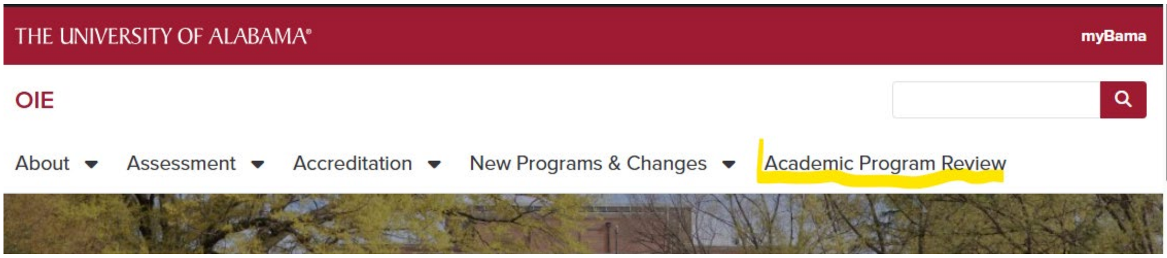
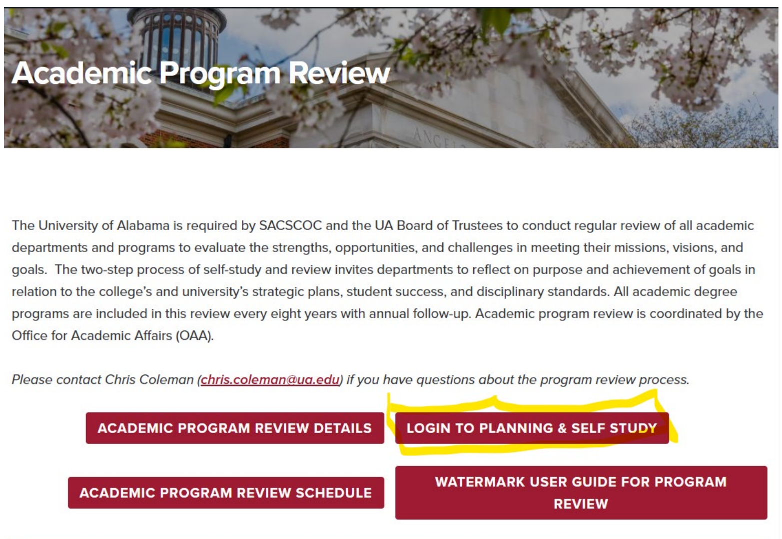
Contents

Initial Login Instructions

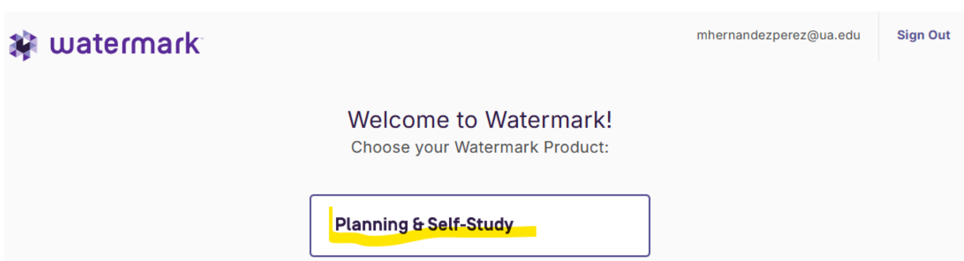
1. Navigate to oie.ua.edu
2. Select Academic Program Review on the top-right ribbon



3. Scroll down and select Login to Planning & Self Study



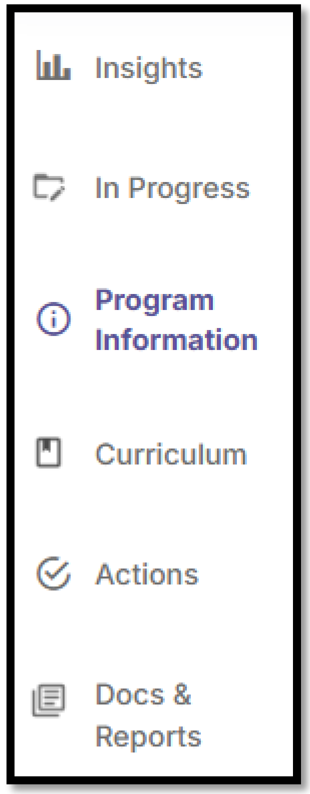
4. Select Planning & Self Study (other options will be visible depending on your role)



5. The Welcome page will list all the programs you have access to. Select Enter Program to the right of any of them to begin working on that program.

Navigating the Menu

Within each program, there will be a menu on the left.



1. **Ignore** the following areas:
    a. Insights
    b. Curriculum
2. Areas in the order you will use them:
    a. **Program Information:** Houses the mission, the outcomes, any outputs used, and the measures. This section ensures these areas can be automatically moved from one year to the next.
    b. **Docs & Reports:** Repository for documents used internally. These documents will not be automatically added to the annual reports. If available in Taskstream, OIE has uploaded your curriculum map here.
    c. **In Progress:** This is the area where you will add the results and actions for this cycle.
    d. **Actions:** In the future you will return to this area to see the actions the program has developed over the years and update their status.

Planning & Self-Study Instructions

The Annual Degree Curriculum & Learning Report (previously Annual Report) is a tool used for two separate audiences. The faculty are meant to use it to:

- Document the evidence collected during the cycle
- Record the faculty's collective interpretation of the results
- Capture the program-level decisions made to strengthen the curriculum
- Preserve continuity when faculty, coordinators, or administrators change

External reviewers use it during the peer-review process of accreditation to:

- Review evidence of intentional design, delivery, and improvement

This workbook is designed to guide you step-by-step through the core components of the Planning & Self-Study assessment report. Each component is organized into separate pages by tab, making it easy to match the instructions in the workbook with what you see on the screen. Every page in these sections follows the same simple structure so you always know what to expect, no matter which tab you are working in. Each page includes:

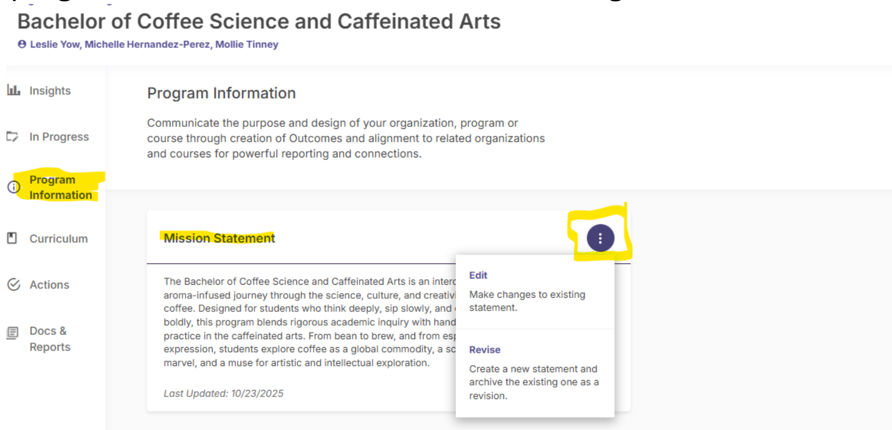
Location	YourProgram > Add Measure
Tab	Title
Provides Reviewer	Descriptive title that allows the reviewer to track the measure in other parts of the report.
	Title* PLO1-Measure 3: ETS Major Field Test 36/255
Description	Titles can be up to 255 characters. Use a naming convention that allows tracking the measure in other parts of the report. Include: **PLO number + Measure number + Descriptive title**
Required Actions	1. Type in a title for the measure.

- **Location** – Shows exactly where to find the tab within Planning & Self-Study.
- **Tab** – Identifies the name of the tab you will be working in.
- **What it provides external reviewers with** – Explains the purpose of the tab and what reviewers learn from the information you enter.
- **Screenshot** – Gives you a visual reference so you know what the tab should look like.
- **Description** – A plain-language explanation of what to enter and how the tab fits into the assessment process.
- **Required Actions (What to Press)** – A short list of the buttons, menus, or selections you must use to complete the task.

These pages are designed to function like a roadmap. You can move through them in order when completing your report for the first time, or you can jump directly to a specific tab when you need a quick reminder. The consistent format across all three sections—Measures, Results, Actions—helps ensure that the work you enter is accurate, consistent, and aligned with the needs of the faculty and external reviewers. Feel free to use this workbook as both a training tool and a reference guide throughout the reporting cycle.

Adding the Mission

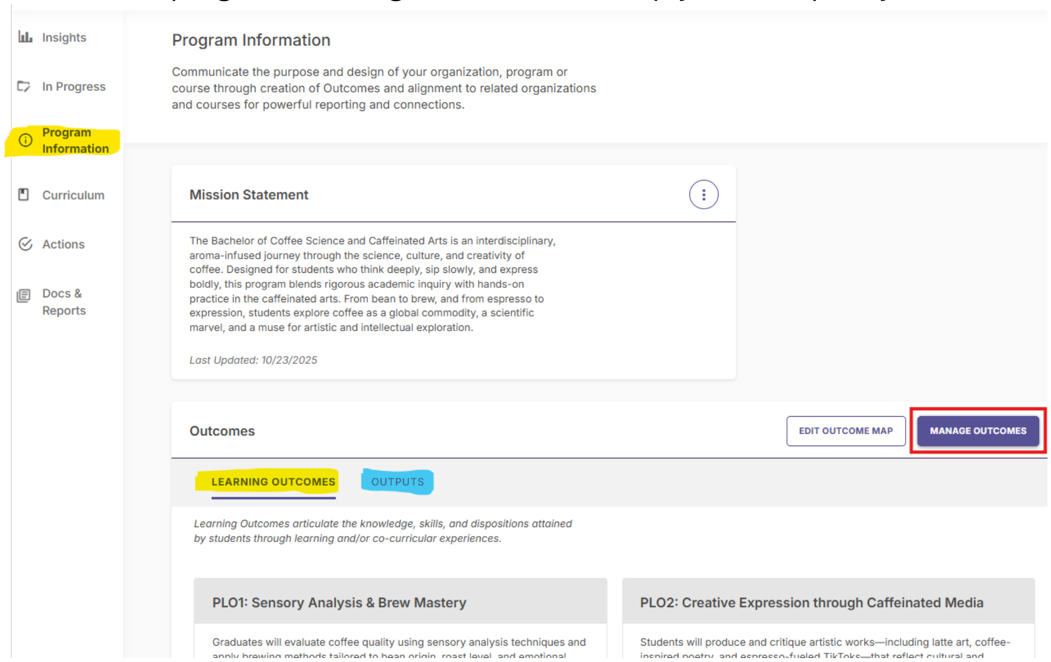
Location	YourProgram > Program Information
Tab	Add Mission
Provides Reviewer	Official program’s mission as reflected in the catalog.

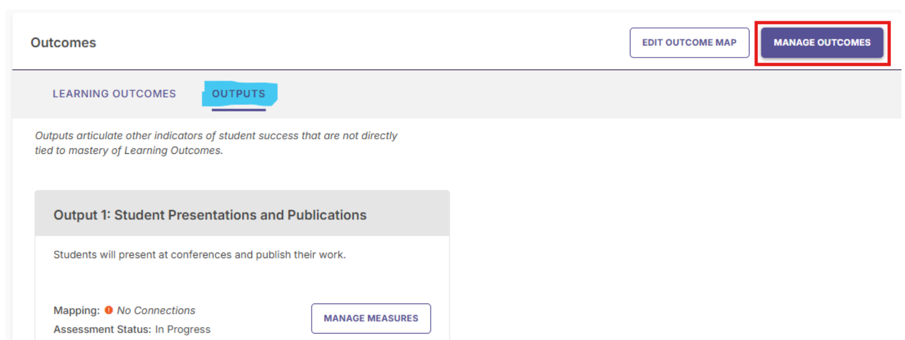


Description	Selecting Add Mission opens a text box.
Required Actions	1. Select ‘*Program Information*’. 2. Select ‘*Add Mission*’. 3. Copy/Paste your mission from the catalog. 4. Select the checkmark to save changes

Program Learning Outcomes

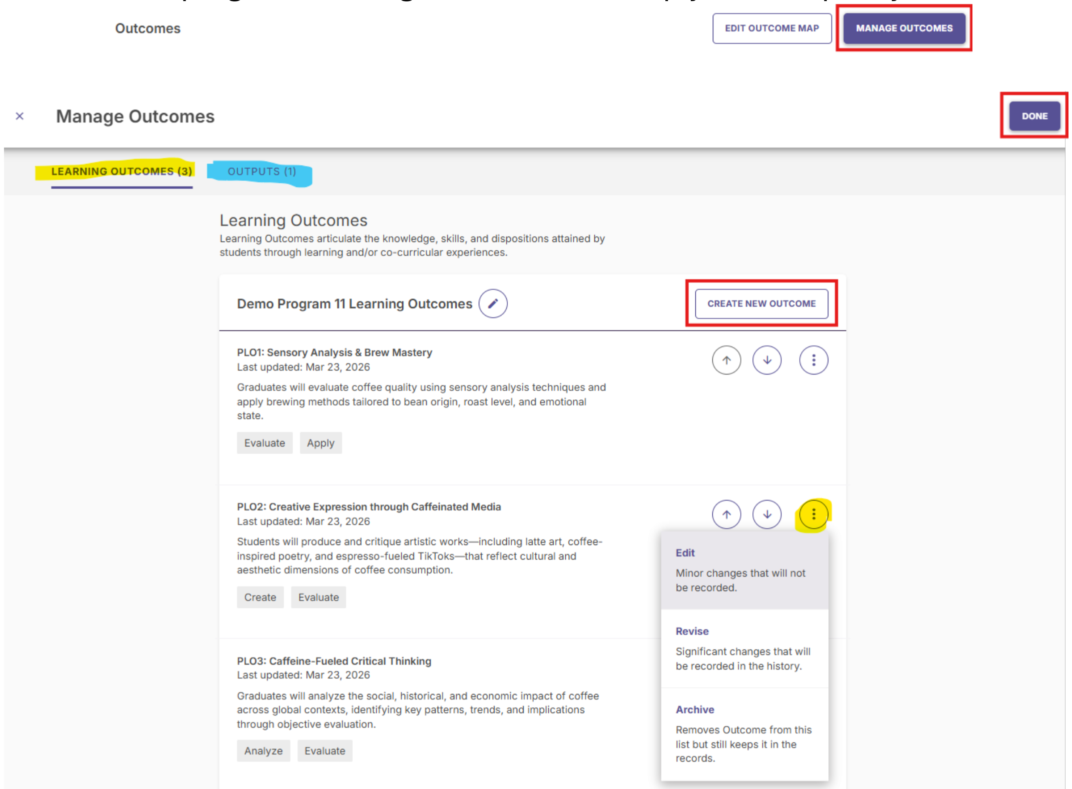
Location	YourProgram > Program Information
Tab	Outcomes
Provides Reviewer	Minimum of 3 program learning outcomes to comply with UA policy.





Description	During Spring 2026, OIE transferred all outcomes from Taskstream into P&SS. If the narrative met the requirements for a program learning outcome, they were added into the Learning Outcomes tab. If the narrative did not meet the requirements, they were placed in the Outputs tab (blue). This ensures the reviewers will first see outcomes rather than outputs when reading the report.
Required Actions	1. Review that all outcomes appear in this section.

Location	YourProgram > Program Information
Tab	Manage Outcomes
Provides Reviewer	Minimum of 3 program learning outcomes to comply with UA policy.



Description

The system allows for editing, revisions, and archival of the outcomes.

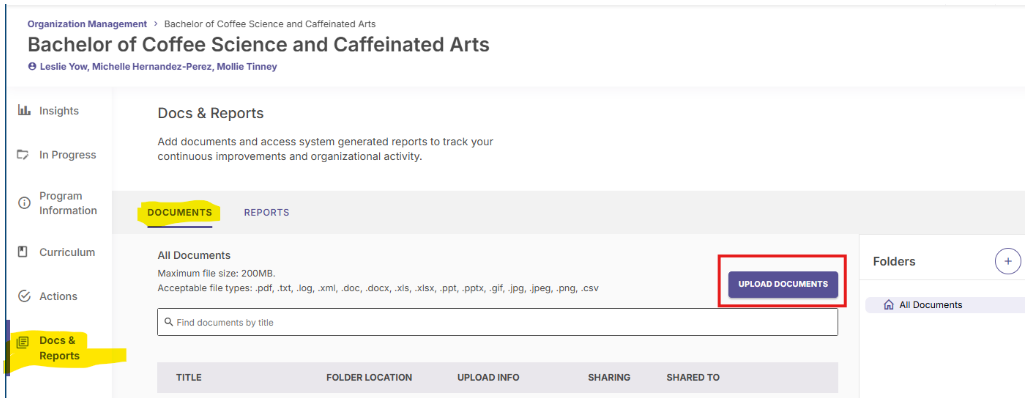
- **Edit**: Use to make changes that do not impact learning expectations (e.g., correct grammatical errors).
- **Revise**: Use to make changes that impact learning expectations, but do not change the overall meaning of the outcome (e.g., update the verb to increase or decrease Bloom taxonomy level).
- **Archive**: Use to remove a learning outcome that the program will no longer measure.

Required Actions

1. Select '*Manage Outcomes*'.
2. Select '*Learning Outcomes*' or '*Outputs*'.
3. To edit: Select the ellipsis to the right of the learning outcome to open editing options. Make a selection.
4. To create a new outcome: Select '*Create New Outcome*'
5. Select '*Done*' on the top-right corner to save all your changes.

Curriculum Map/s

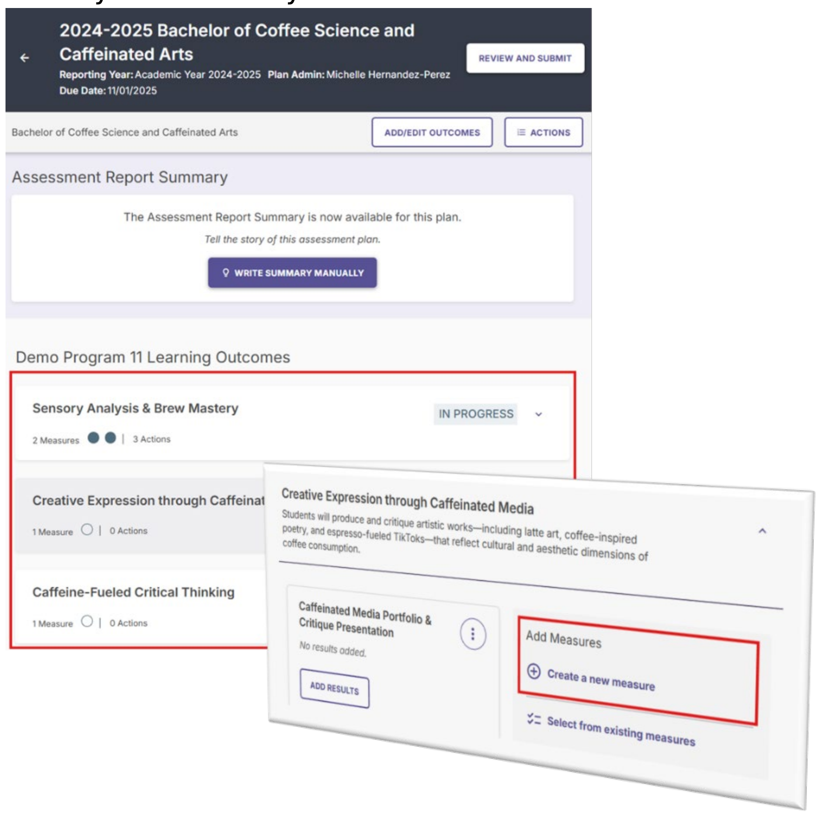
Location	YourProgram > Docs & Reports
Tab	Documents
Provides Reviewer	Reviewers do not see this section.



Description	This section can be used to store internal documents. Reviewers do not see these documents in the annual reports unless they are added to the specific reports. However, this section will allow you to access general documents quickly. Each report will have areas for documents that only apply to that year's report. OIE has uploaded a copy of the most recent curriculum map/s your program had uploaded into Taskstream for reference. The P&SS curriculum map feature is limited and expanded instructions will be added during Fall 2026. The most useful solution is to upload your own file/s that tell the story of how your curriculum progressively guides students to master knowledge, skills, and attitudes. Please add a year to the title of your curriculum map to help track changes. If your program has multiple concentrations with multiple courses, a curriculum map for each concentration may be more useful. Instructions on how to organize your curriculum map/s can be found in the OIE Toolkit.
Required Actions	1. Review any files added to this section. Remove any outdated files. 2. Select '*Upload Documents*' to search for documents to add.

Adding Measures

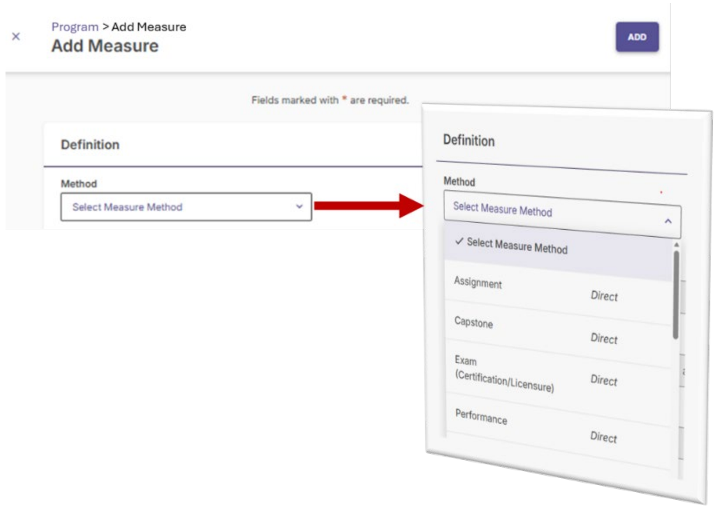
Location	YourProgram > Program Information
Tab	Outcomes
Provides Reviewer	A description of the method followed to gather student data to help reviewers determine validity and reliability.



Description	This section lists all program learning outcomes, including how many measures and actions have already been added to each PLO.
Required Actions	1. Select the appropriate learning outcome. 2. Select '*Create a New Measure*'.

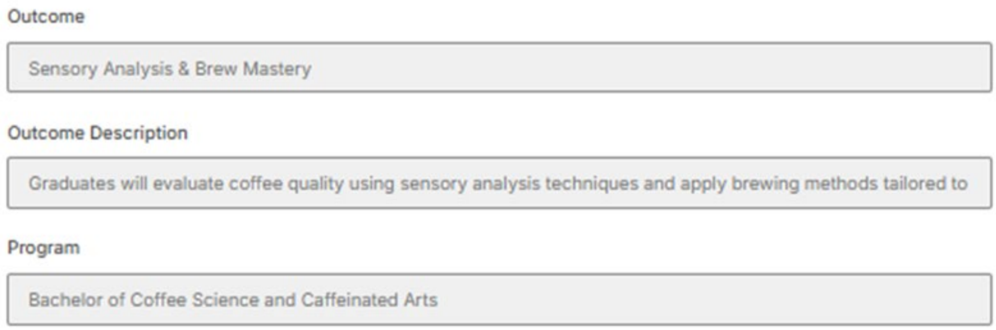
Note: The measures should not be changed each cycle and should not include sample size or results. All measures should be part of the report, regardless of being scheduled for assessment for that cycle. Measures are usually added only once every few years.

Location	YourProgram > Program Information > Add Measure
Tab	Method
Provides Reviewer	Brief description of the measure



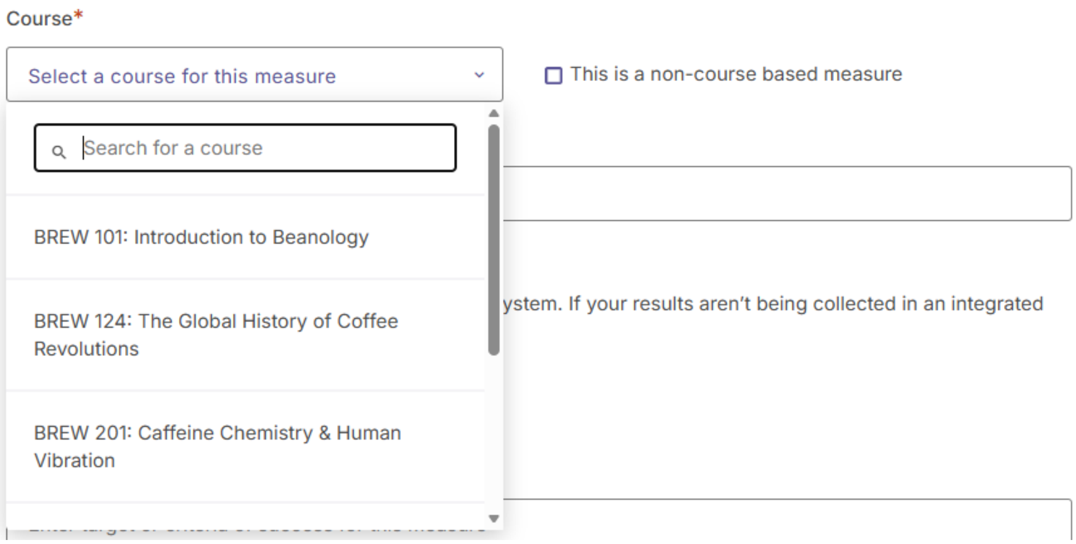
Description	Selecting the Method opens a pop-up window listing different types of methods. The methods show a tentative classification as direct or indirect measures. However, the actual classification depends on the results collected. Please read Selecting Assessment Measures for additional information. **The Admin will complete this section once the measures and results have been completed.**
Required Actions	Leave blank. For Admin use only.

Location	YourProgram > Program Information > Add Measure
Tab	Outcome, Outcome Description, Program
Provides Reviewer	Not seen by the reviewer.



Description	This section is filled automatically. It ties the results from the measure to the outcome in the final report.
Required Actions	No actions required.

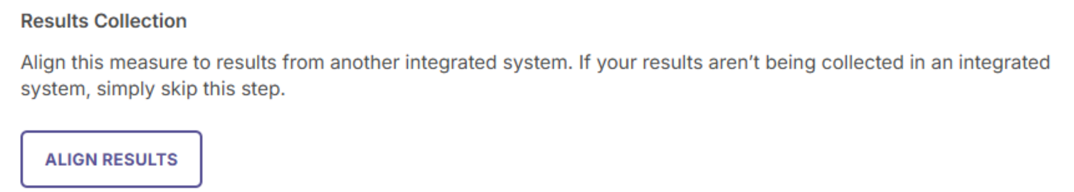
Location	YourProgram > Program Information > Add Measure
Tab	Course
Provides Reviewer	Shows the reviewer that the measure has a consistent location in the curriculum, indicating curriculum management and faculty consensus.



Description	Selecting the drop-down menu will show a list of courses associated with the program. The courses will be entered in Phase 2 of the transition to Planning & Self-Study in fall 2026. Note: This tab is not available until courses have been added by the administrators.
Required Actions	1. Select the course where the measure is used for assessment or select ‘*This is a non-course based measure.*’

Location	YourProgram > Program Information > Add Measure
Tab	Title
Provides Reviewer	Descriptive title that allows the reviewer to track the measure in other parts of the report.

Description	Titles can be up to 255 characters. Use a naming convention that allows tracking the measure in other parts of the report. Include: **PLO number + Measure number + Descriptive title**
Required Actions	1. Type in a title for the measure.

Location	YourProgram > Program Information > Add Measure
Tab	Results Collection
	
Description	This section is not available at the University of Alabama.
Required Actions	No actions required.

Location	YourProgram > Program Information > Add Measure
Tab	Target
Provides Reviewer	Indicates the program faculty have reached consensus on meaningful standards students are held to.

Target

Target: 85% of students will score 80% or higher on the test.

Rationale: 80% or higher on the test by at least 85% of the students demonstrates to our accrediting body, employers, and students that the program maintains high academic standards and graduates are well prepared. The faculty reached consensus on this expectation in May 2023.

For example, 80% of the students will achieve a score of 3 or above.

Description

The expectation for student achievement is used later to compare the results against it. It determines prioritization of curricular improvements. This section needs two parts to be complete:

Target: The expectation for student achievement must be in relation to the PLO and the measure (e.g., rubric used). Please read Setting Clear Expectations for Student Achievement for additional information.

The format includes a statement about the percent of students from the sample and a statement about level of performance:

___% of the students will perform at ___ level

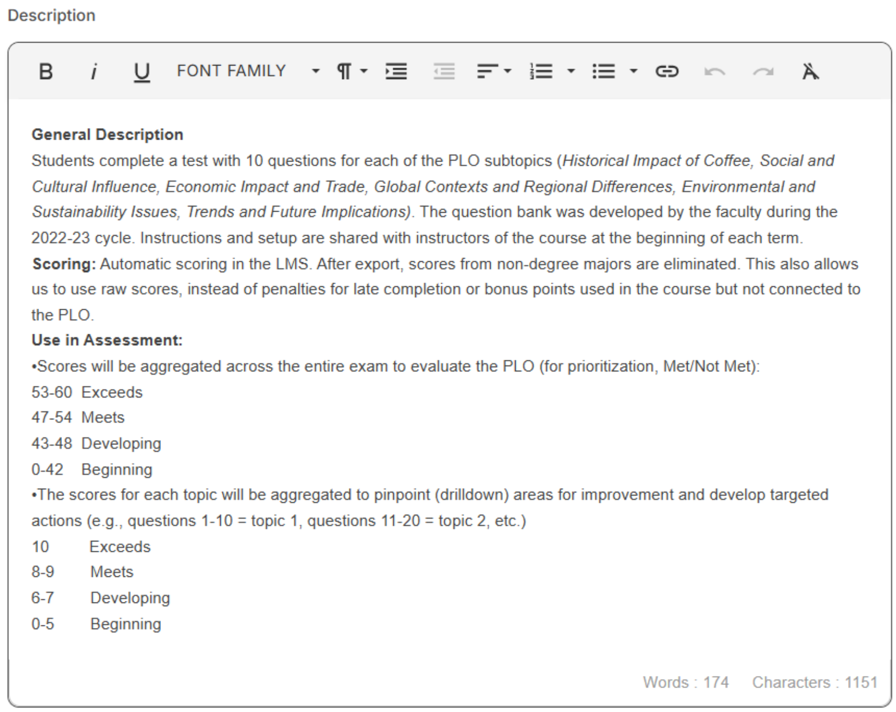
Each measure has one target (Each target requires a separate result area later in the report).

Rationale: The expectation for student achievement also includes a rationale that explains why the target is relevant to the program.

Required Actions

1. Type in '*Target*' followed by the expectation for student achievement.
2. Type in '*Rationale*' followed by the explanation about why the target is relevant to the program.

Location	YourProgram > Program Information > Add Measure
Tab	Description
Provides Reviewer	Allows the reviewer to determine if the measure is appropriate, valid, replicable, and reliable for the PLO. Shows faculty intentionality and rigor.


Description

B i U FONT FAMILY

General Description
Students complete a test with 10 questions for each of the PLO subtopics (*Historical Impact of Coffee, Social and Cultural Influence, Economic Impact and Trade, Global Contexts and Regional Differences, Environmental and Sustainability Issues, Trends and Future Implications*). The question bank was developed by the faculty during the 2022-23 cycle. Instructions and setup are shared with instructors of the course at the beginning of each term.
Scoring: Automatic scoring in the LMS. After export, scores from non-degree majors are eliminated. This also allows us to use raw scores, instead of penalties for late completion or bonus points used in the course but not connected to the PLO.
Use in Assessment:
•Scores will be aggregated across the entire exam to evaluate the PLO (for prioritization, Met/Not Met):
53-60 Exceeds
47-54 Meets
43-48 Developing
0-42 Beginning
•The scores for each topic will be aggregated to pinpoint (drilldown) areas for improvement and develop targeted actions (e.g., questions 1-10 = topic 1, questions 11-20 = topic 2, etc.)
10 Exceeds
8-9 Meets
6-7 Developing
0-5 Beginning

Words : 174 Characters : 1151

Description

This section explains how the measure is applied consistently across cycles. Do not include current-year results or sample size.

Write with **specificity and brevity** to show appropriateness, validity, replicability, and reliability. Add detailed descriptions in attachments for future coordinators. Formatting is allowed (see screenshot), but **do not include links**.

Components:

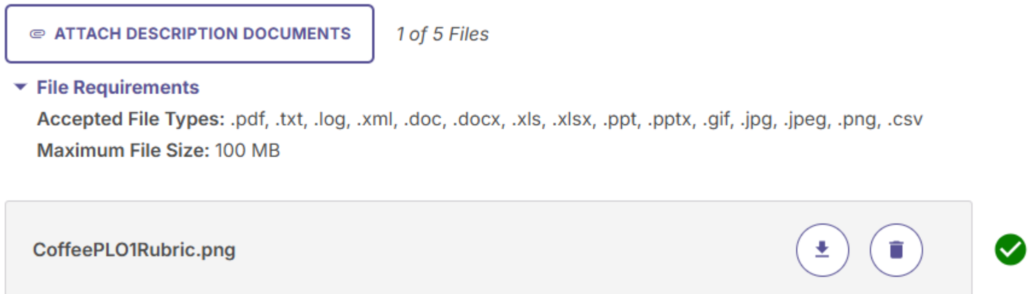
- **General Description:** What students complete and how instructors manage the activity.
- **Scoring:** How student work is scored. If using a rubric, describe it and attach in the next section.
- **Use in Assessment:** How results are analyzed for achievement (Met/Not Met) and curriculum improvement (targeted actions).

IMPORTANT: Scoring and Use in Assessment must align with the expectations of achievement and results. For example, if expectations use a total score, scoring cannot use letter grades. Results must match the stated expectations.

Required Actions

1. Use the [template] to complete this section.
2. Copy/paste into the Description area.

Location	YourProgram > Program Information > Add Measure
Tab	Attach Description Documents
Provides Reviewer	Allows the reviewer to review the rubrics or sample instructions provided to students and instructors for validity and reliability.



Description

The system allows assessment coordinators to add up to 5 files about the measures (not results).

The recommended format is .pdf, though others are acceptable (see screenshot).

Upload files by selecting *Attach Description Documents*.

Once the files are attached, they will be listed at the bottom. You will have the option to download the file from the system (useful for other users in the program) or delete the file.

Use descriptive titles for attachments:

Program abbreviation + PLO# + Type of document + Year Started

Useful Attachments:

- Rubric with the components for the pertinent PLO only (not all PLOs).
- Activity instructions students receive
- Longer method descriptions shared with faculty

Do Not Attach:

- Student work with identifiers in them
- Rubrics for all PLOs in one packet

Required Actions

Note: Attachments are not necessary, but are useful.

1. Use descriptive titles for attachments.
2. Upload files by selecting *Attach Description Documents*.
3. Keep obsolete files for no more than 5 years. Replace '*Year Started*' with '*Inactive*'
4. Delete obsolete files that have not been used for more than 5 years.

Location	YourProgram > Program Information > Add Measure
Tab	Add

Description

Review the content for:

- ☐ Method – Leave blank
- ☐ Course – List a course or be marked as non-course based
- ☐ Title – Descriptive title that uses naming convention
- ☐ Target – Expectation of achievement that follows the format <u>and</u> rationale
- ☐ Description – Content copied from the filled template
- ☐ Attach Description Documents – If used, title follows naming convention

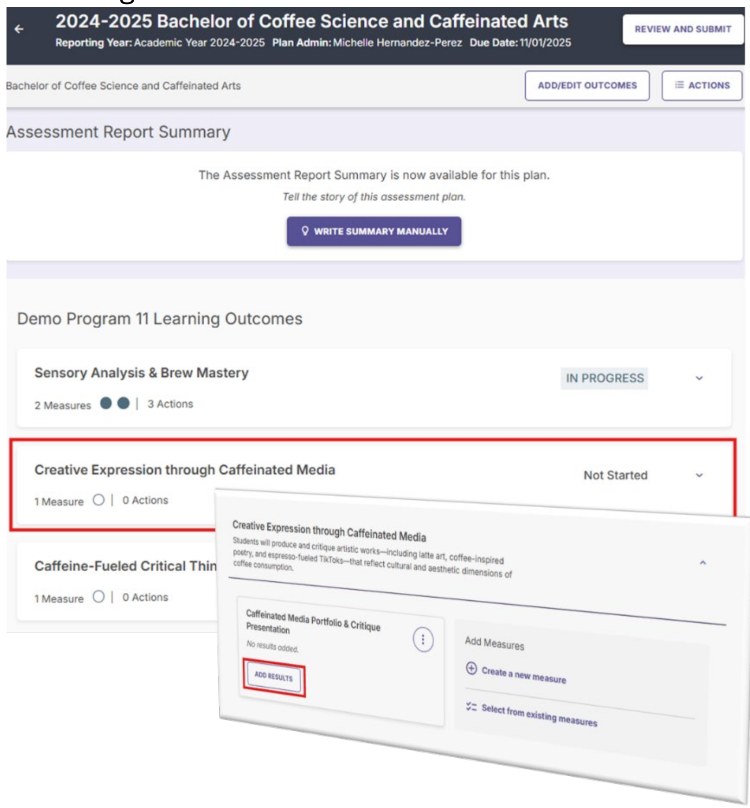
Required Actions

1. Select *ADD* on the top-right corner of the page to finalize adding the measure.

Adding Results

The results can be added from within the individual measures listed for each PLO.

Location YourProgram > In Progress > ADCLR



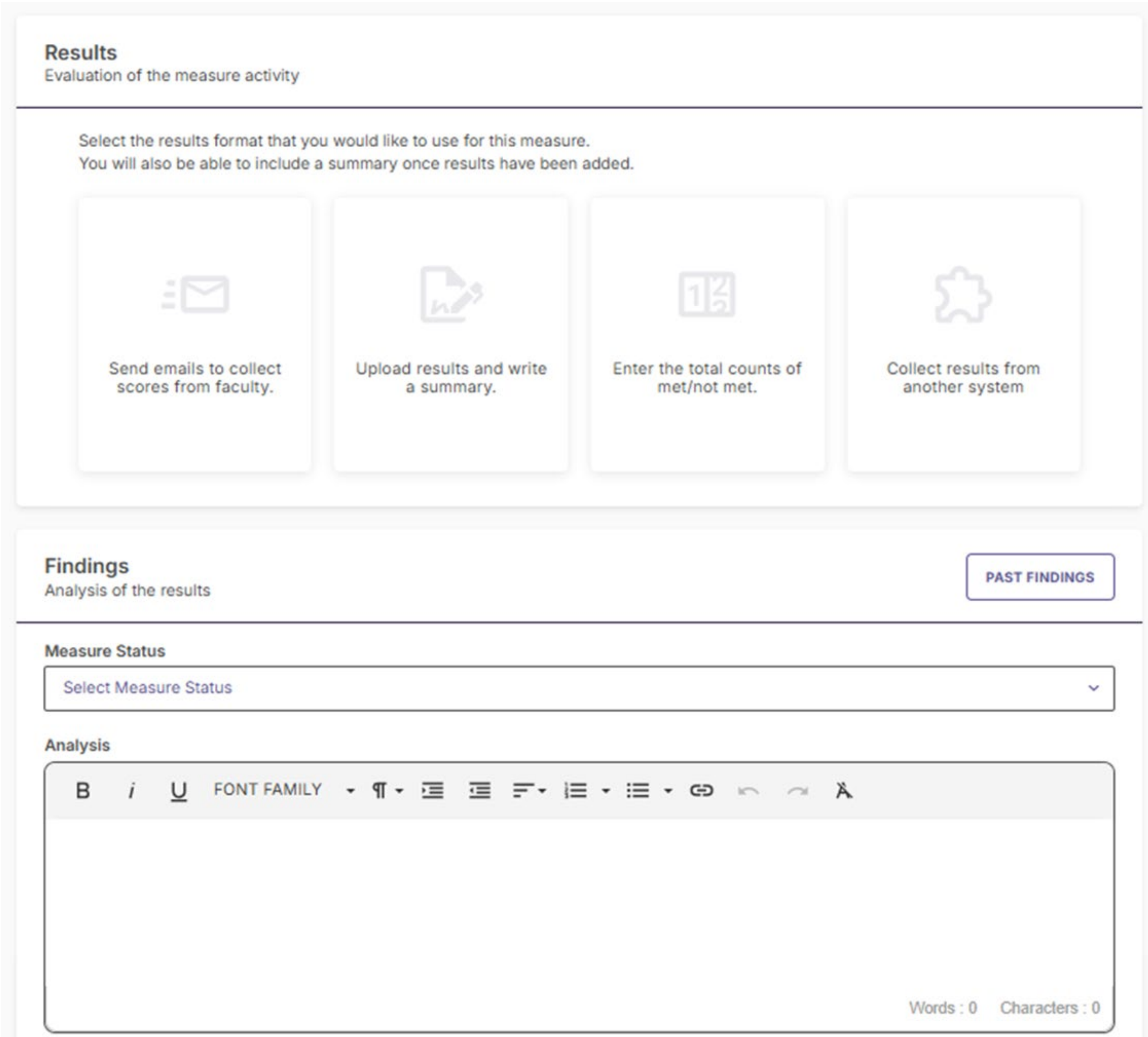
Description This section lists all program learning outcomes, including how many measures and actions have already been added to each PLO.

Required Actions

1. Select the appropriate learning outcome.
2. Select *Add Results*.

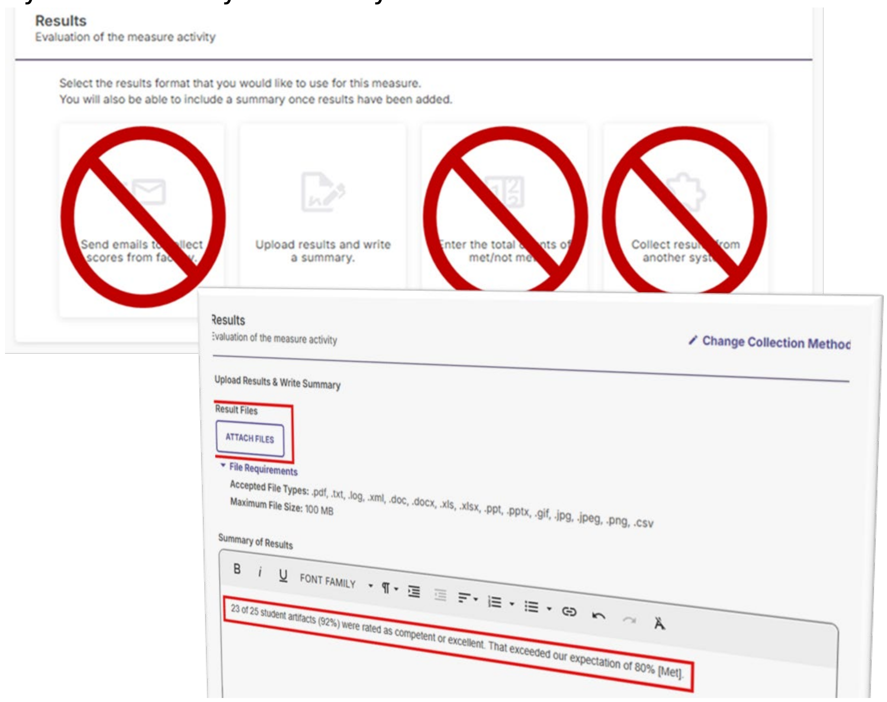
Note: The measures should not be changed each cycle and should not include sample size or results. All measures should be part of the report, regardless of being scheduled for assessment for that cycle.

Scroll past the measure to reach the Results area.



View of the entire Results area.

Location	YourProgram > In Progress > ADCLR
Tab	Results
Provides Reviewer	Indicates curriculum decisions are based on expectations of achievement previously decided on by the faculty.



Description

The Results area is a one-to-two sentence summary of the results. It includes the sample size, the number of students that met the expectation of achievement (target), and a conclusion about the expectation of achievement. If your expectation of achievement has multiple parts, write results for each.

___(count of those that met) of ___ (sample size) student artifacts (___%) were rated as ___. That exceeded our expectation of ___% [Met].

This section also allows you to add results files.

- Do not include any information that could be used to identify the students.
- Do not include links.

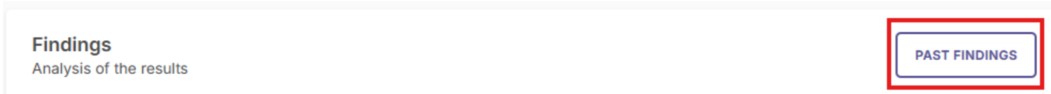
Useful attachments:

- Trend analysis of results over the last 3-5 years.
- Results by subtopics/rubric components.
- In-depth discussion (e.g., emails, minutes) of results by faculty.

Required Actions

1. Select '*Upload results and write a summary.*' (top image). This will open the Results area.
2. Select '*Attach Files*' to add a file (optional but very useful).
3. Type in the 1-2 sentence summary of the results in terms of the expectation of achievement.

Location	YourProgram > In Progress > ADCLR
Tab	Past Findings
Provides Reviewer	Not seen by the reviewer.



Description	Planning & Self-Study will give you access to previous findings for the measure. This is our first year, so no previous findings are available.
Required Actions	No actions required.

Location	YourProgram > In Progress > ADCLR
Tab	Measure Status
Provides Reviewer	Prioritization status. Reviewers will seek measures marked as ‘*Not Met’* for evidence of curriculum improvement initiatives. All programs are expected to have at least one curriculum improvement initiative, and this is the most obvious sign of where to find them. 
Description	Use as follows: • Met: The results align with the expectation of achievement. • Not Met: The results fall short of the expectation of achievement, even if by a few decimals. • Not Met: If there are multiple expectations of achievement for one measure and one or more fell short of meeting the expectations. **Note:** Since reviewers are interested in continuous improvement, the value of ‘*Met*’ only indicates to them that your program probably did not create an initiative for improvement for that outcome. They do not use ‘*Met*’ as a metric of the value of the program.
Required Actions	1. Select ‘*Met*’ or ‘*Not Met*’ from the dropdown menu.

Location	YourProgram > In Progress > ADCLR
Tab	Analysis
Provides Reviewer	Allows the reviewer to determine how faculty make data-based decisions about the curriculum.

Description

Whereas the *Results* section helped prioritize PLOs, the *Analysis* area helps target improvements to the curriculum based on data and resources.

Write with specificity and brevity to show how the overall results of the measure were further analyzed to track student performance on specific, relevant factors (e.g., subtopics, modality). Add detailed discussions or analysis in the Attachment area in the Results section. Formatting is allowed, but **do not include links**.

Components:

- **Drill-Down:** Break-down the data by topics and/or modality that lead to a better understanding of the effect of the curriculum on student learning.
- **Faculty Observations:** If available, include non-data-based faculty observations that inform the context of student learning. These include: weather events, software issues, etc. Note: Stating that students did not put effort on the task is interpreted by reviewers as faculty are not interested in student learning.
- **Discussion:** Conclusion about which current factors faculty believe are affecting student learning.

Note: If the measure did not meet the expectation for achievement but no action for improvement was developed, briefly explain why the faculty decided to prioritize another PLO. Prioritization is good curriculum management and shows attention to data and available resources.

IMPORTANT: Actions for improvement must align with the factors identified in the *Analysis* area. For example:

- **Factor identified:** Data show weak performance on *argumentation*
- **Misaligned action:** Capstone added a grammar module

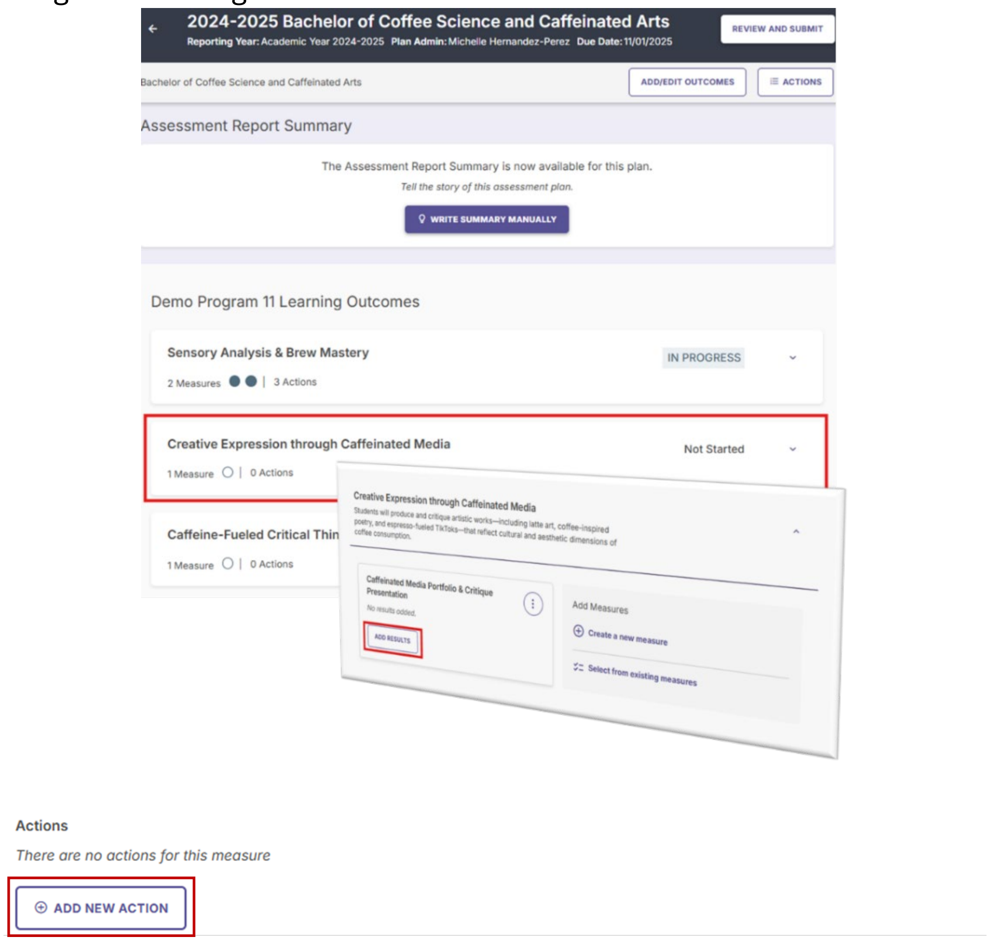
Required Actions

1. Use the **template** to complete this section.
2. Copy/paste into the *Analysis* area.

Adding Actions

The actions can be added from within the individual measures listed for each PLO.

Location YourProgram > In Progress > ADCLR



Description Only add complete actions that follow the **template**.
Read the **Appendix: More About Actions** for a list of actions and how they add value to the report.

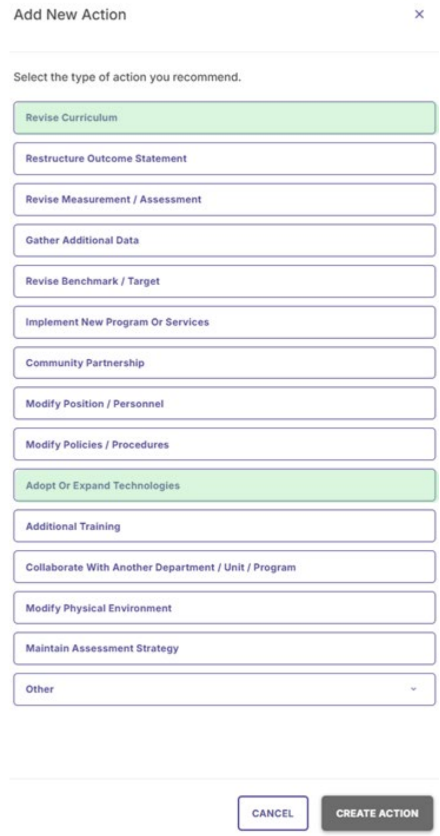
The following are not considered actions:

- **"We will continue to …":** This indicates that there is no change to the curriculum or the process. There is no need to add the statement into an action.
- **"We will meet to discuss the results …":** This indicates the report is incomplete. Instead of submitting this statement, request an extension of a month to have time to meet, discuss the results, and develop actions with the faculty.

Required Actions

1. Select the appropriate learning outcome.
2. Select *Add Results*.
3. Scroll down to the Actions area.
4. Select *Add New Action*.

Location	YourProgram > In Progress > ADCLR
Tab	Add New Action
Provides Reviewer	Summarizes the type of action: learning or process.



Description

Planning & Self-Study provides a list of action categories to choose from. Note that reviewers are looking for actions that directly impact student learning. Only two from the list meet this requirement and are counted towards items XII and XIV in the Feedback Rubric:

- **Revise Curriculum**
- **Adopt or Expand Technologies**

The other possible actions are categorized as process improvement.

Do not combine actions. Develop a action for each change that requires a different set of steps.

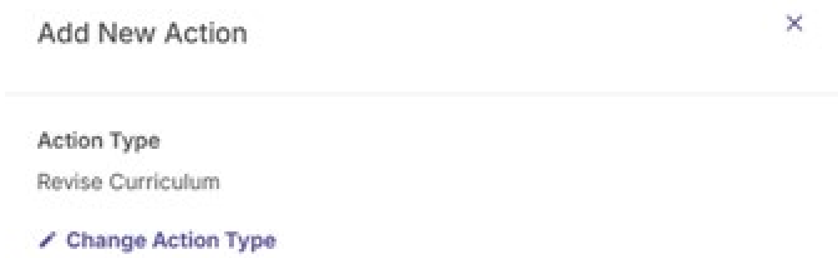
IMPORTANT: Actions for improvement must align with the factors identified in the *Analysis* area. For example:

- **Factor identified:** Data show weak performance on *argumentation*
- **Misaligned action:** Capstone added a grammar module

Required Actions

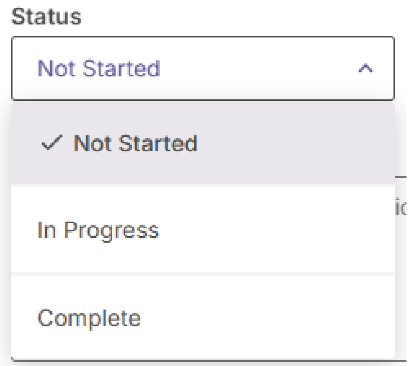
1. Select the type of action developed.
2. Select '*Create Action'* on the bottom-right.

Location	YourProgram > In Progress > ADCLR
Tab	Action Type
Provides Reviewer	This area corroborates the selection you made in the previous screen. It is visible to reviewers.



Description	Automatically-filled section that corroborates your selection in the previous screen.
Required Actions	No action necessary. Select *Change Action Type* if the wrong type was selected previously.

Location	YourProgram > In Progress > ADCLR
Tab	Status
Provides Reviewer	Provides an update on the action status.



Description

Improvement actions move through a **life cycle**, just like any intentional project. Each status label—**Not Started**, **In Progress**, and **Complete**—marks a specific stage in that life cycle. These labels help ensure that every action is planned, implemented, and evaluated for effectiveness.

- **Not Started:** 'Not Started' does *not* mean "we haven't thought about it." It means the planning phase is **fully complete.** If the elements in the Template are **not** in place, the action should *not* be submitted at all.
  - **Think of this stage as the blueprint of the action—fully drawn, approved, and ready to build.**

- **In Progress:** Label an action **In Progress** only when the program has **moved beyond planning** and has begun to carry out the action. Examples of what counts as '*In Progress*' are The new assignment has been added to the course, The new workshop or training has been offered, etc. **'In Progress' should reflect observable implementation—not intention, discussion, or preparation.** This is the *active* part of the life cycle, where the work is happening and the action is influencing teaching, learning, or support structures.

- **Complete:** An action reaches **Complete** status only after:
  - The action has been implemented for **one or two full cycles**, *and*
  - The program has **collected data** to evaluate whether the action was effective.

  This means the program can now answer: *Did the action work? Did it improve the learning outcome or factor identified? What evidence supports this conclusion?* Completion is not simply finishing the activity—it is **finishing the activity and then evaluating its impact** with evidence.

Required Actions

1. Select the current status of the action.

Location	YourProgram > In Progress > ADCLR
Tab	Action Description
Provides Reviewer	Provides evidence of data-based, organized, faculty efforts to continuously improve the curriculum to meet the changing needs of the students.

Description

This section describes the action plan as a formal project and includes:

- A clear improvement action linked to the factor identified in the data
- Rationale that explains why the action is expected to have an effect on the factor identified as problematic
- Defined steps for carrying out the action
- Assigned roles and responsibilities (who will do what)
- A timeline with milestones
- A deadline for completion
- Resources identified (if needed)
    - Faculty lines are a budget request. There is a separate section for that outside the action description.

If these elements are **not** in place, the action should *not* be submitted at all.

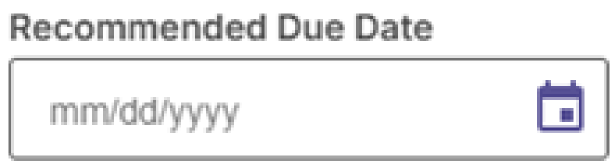
IMPORTANT: Actions for improvement must align with the factors identified in the *Analysis* area. For example:

- **Factor identified:** Data show weak performance on *argumentation*
- **Misaligned action:** Capstone added a grammar module

Required Actions

1. Use the **template** to complete this section.
2. Copy/paste into the *Action Description* area.

Location	YourProgram > In Progress > ADCLR
Tab	Recommended Due Date
Provides Reviewer	Allows the reviewer to track progression and have clear expectations about when the action will be implemented (not evaluated).



Description

Use the Recommended Due Date to indicate when implementation of the improvement action will begin.

For example, if the timeline is:

- August 15–30, 2027: Faculty survey collects their feedback on the existing Capstone instructions to identify areas needing clearer descriptions and examples
- September 1–October 15, 2027: Small faculty workgroup draft more descriptive, student-friendly instructions based on the results of the survey.
- November 1-15, 2027: Revisions are shared with all faculty in a second survey. Final edits are made based on received feedback.
- December 1, 2027: Upcoming Capstone instructors receive the final version of the instructions.
- **January 8, 2028**: Revised instructions are adopted across all Capstone sections.
- May 1, 2029: Capstone instructors submit the data collected for this measure during that term to evaluate the effectiveness of the action.
- August 15-30, 2029: Faculty discuss the results of the action and their input is added to the report for that cycle.

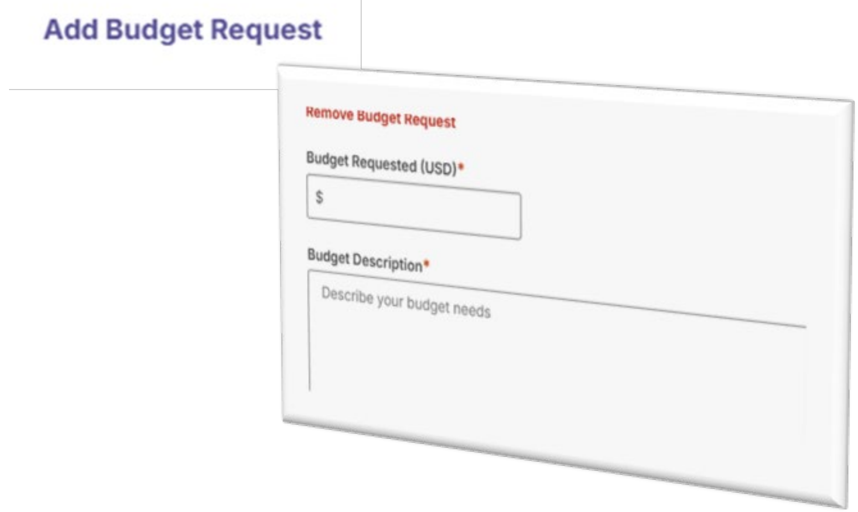
Then, the date to be entered into the Recommended Due Date section would be: January 8, 2028

Note that evaluation of the action's effectiveness will occur during the next one or two assessment cycles, as appropriate.

Required Actions

1. Enter the date when the action is expected to be implemented. This is usually the first date of the term.

Location	YourProgram > In Progress > ADCLR
Tab	Budget Request
Provides Reviewer	Demonstrates the faculty are aware of the resources available.



Description

Include actions that require a budget request only if they have already been approved. The report is not used to make the request, but to inform reviewers about the approved actions that will be completed.

Include in the description:

- Approval date
- Person and Position Approving the Budget

IMPORTANT: Actions for improvement must align with the factors identified in the *Analysis* area. For example:

- **Factor identified:** Data show weak performance on *argumentation*
- **Misaligned action:** Capstone added a grammar module

Required Actions

If you have an action that requires additional budget:

1. Select '*Add Budget Request*' at the bottom of the Action area
2. Enter the amount in the Budget Requested section
3. Enter the Budget Description

Location	YourProgram > In Progress > ADCLR
Tab	Create Action

Description

Review the content for:

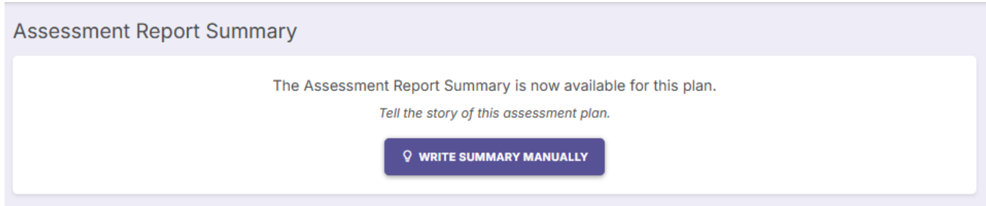
- ☐ Action Type – It is appropriate for the action
- ☐ Status – Reflects the current stage in the life-cycle of the action
- ☐ Action Description – Content copied from the filled **template**
- ☐ Recommended Due Date – It is feasible given the current program resources
- ☐ Budget Request – It is feasible given the current program resources
- ☐ Budget Description – It has been discussed and approved

Required Actions

1. Select *Create Action* on the top-right corner of the page to finalize adding the measure.

Adding an Assessment Report Summary

Location	YourProgram > In Progress > ADCLR
Tab	Write Summary Manually
Provides Reviewer	Gives the reviewer a brief explanation of how the program is structured.



Description

Most programs have a progressive curriculum, where students learn basic skills in the initial courses which prepare them to learn advanced skills in later courses. However, not all programs have this structure. To help reviewers read your report from the appropriate perspective, please select and add one of the statements below.

- This program is organized as a progressive curriculum: introductory courses build essential skills that scaffold into more advanced competencies in upper-level courses.
- This program is not structured as a progressive curriculum. Its courses function as complementary but non-sequential components that support the program's learning goals.
- This program follows an individualized curriculum model. An expert works with each student to design an individualized plan of study and develop personalized learning outcomes appropriate to their goals.

IMPORTANT: This section is only available once results for at least one measure have been added.

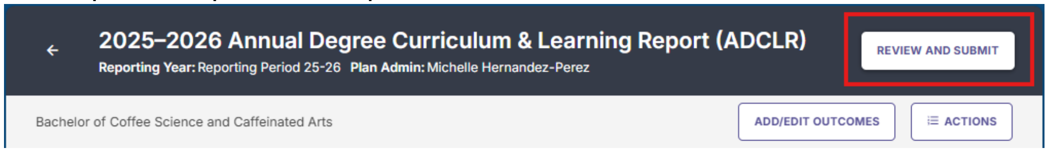
Required Actions

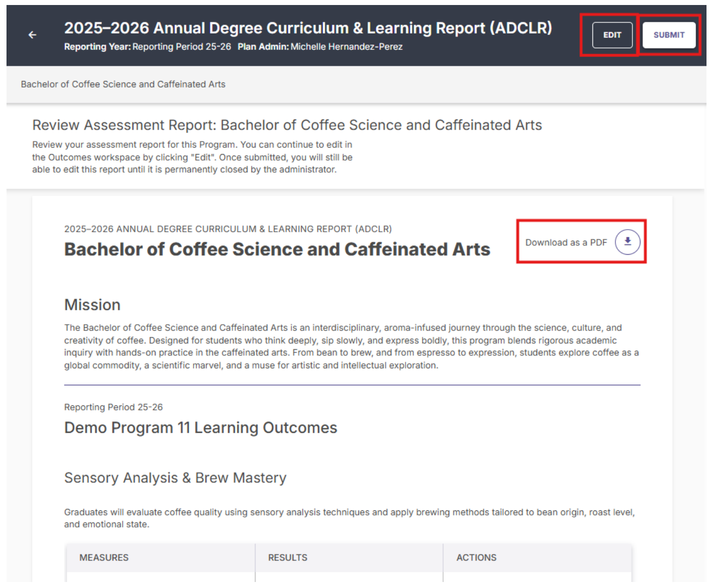
If you have an action that requires additional budget:

1. Select '*Write Summary Manually*'
2. Copy/Paste one of the options above at the top of the text area.
3. Add/Edit as necessary to provide a clear perspective of your program.
4. Select 'Save' at the top.

Reviewing and Submitting the Report

Location	YourProgram > In Progress > ADCLR
Tab	Review and Submit
Provides Reviewer	Final step to complete the report.





Description	The Review and Submit section shows the information from the outcomes within the format of the report. P&SS reports include the mission and the Assessment Report Summary at the top of the report. These are followed by the outcomes. The outcome section is organized into three columns. By showing the measures next to the results followed by the actions, the reviewer can see which results were obtained from specific measures, and tie actions to specific findings. If the program has included outputs, these appear at the end of the report. This organization allows reviewers to focus on the outcomes, which is the content they are interested on.
Required Actions	If you have an action that requires additional budget: 1. Select '*Review and Submit*' on the top-right corner to access the preview. 2. Select 'Edit' to return to editing mode, or select 'Submit' to send the report to OIE. 3. Optional: Select 'Download as a PDF' to download the report.

Using the Templates

This section provides three copy-ready templates—the **Measure Template**, **Analysis Template**, and **Action Template**—that outline all required headers and information needed for the Planning & Self-Study assessment report. These templates are designed to help you structure your writing clearly and consistently, ensuring you include every element reviewers expect to see.

Each template functions as a **fillable guide**: you will enter your program's information directly into the template and then **copy and paste the completed template into the corresponding section of the Planning & Self-Study report**. Using the templates ensures standardization across programs, reduces guesswork about what belongs in each section, and makes it easier for external reviewers to understand and evaluate your assessment process.

Feel free to use the templates as both drafting tools and quality checks. Once completed, they provide a clean, organized snapshot of your Measures, Results, and Actions—ready for direct submission in the platform.

Measure Template

When writing your assessment measures, think of the template as an opportunity to tell a clear, intentional story for external reviewers. Reviewers are looking for evidence that our measures are valid, reliable, and replicable, and that the results meaningfully support curriculum improvement. By describing how the measure aligns to the PLO, how it is scored consistently, and how data is collected and analyzed in a repeatable way, you help reviewers—and future faculty—see the rigor behind our process. The more clearly we document *what we do and why we do it*, the more confidently reviewers can affirm that our assessments provide trustworthy, actionable information for improving student learning.

Copy/paste the content from each box into the same Description tab in the Measure section.

Measure Overview

Student Task / Activity Description: What students complete (assignment, exam question set, performance, etc.), including conditions of completion (in class, online, timed, group/individual, etc.).
Purpose & Alignment: Brief justification for why this measure is appropriate for the PLO.

1. Measure Overview **Student Task/Activity Description:** Text here... **Purpose and Alignment:** Text here...

Construct Validity

Subskills: List subskills evaluated by this measure that build up to the PLO (e.g., thesis clarity, data interpretation, ethical reasoning).
Irrelevant Factors: Describe steps taken to ensure the measure is not influenced by irrelevant factors (e.g., eliminating bonus points and late deductions from score) or discuss irrelevant factors that the faculty is conscious may be affecting the data but have not been eliminated yet.

2. Construct Validity **Subskills** **1.** Text here... **2.** Text here... **3.** Text here... **Irrelevant Factors:** Text here...

Reliability

Scoring Method: How the student work is scored (automated scoring, rubric, faculty review committee, dual scoring, etc.).
Procedures Ensuring Consistency Across Faculty and Cycles

- Calibration sessions, norming meetings, anchor papers/examples.
- Rules for resolving scorer disagreement (e.g., >1 category difference triggers discussion and rescoring).
- How scoring training is documented so new faculty can replicate it.

3. **Reliability: How Scoring is Kept Consistent Across Faculty and Cycles**
   Scoring Method: Text here...

   Procedures Ensuring Consistency Across Faculty and Cycles: Text here...

Replicability: Data Collection

Data Collection Protocol: *Clear, step-by-step instructions for how faculty gather student work/data so the process can be repeated each cycle. Include numbered steps that a new assessment coordinator could follow.*

- When the assessment occurs (semester, week, milestone).
- Which student population is sampled (course numbers, sections, modality).
- Inclusion/exclusion criteria for samples. How non-degree majors data is removed.
- How student work is collected, stored, and de-identified.
- Tools used (LMS exports, survey system, rubrics, etc.).

4. **Replicability: Data Collection**
   Data Collection Protocol: Text here...
   1. Text here...
   2. Text here...

Replicability: Data Analysis

Analysis Steps: *Explicit instructions so that future coordinators can analyze the results in the same way.*

- How subskills or rubric categories are analyzed. Again, list **structured steps** for repeatability.
- How data is disaggregated (modality, course section, demographic groups if appropriate, first-attempt vs. repeat attempts, etc.).
- How reliability checks are conducted (e.g., inter-rater agreement calculations).
- Required software/tools (Excel templates, LMS report generator, Power BI dashboard).

5. **Replicability: Data Analysis Process**
   Analysis Steps: Text here...
   1. Text here...
   2. Text here...

Feedback Loop

How often the results will be reported.

6. **Feedback Loop:** Text here ...

Measure Example 1: No Frills

1. Measure Overview

Student Task/Activity Description: Students complete a 1,000-word data-analysis memo in an upper-division course. Working individually, they interpret a provided dataset, identify key patterns, and communicate findings in a professional memo format. The memo is completed over two weeks and submitted online.

Purpose and Alignment: This measure assesses PLO 3: *Students will analyze quantitative information to draw evidence-based conclusions*. The assignment directly elicits students' ability to interpret data, apply analytical reasoning, and communicate results clearly.

2. Construct Validity

Subskills

1. Accuracy of data interpretation
2. Appropriateness of analytical methods
3. Clarity of explanation and justification of conclusions

Irrelevant Factors: The rubric excludes mechanics (grammar, formatting) from scoring to prevent writing quality from influencing evaluation of analytical reasoning. Late penalties and extra credit are removed before analysis.

3. Reliability: How Scoring Is Kept Consistent Across Faculty and Cycles

Scoring Method: Faculty score memos using a 3-category analytic rubric (Interpretation, Methods, Conclusions).

Procedures Ensuring Consistency Across Faculty and Cycles: Each cycle begins with a 45-minute calibration session using two anchor memos. Scorers discuss criteria and align expectations. Any score differences greater than one rubric level trigger a brief rescoring discussion. Calibration notes and anchor papers are stored in the assessment folder for future faculty.

4. Replicability: Data Collection

Data Collection Protocol:

1. Collect memos from all sections of Course XYZ offered in Fall (face-to-face and online).
2. Export student submissions from the LMS; remove non-majors using the department's major-code filter.
3. Save all files to the shared assessment drive in de-identified format (student names replaced with ID numbers).
4. Assign each scorer 20–25 memos using the randomized LMS export list.

5. Replicability: Data Analysis Process

Analysis Steps:

1. Enter rubric scores into the department's Excel analysis template and calculate subskill means and distribution levels.
2. Disaggregate by modality (online vs. in-person) and first-time vs. repeat-attempt students.
3. Run an inter-rater reliability check using percent agreement on 10% double-scored samples.
4. Summarize findings and generate charts using the built-in Excel dashboard.

6. Feedback Loop: Assessment results are shared at the department meeting each spring. Faculty document planned actions (e.g., earlier data-literacy scaffolding) and review changes the following fall to evaluate impact.

Measure Example 2: Expanding in the Attachments

1. Measure Overview
Student Task/Activity Description: Students complete a 20-item online critical-thinking quiz in Week 12. The quiz is timed (30 minutes) and drawn from a standardized internal test bank.
Purpose and Alignment: This measure assesses PLO 1: *Students evaluate arguments and evidence*. Items require students to identify assumptions and judge conclusion strength.

2. Construct Validity
Subskills
1. Fallacy identification
2. Evidence evaluation
3. Assessing conclusion validity

Irrelevant Factors: Items undergo readability checks and cultural-bias review. Late penalties and extra credit points are removed before analysis.

3. Reliability
Scoring Method: The LMS auto-scores all items using verified answer keys (see Attachment A: Test Bank Overview & Item Review Log).
Procedures Ensuring Consistency: Faculty conduct an annual 30-minute item-review meeting. All updates and sample decisions are documented in Attachment A.

4. Replicability: Data Collection
Data Collection Protocol:
1. Administer in Week 12 across all ABC sections.
2. Export scores and item-level data from LMS.
3. Remove non-majors and upload de-identified files using directions in Attachment B: Faculty Data Collection Guide.

5. Replicability: Data Analysis
Analysis Steps:
1. Import LMS export into the standard Excel file.
2. Analyze subskills by item cluster and disaggregate by section/modality.
3. Calculate KR-20 using the built-in formulas in Attachment B.

6. Feedback Loop: Findings are reviewed every two years in the spring retreat; action items are documented and re-checked the following cycle.

Measure Template: Empty

1. Measure Overview
Student Task/Activity Description: Text here ...
Purpose and Alignment: Text here ...

2. Construct Validity
Subskills
1. Text here ...
2. Text here ...
3. Text here ...

Irrelevant Factors: Text here ...

3. Reliability
Scoring Method: Text here ...
Procedures Ensuring Consistency: Text here ...

4. Replicability: Data Collection
Data Collection Protocol:
1. Text here ...
2. Text here ...
3. Text here ...

5. Replicability: Data Analysis
Analysis Steps:
1. Text here ...
2. Text here ...
3. Text here ...

6. Feedback Loop: Text here ...

Analysis Template

External reviewers focus on whether the Analysis section uses the measures consistently, aligns with the identified subskills, and organizes data in ways that reveal meaningful patterns such as learning gaps or trends across cycles. They look for faculty interpretations centered on curricular or instructional factors—not student attitudes—and will compare the factors identified here with the actions in the next section to ensure decisions are evidence-based. Strong analysis shows that the program is using its data intentionally to understand learning and guide improvement.

Copy/paste the content from each box into the same Analysis tab in the Findings section.

Subskill/ Modality/ Concentration Breakdown

Breakdown: Analyze results by the subskills, rubric components, or topic areas identified in the Measures section, noting which components met expectations and which fell below.
Trend Analysis: Compare current results with the previous three cycles to identify upward or downward trends. Present trends in a graph and reference it as an attachment.

1. **Subskill/ Modality/ Concentration Breakdown**
   Breakdown: Text here...

   Trend Analysis: Text here...

Faculty Observations (Contextual Factors)

Include only contextual factors that faculty could realistically address in later improvement actions. Focus on conditions that may have influenced student performance, such as technology issues, assignment changes, timing within the semester, or disruptions like weather or LMS outages. Observations about student behavior should be tied to instructional context (e.g., "Students had limited prior practice with data interpretation before this assignment").
Important Note: Avoid comments suggesting lack of student effort or motivation. Reviewers interpret these as a lack of faculty engagement with learning challenges, and—if included—they will expect corresponding actions and indirect measures aimed at improving student attitudes toward the field.

2. **Faculty Observations (Contextual Factors):** Text here...

Interpretation & Conclusions

Provide a brief, evidence-based statement identifying the most likely curricular or instructional factor contributing to lower performance framed as a hypothesis. Ground your interpretation in the drill-down data and contextual observations.

These results suggest students may need ___ because ___.

Note: Do not propose actions here. A separate section is dedicated to developing improvement actions based on these conclusions.

3. **Interpretation & Conclusion:** Text here...

Analysis Example 1: Expectations Not Met

The report had this statement in the results section: Of the 100 student presentations evaluated, 77% met or exceeded expectations. Not Met.

1. Subskill / Modality / Concentration Breakdown
Breakdown: Component-level results show strong performance in *Organization* (82%) and *Audience Engagement* (80%). Performance was moderate in *Content Development* (74%) and *Delivery* (72%). The lowest results were in *Clarity of Visual Aids* (68%), indicating this component fell below expectations relative to the others.
Trend Analysis: Comparison with the previous three cycles shows no meaningful upward or downward trends. Overall performance has remained stable: 76% met expectations in 2023–24, 78% in 2022–23, and 75% in 2021–22. Component-level patterns also remain consistent, with each subskill fluctuating no more than 2–3 percentage points across cycles. A simple trend chart is attached for reference.

2. Faculty Observations (Contextual Factors): Faculty noted that the written portion of the assignment and the oral presentation were due simultaneously, limiting the time students received feedback that could improve their oral performance. Faculty believe that requiring the written component earlier—and providing students feedback at least one week prior to the presentation—would better support preparation and clarity during delivery and visual aid development.

3. Interpretation & Conclusions: These results suggest students may need structured, earlier feedback on the written component because the timing of the assignment reduces opportunities to revise ideas, organize content, and develop clearer visual aids before presenting.

Analysis Example 2: Expectations Met and a Twist

The report had this statement in the results section: 84 of 100 student submissions (84%) met or exceeded expectations. Met.

1. Subskill / Modality / Concentration Breakdown
Breakdown: Component-level analysis shows strong performance in Identification of Key Issues (88%), Use of Evidence (86%), Reasoning (83%), and Conclusions (82%). However, Consideration of Alternative Perspectives was much lower at 62%, indicating a notable gap in students' ability to evaluate multiple viewpoints within the case study.
Trend Analysis: Results across the past three cycles show overall stability: 82% met expectations in 2023–24, 81% in 2022–23, and 83% in 2021–22. The same persistent pattern appears in the subskills—Consideration of Alternative Perspectives has remained between 60–65% across all cycles, while other components fluctuate within 2–4%. A chart summarizing this trend is attached.

2. Faculty Observations (Contextual Factors): Faculty observed that students rarely received structured opportunities earlier in the semester to practice evaluating competing arguments or alternative interpretations of a case. Most coursework emphasizes identifying the "correct" interpretation rather than exploring multiple perspectives. Faculty believe this limited scaffolding may contribute to consistently lower performance in the alternative-perspectives component.

3. Interpretation & Conclusions: These results suggest students may need earlier and more intentional practice examining multiple viewpoints because current coursework emphasizes singular interpretations, leaving students less prepared to evaluate alternatives in the case-study assignment.

However, faculty elected to prioritize PLO1 this cycle because the measure for that outcome did not meet expectations. An improvement action for this PLO will be developed in the next assessment cycle.

*Do not include a statement in the action section if the action will be created in the future.

Analysis Template: Empty

1. Subskill / Modality / Concentration Breakdown
Breakdown: Text here ...
Trend Analysis: Text here ...

2. Faculty Observations (Contextual Factors): Text here ...

3. Interpretation & Conclusions: Text here ....

Action Template

External reviewers expect the Improvement Action to be a direct, evidence-based response to the factor identified in the Analysis section. They look for actions that are concrete, well-designed, and feasible—clearly outlining steps, responsible roles, timelines, and any required resources. An action is a change to the curriculum or the process, not the continuation of what has been done previously. Actions should reflect faculty consensus and demonstrate thoughtful planning, not vague intentions such as “We will meet to discuss” or “We will continue to encourage.” If an action requires funding or administrative support, reviewers expect to see that this approval has already been secured. In short, reviewers want to see a clear, actionable plan that the program is committed to implementing and that is logically aligned with the identified area for improvement.

Copy/paste the content from each box into the same Action tab in the Findings section.

Improvement Action

Describe one clear, specific action directly linked to the factor identified in the Analysis section.
This should be a concrete change to curriculum, instruction, sequencing, scaffolding, or support—not a meeting, not a plan to make a plan, and not a vague intention. The action must be something faculty have agreed to implement and can realistically complete within the stated timeline.

1. **Improvement Action:** Text here...

Rationale

Briefly summarize how the action addresses the root cause identified in the Analysis.

2. **Rationale:** Text here...

First Cycle in Which the Action Appears

Indicate the academic year in which this action is first reported (e.g., 2024–25).

3. **First Cycle in Which the Action Appears:** Text here...

Defined Steps, Timeline, and Responsible Roles

List the specific steps needed to implement the action, when each step will occur, and who is responsible. Each step should be actionable, time-bound, and assigned to a person or role (e.g., “Course Coordinator,” “Faculty Team,” “Assessment Coordinator”). Avoid general statements without ownership or timelines.

4. **Defined Steps, Timeline, and Responsibility Roles** 1. Term Year – Responsible Role – Task 2. Term Year – Responsible Role – Task 3. Term Year – Responsible Role – Task

Resources Needed (If Applicable)

List only the resources truly required to implement this action—such as software, training, equipment, or other supports—and include them here only if they already have administrative approval. Any resource that requires additional funding, including new faculty lines or budgeted items, must be pre-approved by administration and documented in the appropriate section of this report.

5. **Resources:** Text here…

Action Example 1: Improving the Feedback Process

1. Improvement Action: Require students to submit their written outline and draft visual aids one week before the presentation so faculty can provide targeted feedback that improves clarity, organization, and visual design prior to final submission.

2. Rationale: Providing earlier feedback directly addresses the identified factor: students' visual aids lacked clarity because the written and oral components were due simultaneously, leaving no time for revision. Early review gives students structured support to refine visuals and better align them with their presentation content.

3. First Cycle in Which the Action Appears: 2025–26

4. Defined Steps, Timeline, and Responsible Roles

1. Summer 2025 – Course Coordinator revises assignment instructions to include the new early-submission requirement for outlines and draft visual aids.
2. August 2025 – Faculty Team reviews and approves the updated assignment prompt and grading expectations.
3. Weeks 3–4 of Fall 2025 – Instructors collect draft materials one week before presentations and provide structured feedback using a brief checklist aligned with the rubric.
4. End of Fall 2025 – Assessment Coordinator verifies that the new process was implemented and gathers faculty reflections for monitoring.
5. Fall 2026 – Data is collected to evaluate the action's impact on student performance.

5. Resources: None needed; existing faculty workload and LMS tools are sufficient for implementation.

Action Example 2: Improving the Curriculum

1. Improvement Action: Develop and implement a standardized, faculty-approved instructional module on evaluating alternative perspectives, and require its inclusion in all sections of Course ABC (online and in-person) before students complete the case-study assignment.

2. Rationale: Analysis showed that students consistently struggle with the “Consideration of Alternative Perspectives” rubric component due to limited practice earlier in the course. A shared module ensures all students receive explicit instruction, guided practice, and examples before completing the assignment, directly addressing the root cause of low performance.

3. First Cycle in Which the Action Appears: 2025–26

4. Defined Steps, Timeline, and Responsible Roles

1. Spring 2025 – Faculty Team develops a draft module (readings, examples, discussion prompts, and a short practice activity) aligned with the rubric component.
2. August 2025 – Course Coordinator finalizes the module and uploads it into the LMS course shell for all modalities.
3. Week 2 of Fall 2025 – Instructors integrate the module into their course schedule and ensure students complete the practice activity before the case-study assignment.
4. End of Fall 2025 – Assessment Coordinator collects instructor feedback on implementation and verifies consistent use across sections.
5. Spring 2026 – Faculty Team refines the module based on instructor feedback.
6. Fall 2027 – Data is collected to evaluate the action’s impact on student performance.

5. Resources: None required; module development and LMS integration fall within regular faculty and coordinator responsibilities.

Action Template: Empty

1. **Improvement Action:** Text here ...

2. **Rationale:** Text here ...

3. **First Cycle in Which the Action Appears:** Text here ...

4. **Defined Steps, Timeline, and Responsible Roles**
    1. Term Year – Responsible Role – Task
    2. Term Year – Responsible Role – Task
    3. Term Year – Responsible Role – Task

5. **Resources:** Text here ...

Appendix: More About Actions

External reviewers focus on Learning Improvement Actions, actions that improve student learning by changing how they learn and practice skills. These are different from Process Improvement Actions, actions that improve the accuracy, consistency, or usefulness of the measures, but that do not have a direct impact on student learning. Aim to have at least one Learning Improvement Action per program that has been fully developed, implemented, and evaluated for effectiveness every three years.

Process improvement actions are sometimes necessary and do demonstrate faculty engagement, however they do not add value in continuously seeking improvement in student learning. Below are examples of actions that fall under each category.

Learning Improvement Actions

Content Changes

- Adding a new module or unit focused on a specific subskill.
- Revising sequencing of the course to introduce key skills earlier.
- Embedding scaffolded practice activities aligned with the outcome.
- Integrating a shared assignment or case study across all sections.
- Updating course readings, materials, or software to better support skill development.

Pedagogy Changes

- Requiring earlier drafts with structured feedback.
- Adding guided practice or low-stakes exercises related to the identified skill gap.
- Introducing model examples and annotated exemplars.

Delivery Changes

- Coordinating instruction across multiple instructors to ensure consistent coverage of skills.

Faculty Capacity-Building (Student-Focused)

- Training faculty on how to teach/ model a specific subskill (e.g., new software).
- Holding a calibration session focused on instruction (not just scoring).

Process Improvement Actions

Changes to Measures

- Revising or refining the rubric (clarifying descriptors, adjusting scale).
- Adding a new subskill/component to the rubric to better capture the PLO.
- Changing the assignment prompt to better elicit evidence aligned with the PLO.
- Selecting a different artifact to assess (e.g., switching from exam questions to a writing sample).

Changes to Assessment Procedures

- Adjusting the sampling method.
- Changing when in the semester the assessment artifact is collected.
- Requiring dual scoring or improving inter-rater reliability processes.
- Standardizing the scoring instrument across courses or sections.

Changes to Where or When the Data Is Collected

- Moving the assessment to a different course where the skill is better taught or demonstrated.

Changes to Reporting and Analysis

- Introducing new disaggregation categories (e.g., modality or subtopic).
- Adding trend analysis or dashboards for better data use.