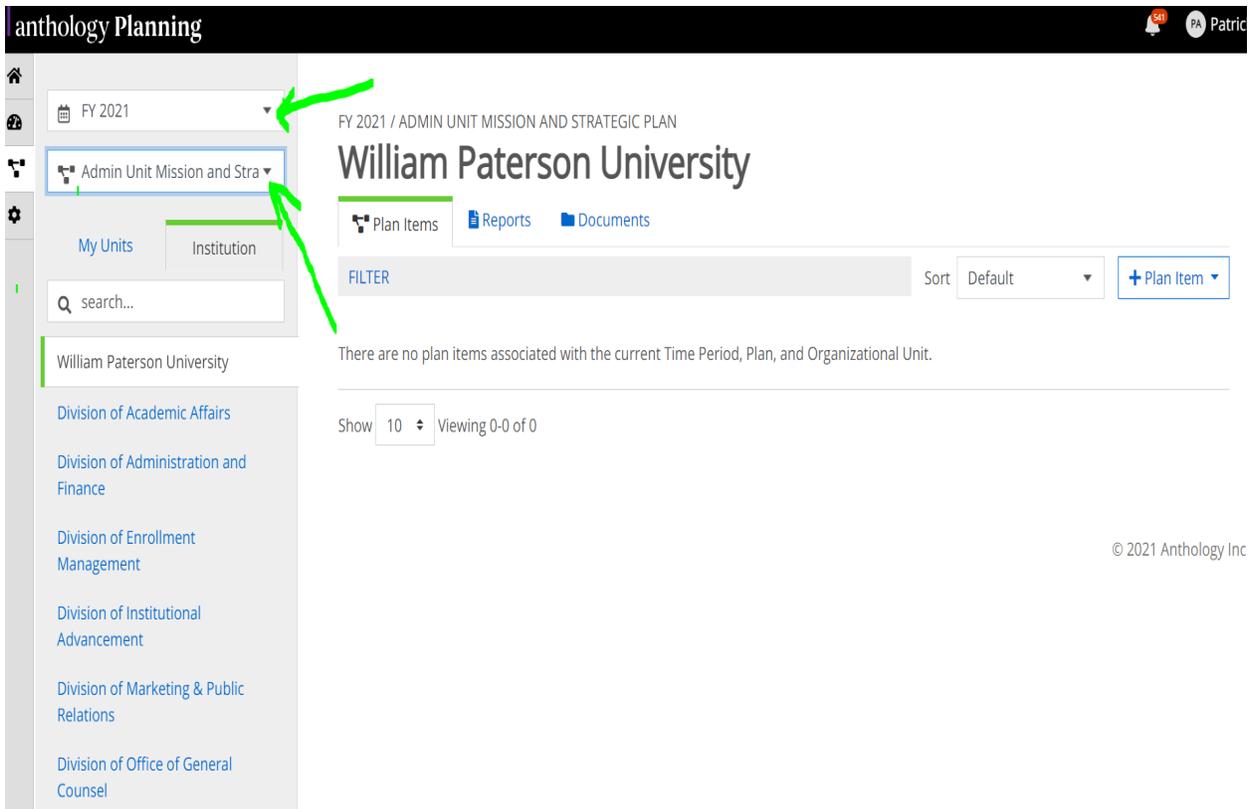
[View Status Details](#)

Mv Plan Items

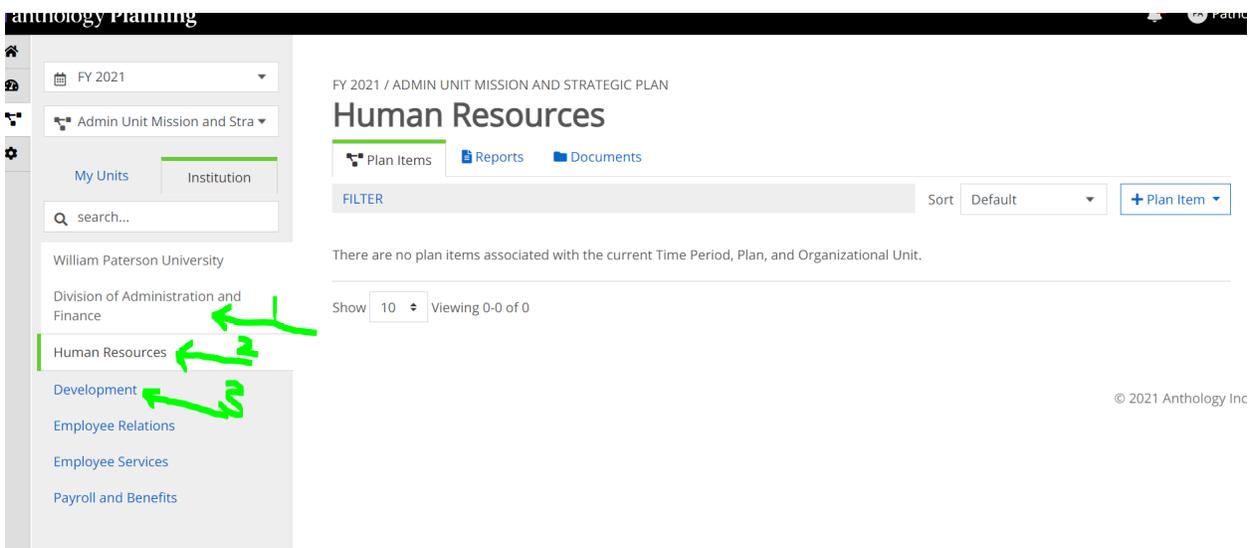
Plans

- University Mission and Strategic Plan (7/1/12 - 6/30/22)
- Unit-Level Key Performance Indicators (10/1/18 - 9/30/31)
- College Mission and Strategic Plans (7/1/18)
- Academic Program Assessment
- Academic Affairs
- Administration and Finance
- Enrollment Management
- Student Development

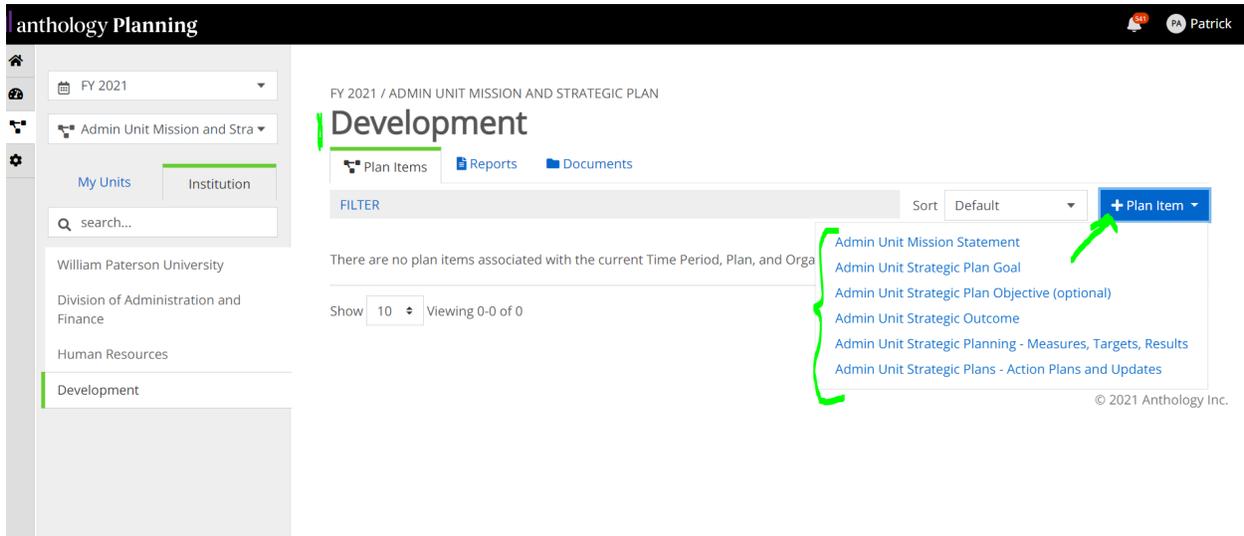
In the FY window select the Fiscal Year of your assessment (Eg. FY 2021 or 2022) from the drop-down arrow as shown below. Then select “Admin Unit Mission and Strategic Plan” as your template from the drop-down arrow as shown below.



Once that (Admin Unit Mission and Strategic Plan) is selected, you should see the list of all the Administrative Divisions beneath. Select your specific Administrative Division and click on your unit of assessment. The example below selected “**Division of Administration and Finance**” as the Division and select (clicked on) “**Human Resources**” as the unit, and then selected “**Development**” as its area of assessment.

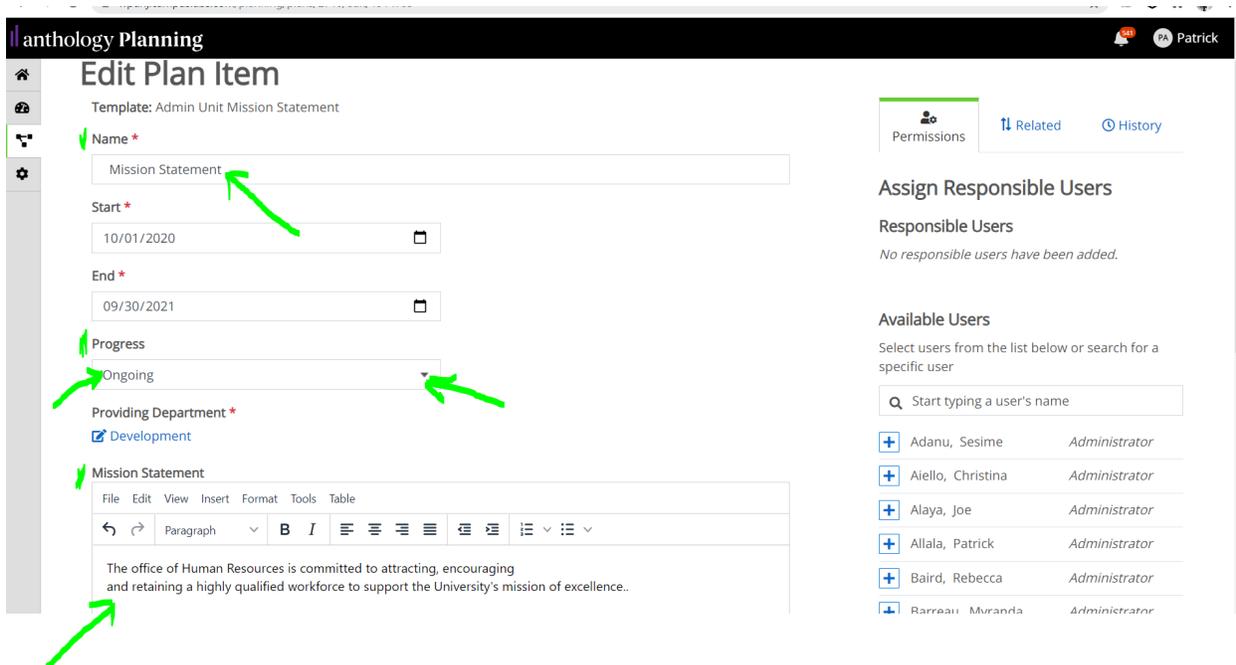


Next, in the far right-hand corner of the page, click on “Plan Item”. This should reveal all the Plan items you will be working with to complete your assessment. First, select “**Admin Unit Mission Statement**” from the list as the first template to create.

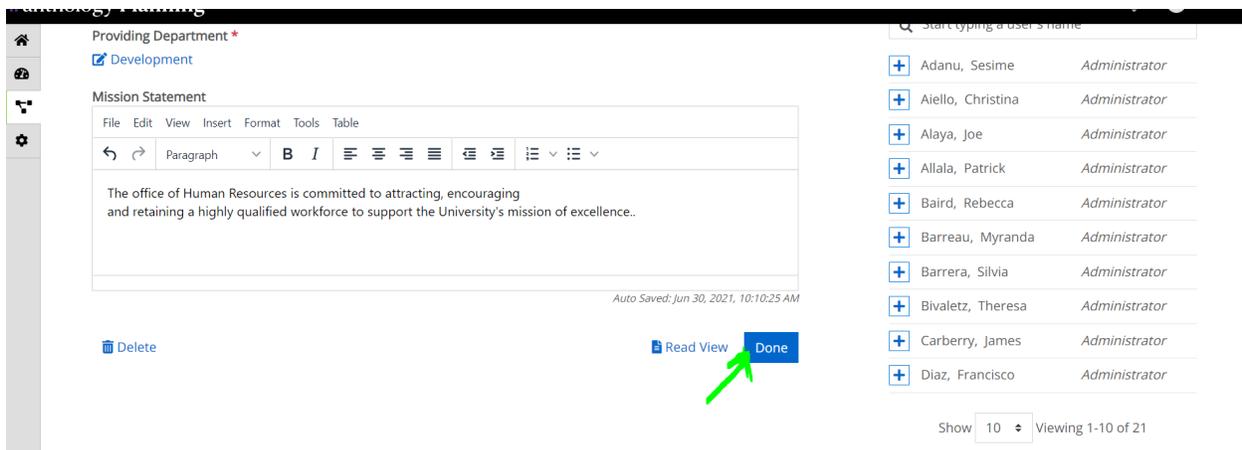


The pop-up gives you the screen below. In the “**Name**” box, you may edit the name of your mission statement as “**Mission Statement**” or “**Unit Mission Statement**”. The example below used “**Mission Statement**”. Then in the “**Progress**” box, from the drop-down arrow, select the stage at which you are in the assessment process. If it is ongoing, select “**Ongoing**”; if it is completed, select “**Complete**”, etc. Next, type in or copy and paste your mission statement in the “**Mission Statement**” box as shown below.

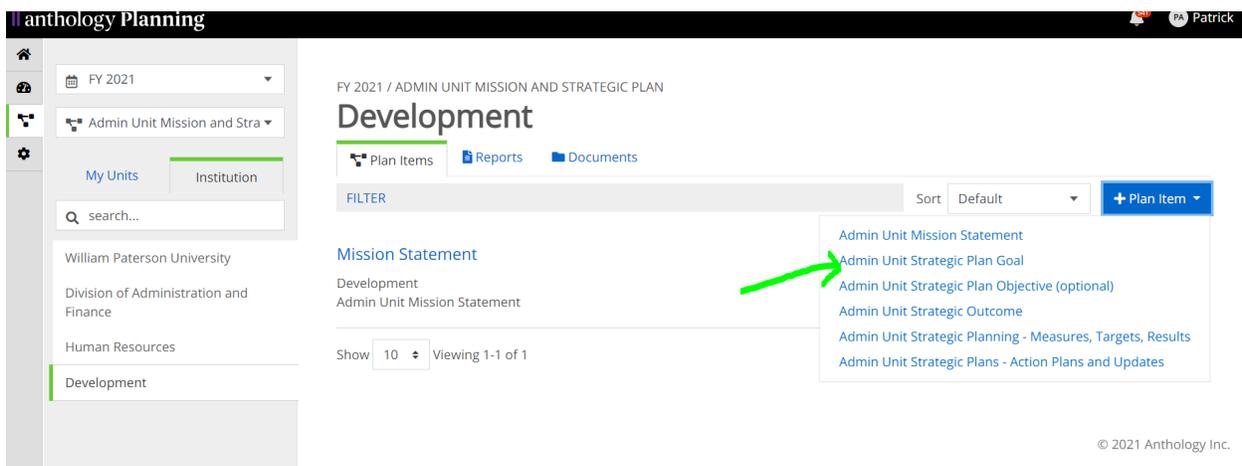
NB: Do not change the “start” and “end” dates. Leave as is. They are pre-set in the system.



Then click “**Done**” (as shown below) to save your entries.



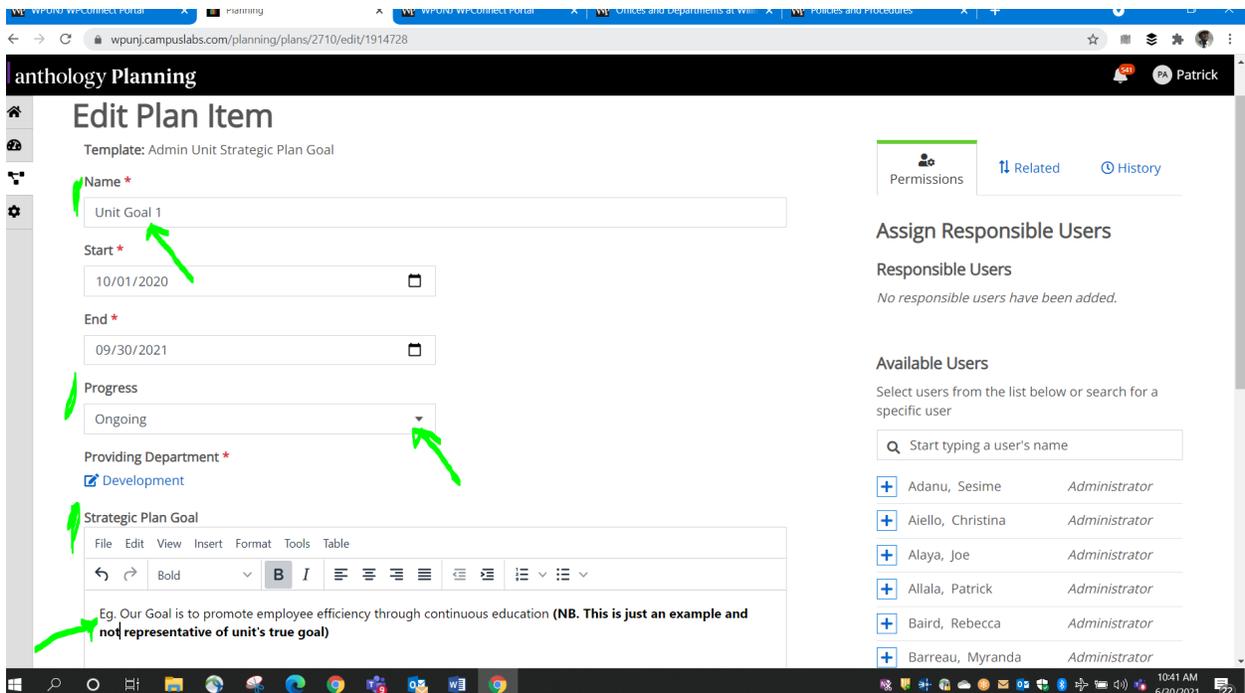
Next, go back “Plan Item”, as before, and select “Admin Unit Strategic Plan Goal” (See screen below)



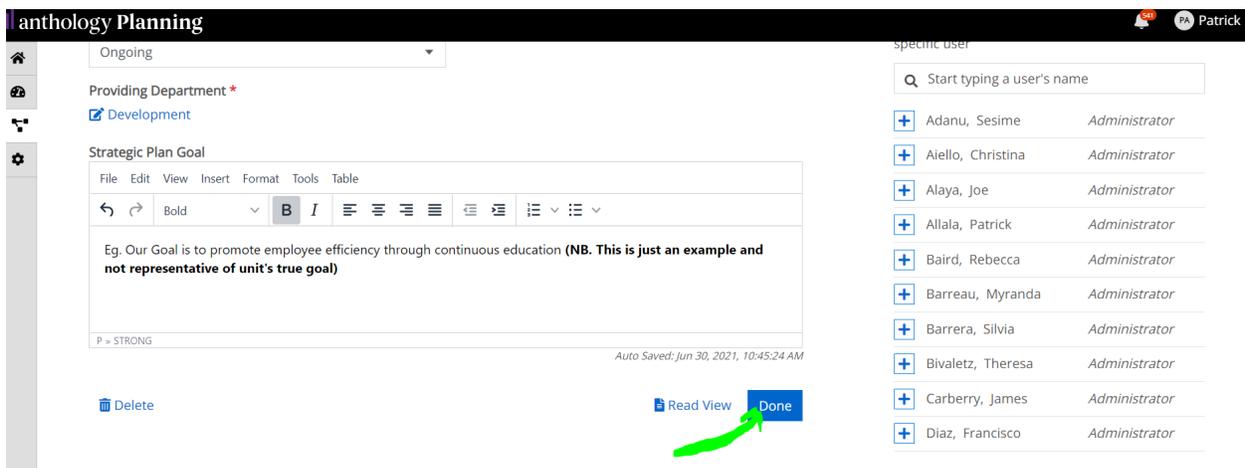
In the pop-up page, you may edit the name of your goal as “Goal 1”, “Goal 2”, “Goal 3”... (Up to the number of goals you may have as you repeat the process). Then in the “**Progress**” box select the stage at which you are in the assessment process (Eg. “**Ongoing**”) as seen below. Next, type in or copy and paste your unit goal for “Goal 1” into the “**Strategic Plan Goal**” box as shown below. Then click on “**Done**” below the Strategic “**Plan Goal**” box to save your entries.

NB. You will repeat this process for as many goals as you have for your assessment cycle. Each goal having its own page. If, for example, you have five (5) goals, you will repeat the process five times.

Again, do not change the “start” and “end” dates. Leave as is. They are pre-set in the system.



Then click on **“Done”** to save your entries as shown below.



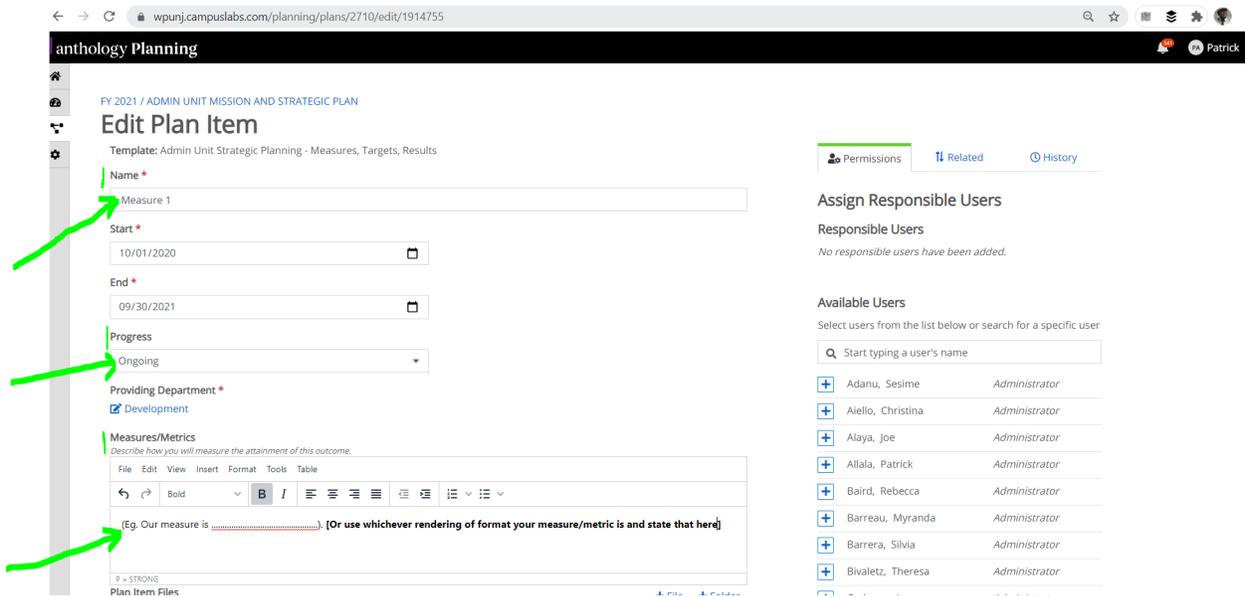
[OPTIONAL- FOR UNITS THAT HAVE OBJECTIVES]

Next, go back to **“Plan Item”** and select **“Admin Unit Strategic Plan Objective (optional)”**.

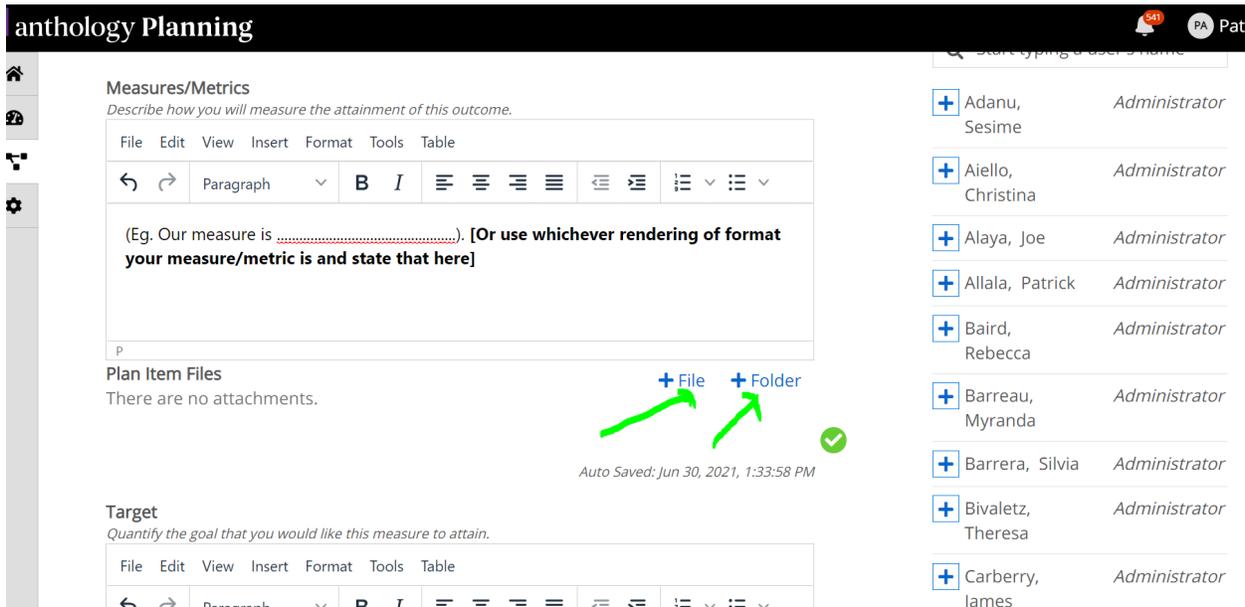
In the **“Name”** box edit the name to read **“Objective 1”**.

Leave the Start and End dates as is. Next, indicate your progress in the **“Progress”** box (ongoing, completed, On schedule, etc.).

Next, type in or copy and paste your objective into the **“Strategic Plan Objective”** box as seen below and click **“Done”** to save your entry.



Next, upload into the **“Plan Item Files”** any document relevant to the assessment process that indicate evidence of actions taken to evaluate your stated goals. Do so by clicking on **“Folder”** to give a name to the folder directory into which you will upload your document. Then click on the **“File”** menu to locate your saved document(s) for upload. **Please see screenshot below. This is not mandatory. You can instead upload all supporting documents into the “Documents” folder.**



Next, state in the **“Target”** box, your target or benchmark set as the indicator of achievement/accomplishment/success. **Please see screenshot below.**

Then in the “Results” box, describe the resultant data produced by your measure/metric, which was stated earlier above. **This would be completed when assessment is done and results are entered.**

Next, in the Target Attainment” box, select the indicator of the achievement status described above from the drop-down arrow. (Eg. “Met”, “Partially Met”, “Not Met” or “No Evidence Collected”).

anthology Planning Auto Saved: Jun 30, 2021, 1:44:00 PM Patrick

Target
Quantify the goal that you would like this measure to attain.

File Edit View Insert Format Tools Table

Paragraph B I

[STATE TARGET HERE]

P

Results
Describe the resultant data produced by the measure/metric.

File Edit View Insert Format Tools Table

Bold B I

[STATE RESULTS HERE]

P » STRONG

Plan Item Files

There are no attachments

+ File + Folder

Item Visibility

- Select Users
Viewable only by item creator, responsible users, and users with permissions to Admin Unit Strategic Planning - Measures, Targets, Results
- Org Level Permissions
Viewable by users with permissions to Development
- All Users
Viewable to all users, unless they are set to 'No Access'

NB. Below the “Result” box is the provision to load up any supporting document of your result attainment.

anthology Planning Auto Saved: Jun 30, 2021, 1:18:36 PM Patrick

Results
Describe the resultant data produced by the measure/metric.

File Edit View Insert Format Tools Table

Bold B I

[STATE RESULTS HERE]

P » STRONG

Plan Item Files

There are no attachments.

+ File + Folder

Target Attainment
Was the stated target met?

Met

Delete Read View Done

Item Visibility

- Select Users
Viewable only by item creator, responsible users, and users with permissions to Admin Unit Strategic Planning - Measures, Targets, Results
- Org Level Permissions
Viewable by users with permissions to Development
- All Users
Viewable to all users, unless they are set to 'No Access'

Then click **“Done”** to save your entries.

Action Plan Template

You will use this template only if your assessment findings (results) reveal shortfalls or gaps that need to be addressed in the next academic year. (Example, not meeting established target(s), encountering issues that prevented you from meeting your target). You do not need to use this template if all benchmarks are met.

To use this template, go back to **“Plan Item”** and click on **“Admin Unit Strategic Plans – Action Plans and Updates”**.

In the pop-up page, edit the **“Name”** to read **“Action Plans and Updates”** (as seen in the screenshot below).

anthology Planning

FY 2021 / ADMIN UNIT MISSION AND STRATEGIC PLAN

Edit Plan Item

Template: Admin Unit Strategic Plans - Action Plans and Updates

Name *
Action Plans and Updates

Start *
10/01/2020

End *
09/30/2021

Progress
Ongoing

Providing Department *
 Development

Action Plans and Updates
Dating each entry, describe what actions will be undertaken based on the results of this assessment. You may come back to add updates. Please add dates to all entries.

File Edit View Insert Format Tools Table

Permissions | Related | History

Assign Responsible Users

Responsible Users
No responsible users have been added.

Available Users

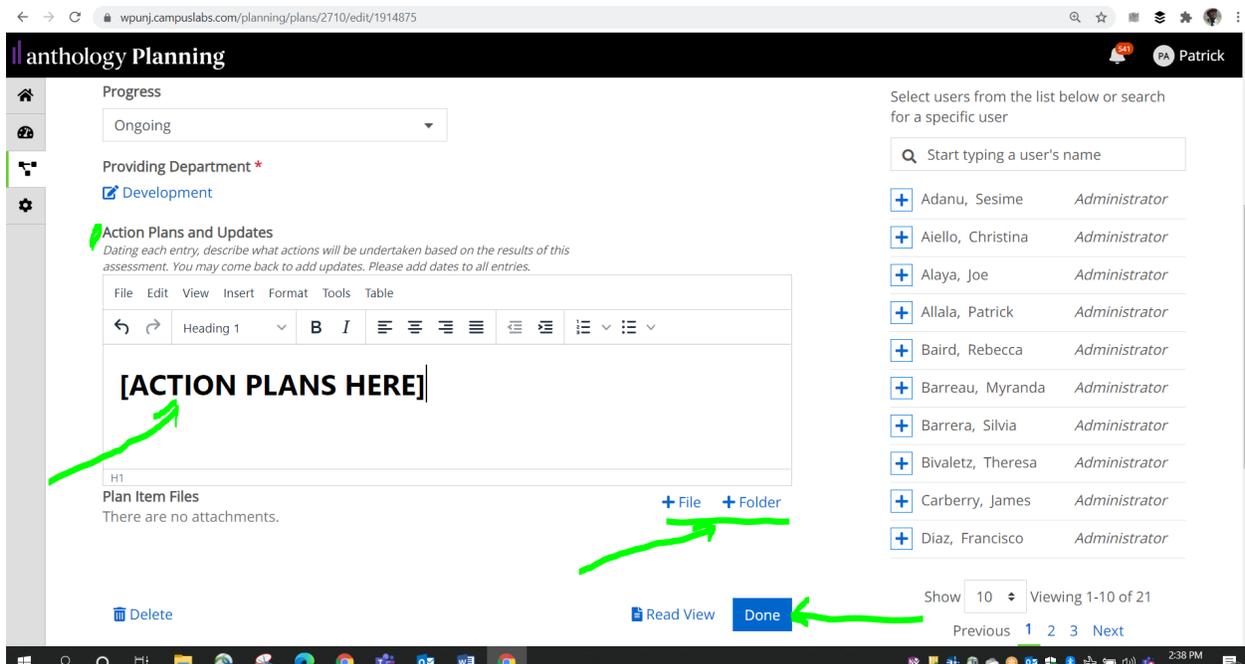
Select users from the list below or search for a specific user

Start typing a user's name

- + Adanu, Sesime Administrator
- + Aiello, Christina Administrator
- + Alaya, Joe Administrator

2:34 PM 6/20/2021

Then in the **“Action Plans and Update”** box, state your action plans based on the results of the achievement reported; outcomes not met or no evidence collected; and what the plan is going forward – aiming at the improvement of what has been achieved. State the Outcome number to which the Action Plan is being associated with.



NB: Please, be sure you date each entry and describe what actions will be undertaken based on the results of this assessment. You may come back to add updates or delete wrong entries (if in error).

You may also upload additional documents about future action plans based on the results of the assessment

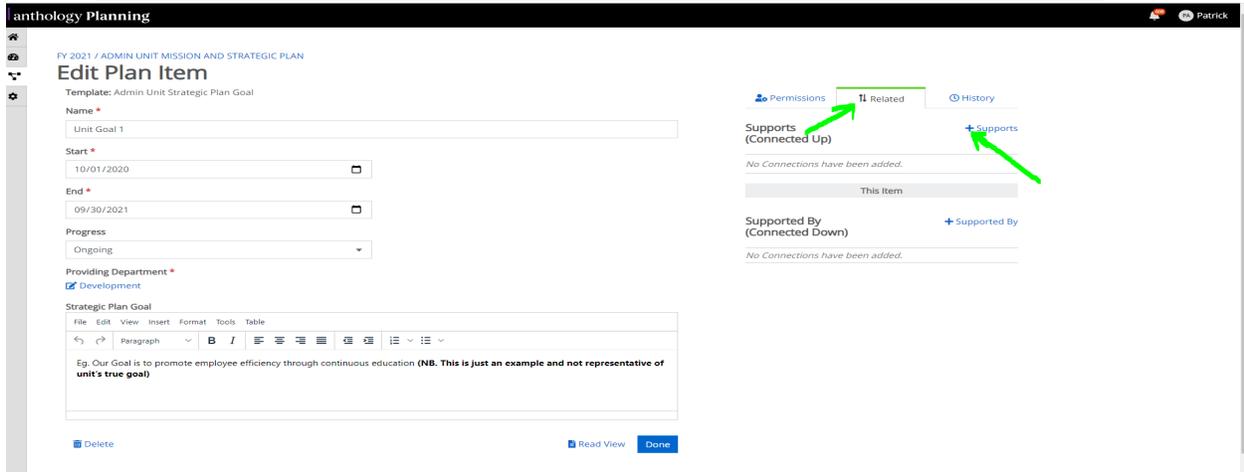
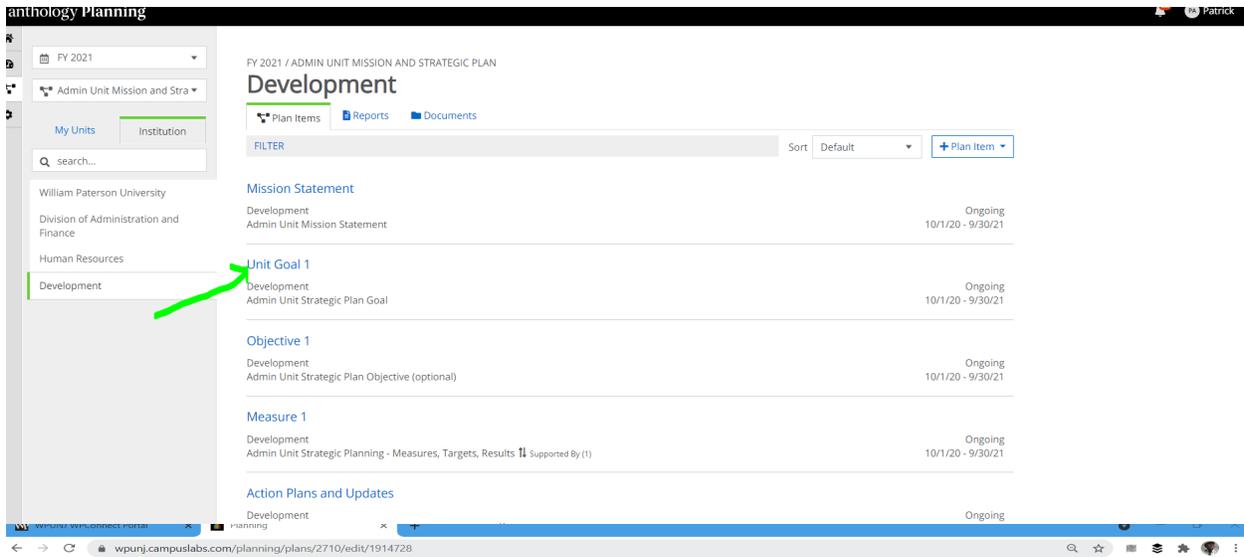
AGAIN, PLEASE ADD DATES TO ALL ENTRIES.

Then click on “Done” to save all entries.

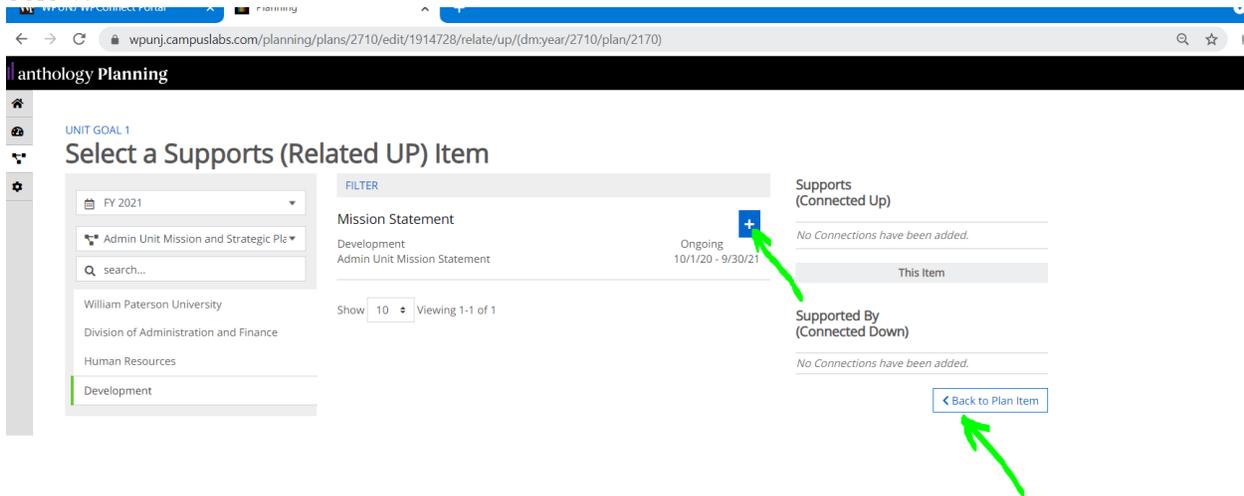
[Relating or Connecting of Plan Items]

You would need to relate (connect) your Planning items for your assessment to generate the relevant results in your Report Template.

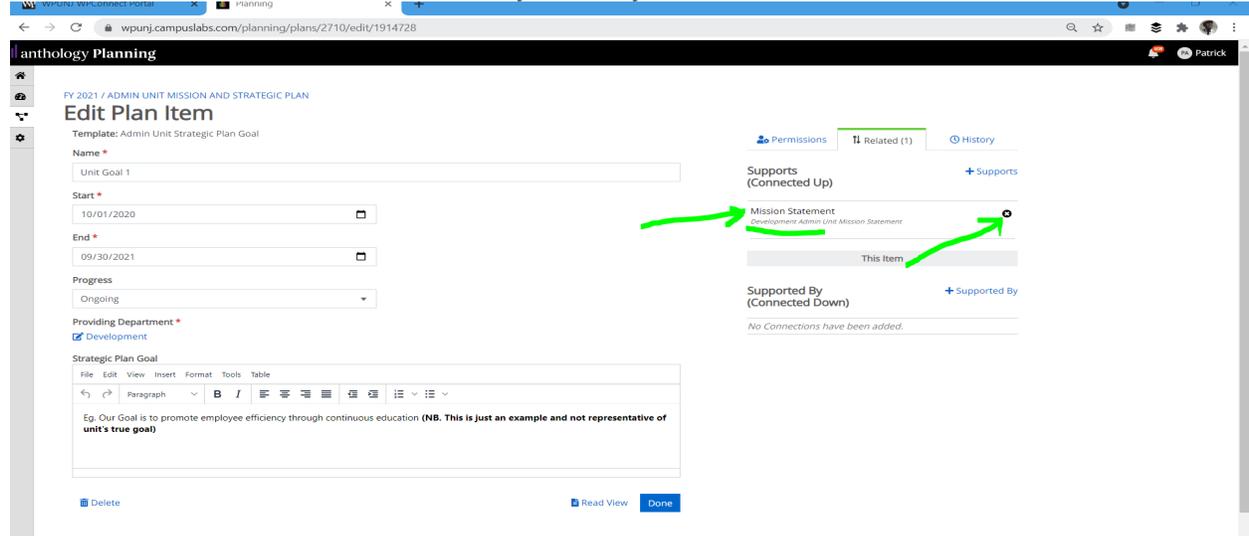
First, click on your “Unit Goal 1” and to the top right corner, select “Related” and then click on “Support (connected UP)” plus sign by it [+ Supports] as shown below.



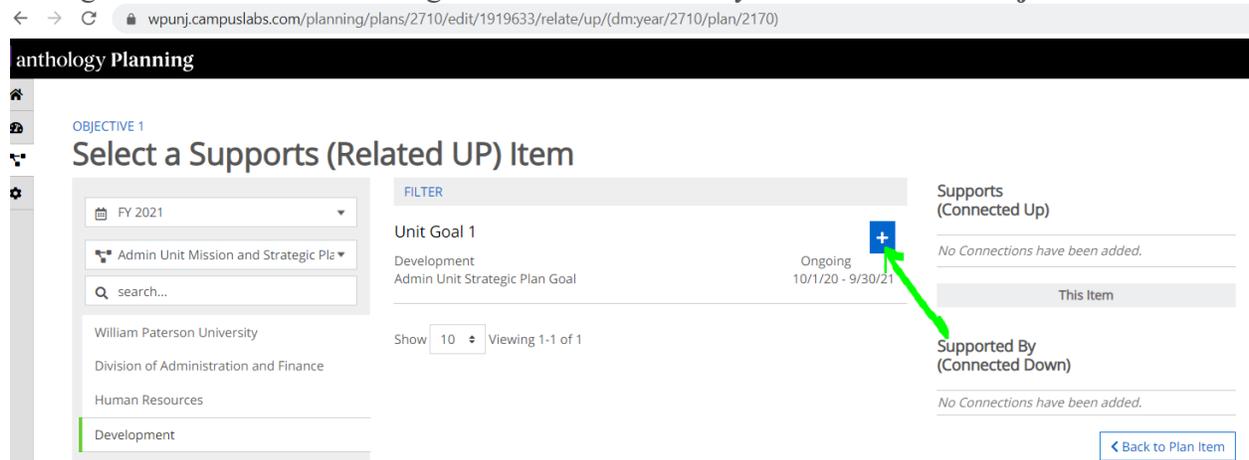
Next, click on the Mission Statement plus sign [+] by it to connect your mission statement to your Goal(s). Next, click on “**Back to Plan Item**” to return to your Goal template as shown below.



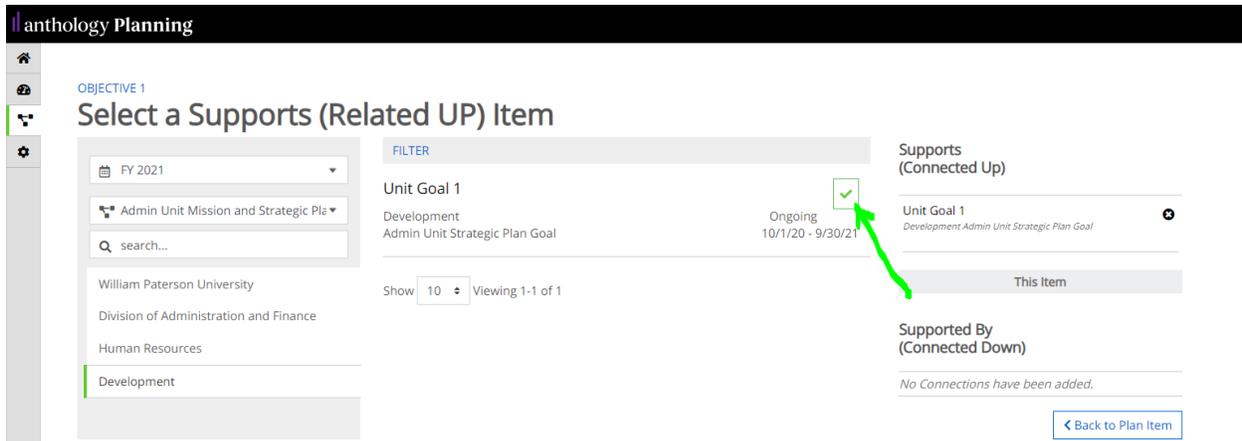
You should see a black “x” [x] by the connected Mission Statement to your far right indicating a connection. Next, click “Done” to save your entry.



Next, click on “Objective” to connect your Goal 1 (or corresponding goal) to your “Objective” by clicking on the plus sign to your right of “Goal 1”. Once the plus sign is clicked, you should see a green check mark indicating a connection between your “Goal” and “Objective”.



The green check sign indicating connection between “Objective” and “Unit Goal” below.



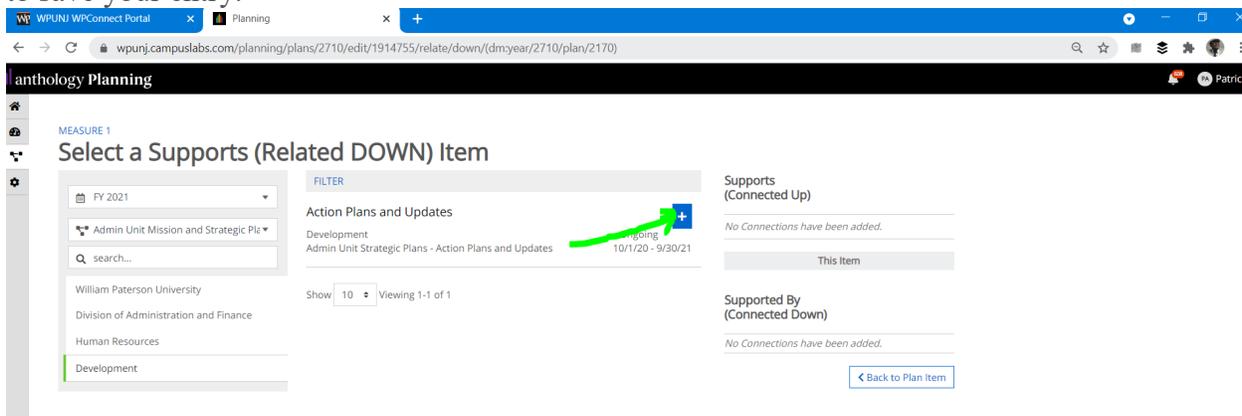
Next, click on **“Back to Plan Items”** to return to the **“Objective”** template and click **“Done”** to save your entry.

[CONNECTING YOUR MEASURE TO YOUR ACTION PLAN & UPDATES]

Click on your **“Measure 1”**, then (using the **“Supported By [Connected Down]”**), click on + **Supported By** plus sign as shown below.

Next, on the popped up page, click on the blue **[+]** (plus) sign to the right of **“Action Plans and Updates”**. You should see a green check mark indicating that a connection is being made between **“Measure 1”** and **“Action Plans and Updates”** as shown below.

Next, click on the **“Back to Plan Item”** to return to the **“Measure 1”** template and click **“Done”** to save your entry.



anthology Planning

FY 2021 / ADMIN UNIT MISSION AND STRATEGIC PLAN

Edit Plan Item

Template: Admin Unit Strategic Planning - Measures, Targets, Results

Name *
Measure 1

Start *
10/01/2020

End *
09/30/2021

Progress
Ongoing

Providing Department *
 Development

Measures/Metrics
Describe how you will measure the attainment of this outcome.

File Edit View Insert Format Tools Table

(Eg. Our measure is). (Or use whichever rendering of format your measure/metric is and state that here)

Permissions Related History

Supports (Connected Up) + Supports
No Connections have been added.

This Item

Supported By (Connected Down) + Supported By
No Connections have been added.

anthology Planning

MEASURE 1

Select a Supports (Related DOWN) Item

FY 2021

Admin Unit Mission and Strategic Pla

search...

William Paterson University
Division of Administration and Finance
Human Resources
Development

FILTER

Action Plans and Updates

Development
Admin Unit Strategic Plans - Action Plans and Updates

Ongoing
10/1/20 - 9/30/21

Show 10 Viewing 1-1 of 1

Supports (Connected Up)
No Connections have been added.

This Item

Supported By (Connected Down)

Action Plans and Updates
Development Admin Unit Strategic Plans - Action Plans and Updates

[Back to Plan Item](#)

File Edit View Insert Format Tools Table

[STATE RESULTS HERE]

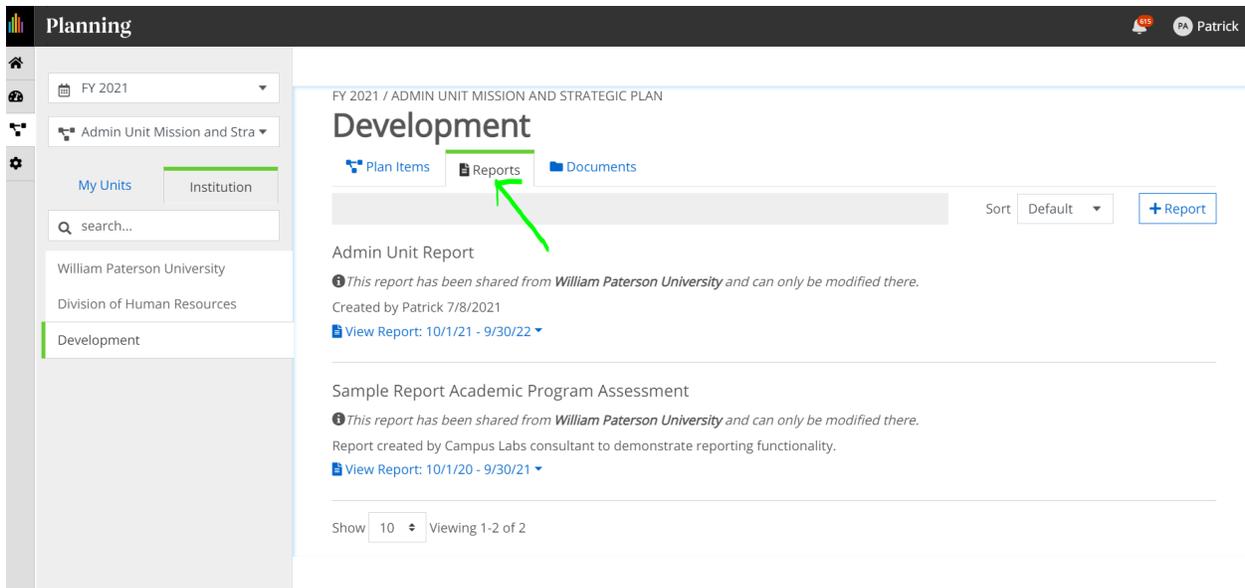
Plan Item Files
There are no attachments. [+ File](#) [+ Folder](#)

Target Attainment
Was the stated target met?
Met

[Delete](#) [Read View](#) [Done](#)

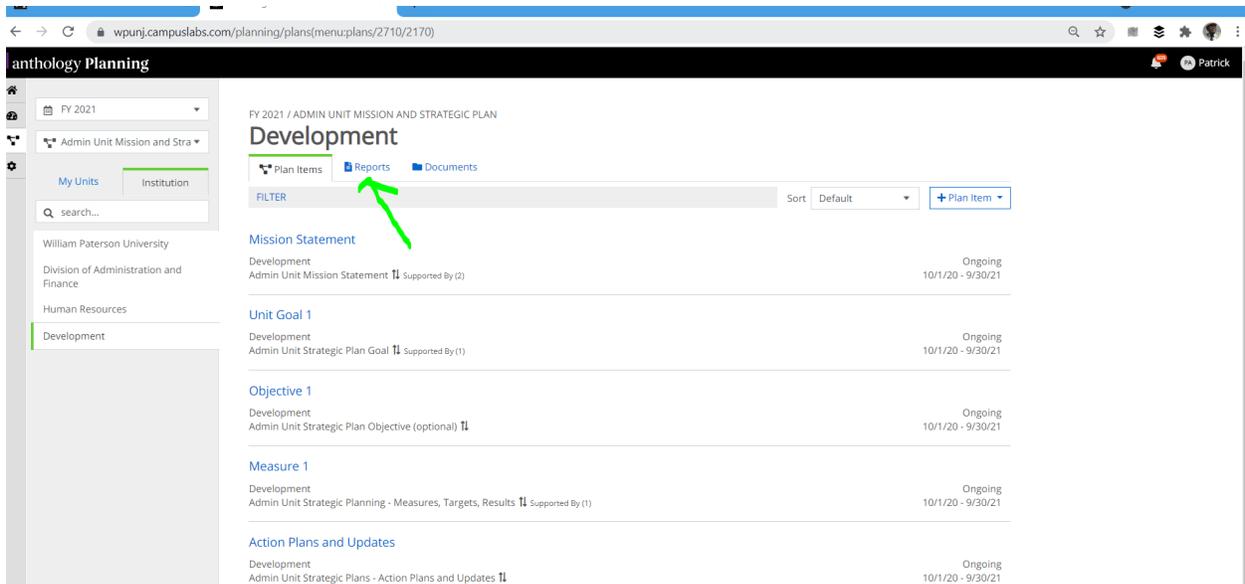
NB: The process above to relate (connect) items should be repeated for as many Goals, Objectives, Measures, and Action Plans and Updates as you have entered for the assessment cycle.

THE GENERATION, PRINTING & SAVING OF RESULT/REPORT

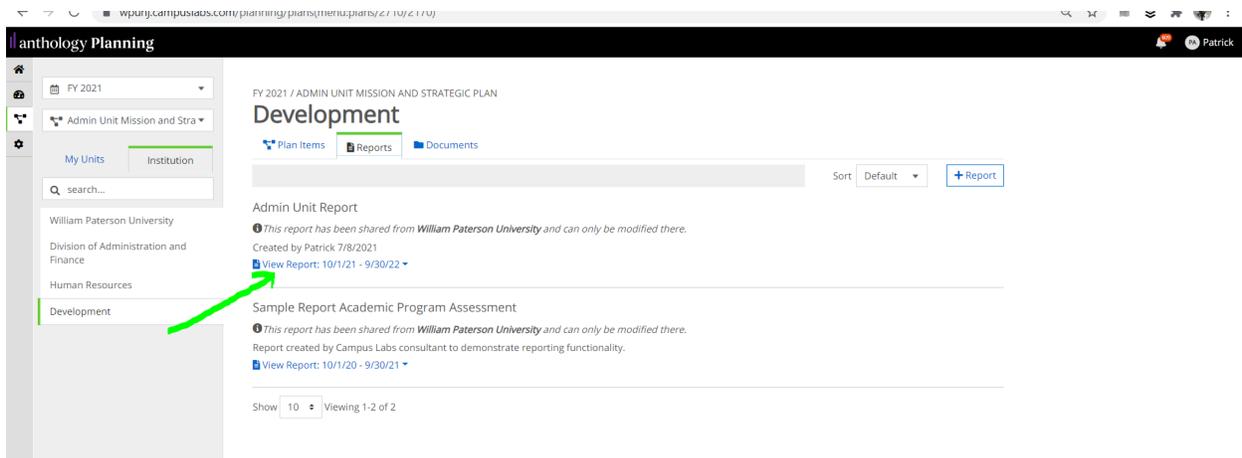


After all items have been connected, now is the time to generate your report from the assessment just completed.

To do this, click on “Report” at the very top of the page to open the “Report” template as shown below.



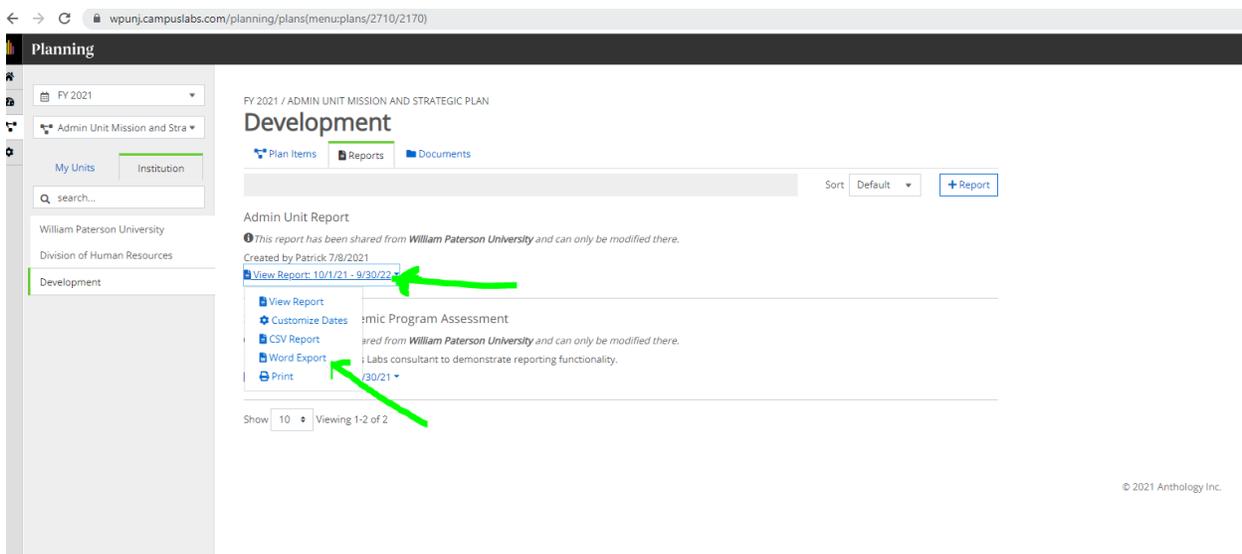
Next, click on the “View Report: 10/1/21-9/30/22” to load up your assessment report as shown below.



You may decide to load up your report in either Word Document (most preferred), CSV, or PDF format.

In Word Document

Under “Admin Unit Report”, click on “View Report: 10/1/21 – 9/30/22” and select “Word Export”, as shown below, and click on it.



[NB: The loading-up takes between a few seconds to 3 minutes to finally load up]

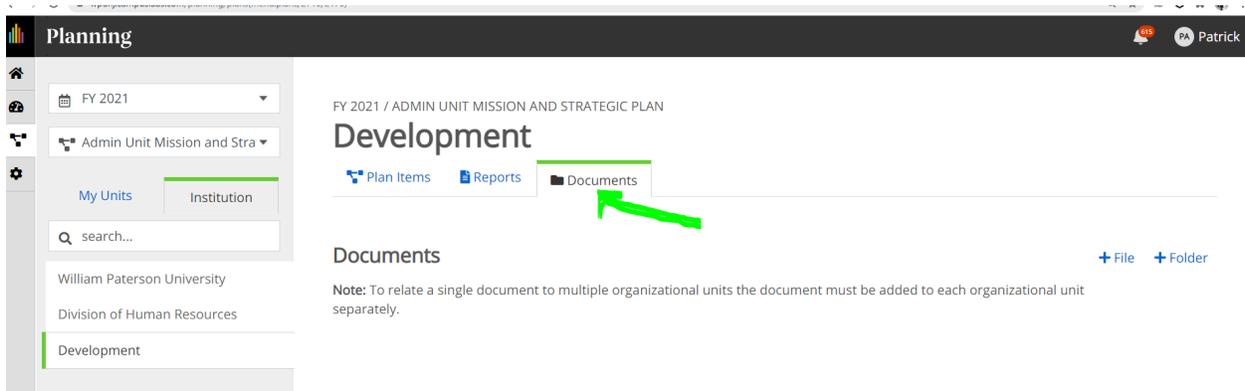
Save a copy of the generated report in a *temporary folder* on your computer (*Document folder, Desktop, etc.*) to be transferred into the “**Documents**” folder in Planning.

Documents Folder

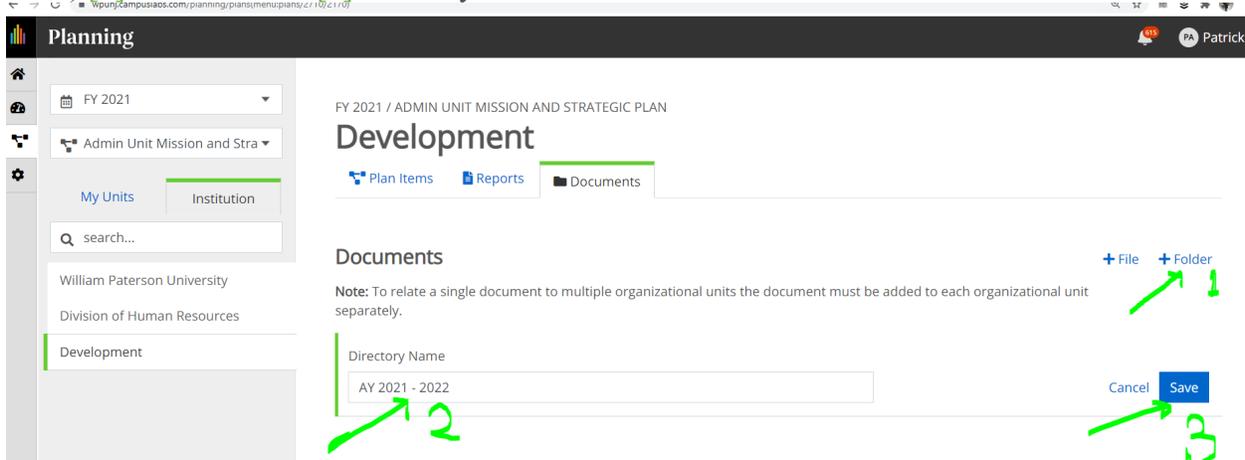
To save a copy of the generated report in the appropriate folder in **Planning** associated with each academic year, follow the steps below to create the folders for respective academic years if they are not already created.

Creating Folders for Reports and Documents in “Documents” in Planning

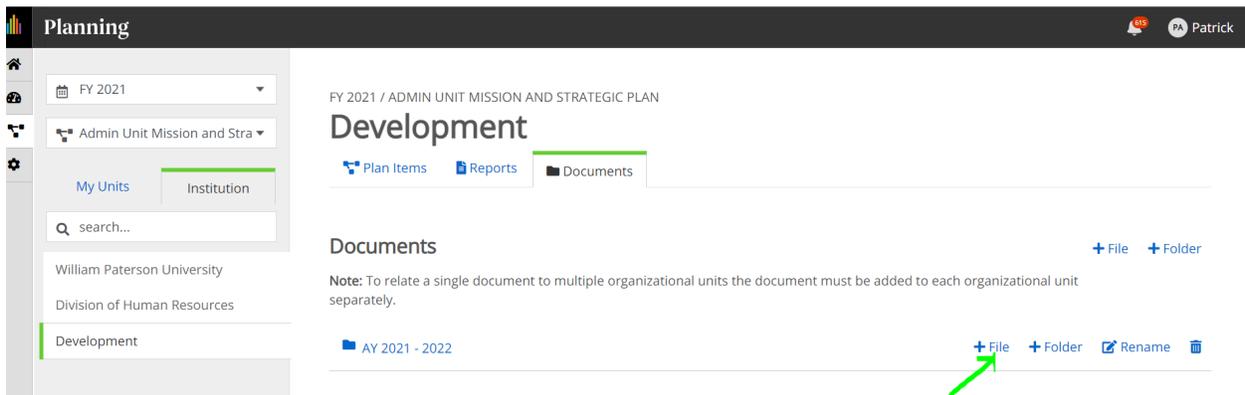
While logged into Planning and under your program portal, click on the “Documents” tab at the top as shown below.



Next, click on “+Folder” [1] (to your far right) and type in your folder name (e.g. AY 2021-2022) [2]. Click “save” [3] to save your new folder. See screenshot below.



Upload the report and other documents into the folder by clicking on “+File” as shown below.



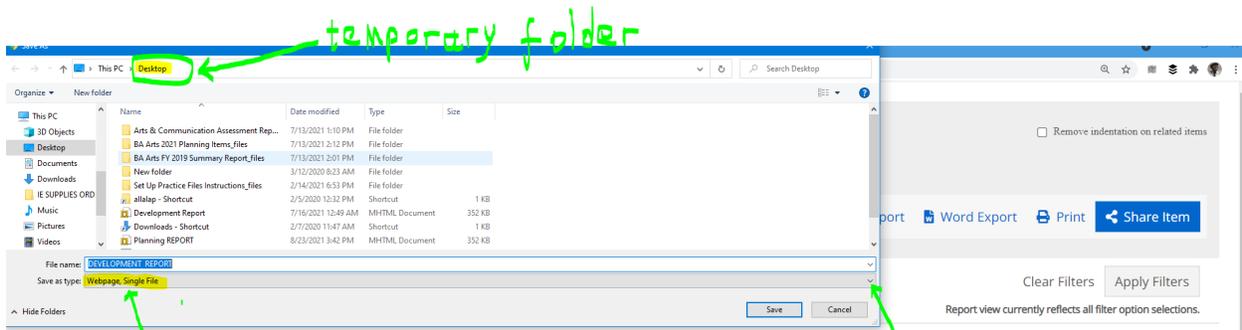
Next, locate (search for) the document file from the temporary folder (Desktop, Document, etc.) in which report was temporarily saved. Open the file and save the **report** now into the new folder created under “**Document**” in Planning (AY 2021 -2022).

PRINTING OF REPORT

To print your report, click the “Print” button to your far-right-top-corner of the page.

REPORT IN PDF

Create a folder on the desktop or your personal drive for temporary housing of the generated report. Right-click on the generated report and select “Save As”. In the “Save as type” window, select “Webpage, Single File” from the drop-down arrow. Next, click “Save” to save the generated report to your temporary folder (to be deleted later).



Development

Mission Statement

Mission Statement:
Mission XXXXXXXXXXXXXXXXXXXXXXXXXXXX

Goal 1 XX

Strategic Plan Goal:
Goal is XXXXXXXXXXXXXXXXXXXXXXXX

Providing Department: Development

OBJECTIVE, OUTCOME, MEASURE

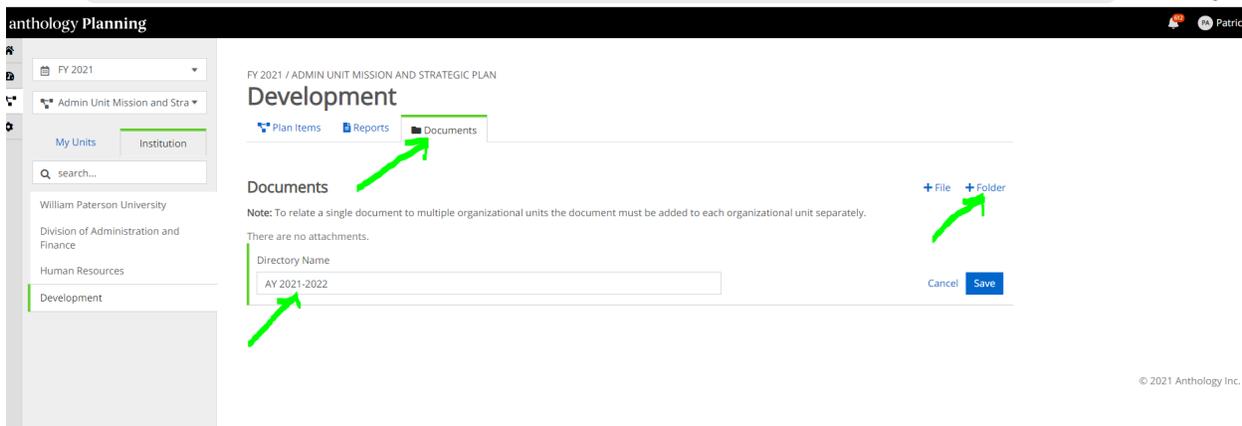
RELATED ITEM LEVEL 1

Objective (optional) IXX

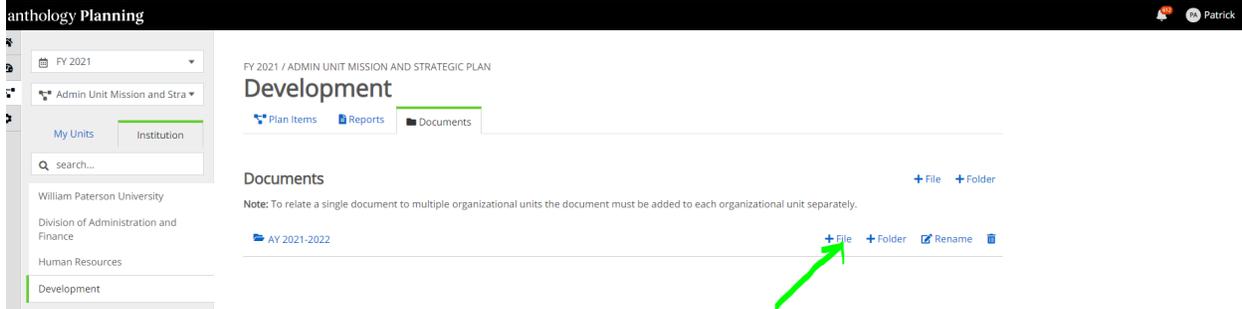
Strategic Plan Objective:
Our objective XXXXXXXXXXXXXXXXXXXXXXXX

RELATED ITEM LEVEL 1

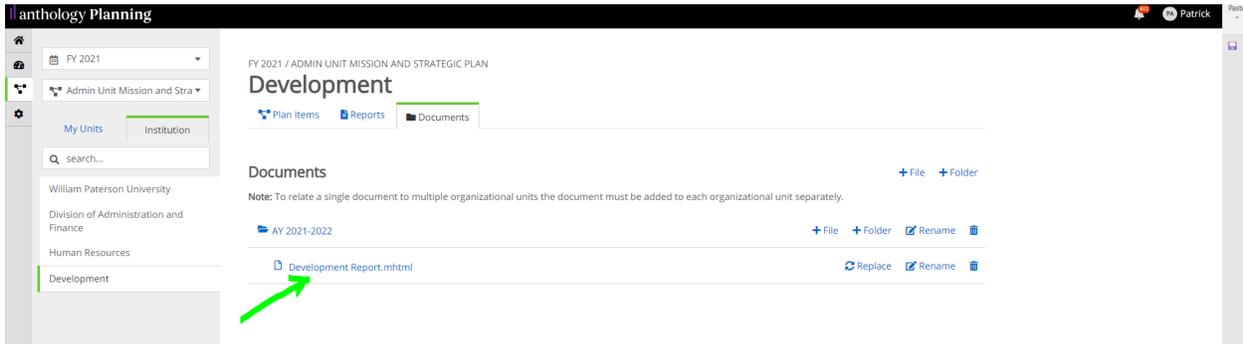
Next, go back to the “Report” template and click on “Documents”, then on “Folder” to create and name the folder AY 2021–2022 as shown below.



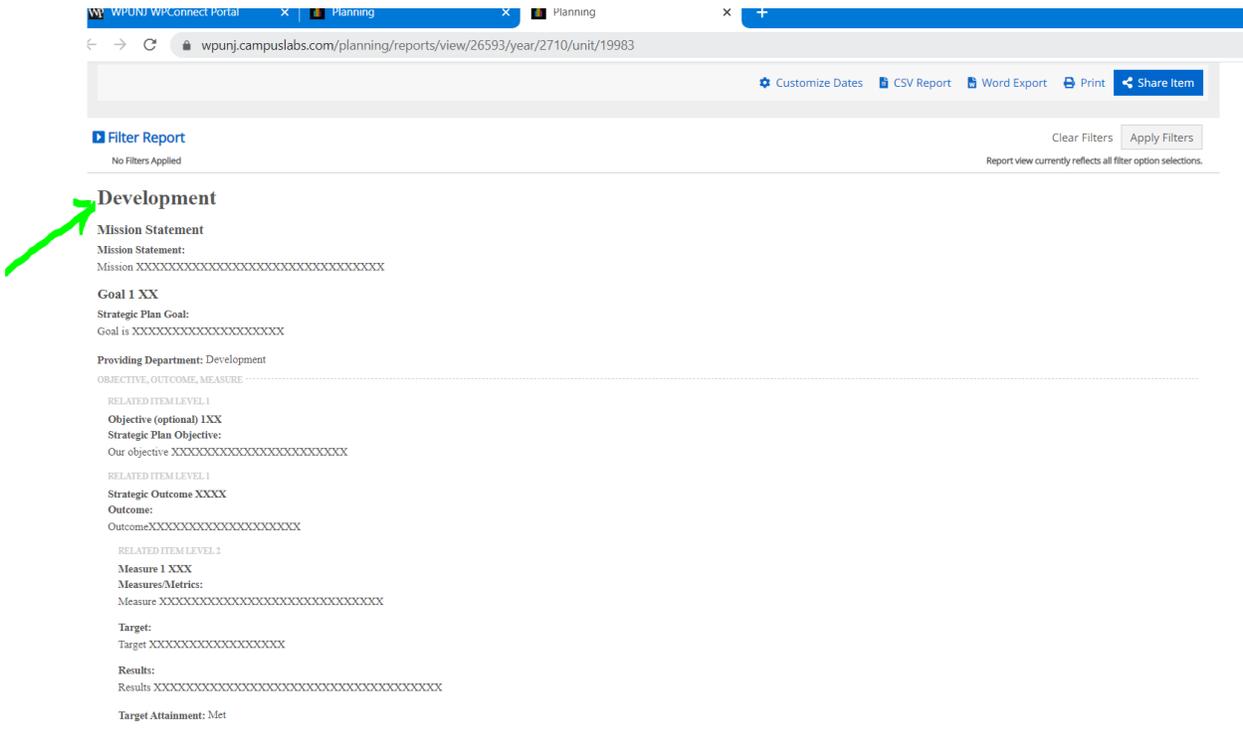
Next, click on “File” and search for your saved “Development Report” from your desktop and select it.



Next, click on “Open” to load up the “Development Report” into your newly created Folder: AY 2021-2022 as shown below.



Below is a sample of the pdf report profile (In our case, the report of the Development Unit under HR as generated by this demo).



[End of Assessment and THANK YOU FOR THE GOOD JOB DONE!!!]