SH

Office of Assessment

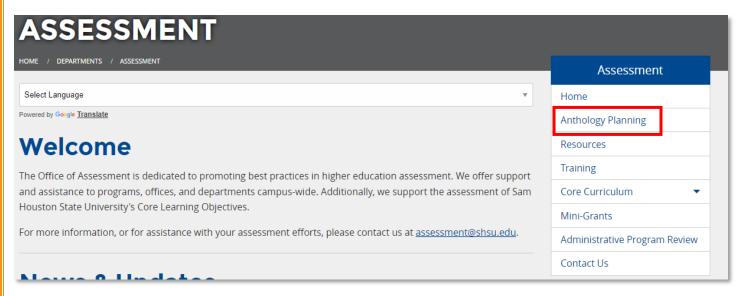**anthology Planning**

User Guide

Accessing the System
&
Adding and Editing Elements

Accessing Anthology Planning

From the Sam Houston State University homepage access the Assessment webpage under "Fast Links" or at https://www.shsu.edu/dept/assessment/.
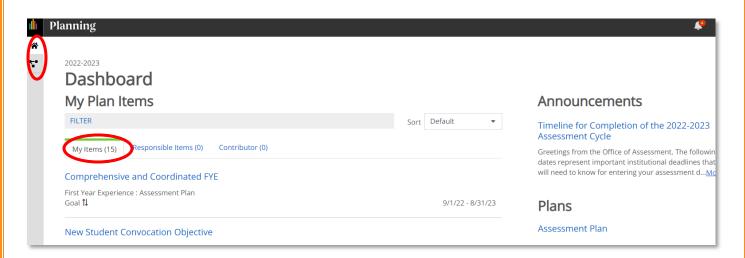

From the Assessment webpage, you will find a link to the Anthology Planning page using the menu on the right-hand side.

Once on the Anthology Planning Page click the "Click here to Access Anthology Planning" button. You will be automatically authenticated through a single sign-on process. Please contact us if you receive a message that states you do not have permission to access the site.
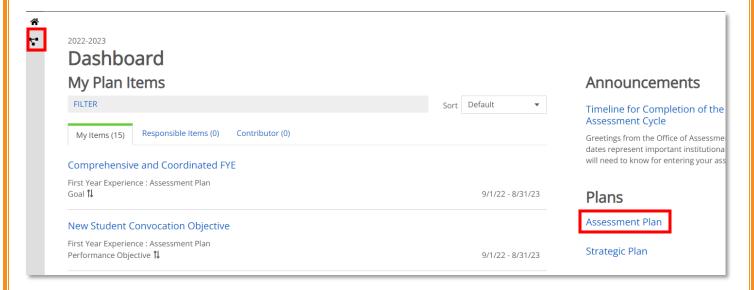

This will take you to the Anthology Planning page, where you will see everything available to you through the Dashboard and Assessment Plans icons on the left. The Dashboard will list any current messages or updates on the right. "My Items" are items you have added or modified.

The Dashboard will also display any assessment plan items you have access to and will allow you to navigate to your assigned assessment plans using the Assessment Plan icon on the left or the Assessment Plan link on the right under the Plans section.

The "My Units" tab will be where you access your existing assessment plan, edit existing elements, and add new elements. You will be able to view, but not edit, the assessment plans of other units using the "Institution" tab.

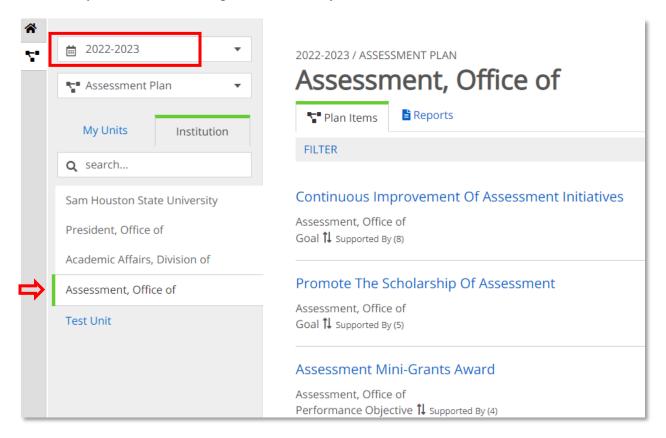You will be able to navigate to the appropriate academic year by using the drop-down box at the top left. Only those units to which you have specific access to edit will appear in your "My Units" tab.

NOTE: If you have access to a parent unit, then you will also have access to all its child units.

It is recommended that if you have a large assessment plan, then scroll to the bottom to choose the number of items to display per page. Up to 100 items can be displayed on one page.

There is also a Filter feature to view only one plan item type at a time. This is a very helpful feature for large assessment plans.

Just choose the desired item type you wish to review, then clear the filter when done.

Finally, reports to which you have access can be found under the "Reports" tab. All users should have access to the "Assessment Plan Summary" report. Clicking on the View Report link will show a dropdown list of options. Go to View Report to create a report that will provide you with an outline of your entire assessment plan for the date range shown. If a report is needed for a different academic year, then choose the Customize Dates link.

2022-2023 / ASSESSMENT PLAN

Assessment, Office of

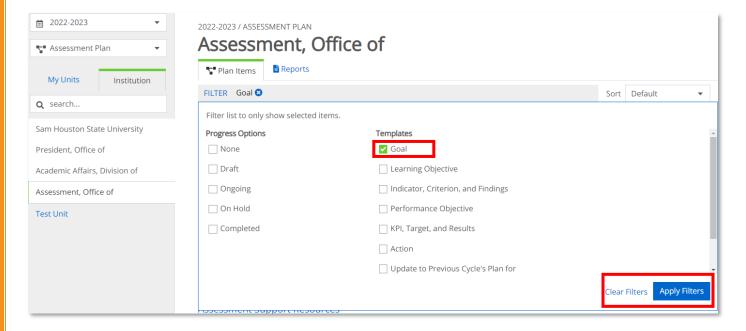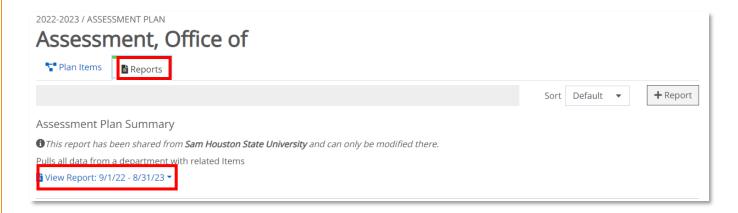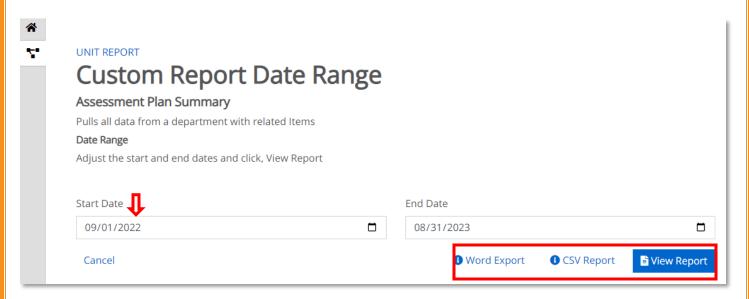🌳 Plan Items   📄 Reports

Sort   Default ▾   **+ Report**

Assessment Plan Summary

ℹ️ *This report has been shared from **Sam Houston State University** and can only be modified there.*

Pulls all data from a department with related Items

📄 View Report: 9/1/22 - 8/31/23 ▾

When choosing the Customize Dates option, be sure to leave the date range as 09/01/20XX-08/31/20XX – do not change the month and day, only the year. The easiest way to change the year is to click on the year itself and type in the year. Be sure to change the Start Date AND End Date to run the report correctly, then choose Word Export, CSV Report, or View Report.

🏠
🌳

UNIT REPORT

Custom Report Date Range

Assessment Plan Summary

Pulls all data from a department with related Items

Date Range

Adjust the start and end dates and click, View Report

Start Date	End Date
09/01/2022 📅	08/31/2023 📅

Cancel   ℹ️ Word Export   ℹ️ CSV Report   📄 View Report

The following is an example excerpt of the "Assessment Plan Summary" Report in HTML. This report will not be saved within Anthology Planning, so it is recommended that you either print a hard copy or save it on your device. Many Anthology Planning users have reported a preference for making updates to the report in a Word document, and then copying and pasting plan item descriptions into the interface. You can also share a Read Only copy of the report with other Anthology Planning users.

Adding and Editing Elements within Anthology Planning

To add **ANY** new elements to your assessment plan in Anthology Planning, you will use the "+ Plan Item" button to select the item you wish to add. The steps for adding any new elements are the same, regardless of the element.

Within each element you will see information about that assessment plan item that defines what should be entered in the description box.

When adding **ANU** new element, you will want to provide both a title and a description. you can also upload supporting documents to it through the "+ File" button, and you can create folders using the "+ Folder" button. There 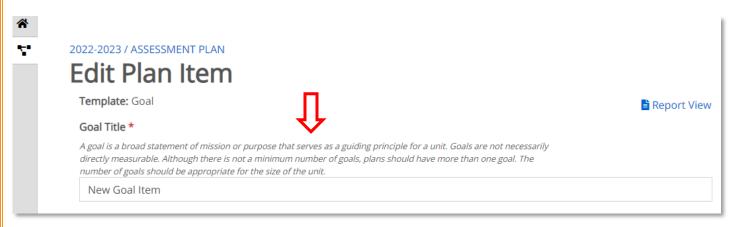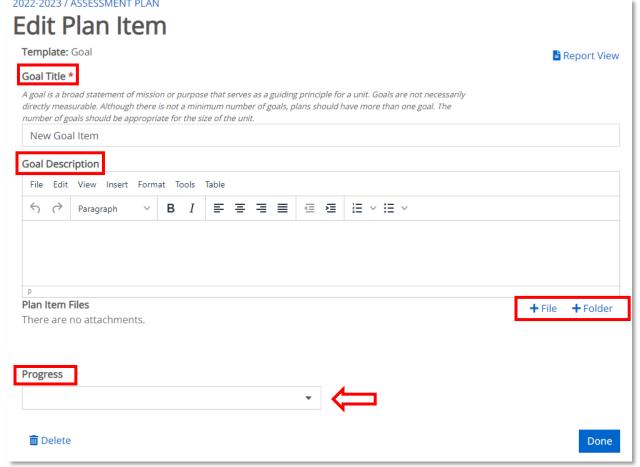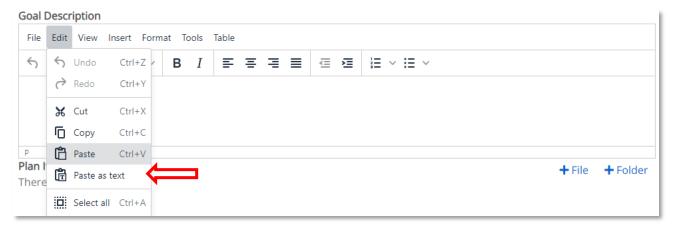is an optional "Progress" field that can be used to indicate the status of the element (Draft, Ongoing, On Hold, or Completed) for internal purposes. Any work within an assessment plan element is automatically saved as you go.

Edit Plan Item

Template: Goal

Report View

Goal Title *

A goal is a broad statement of mission or purpose that serves as a guiding principle for a unit. Goals are not necessarily directly measurable. Although there is not a minimum number of goals, plans should have more than one goal. The number of goals should be appropriate for the size of the unit.

New Goal Item

Goal Description

File   Edit   View   Insert   Format   Tools   Table

↶ ↷ Paragraph ∨ **B** *I* ≡ ≡ ≡ ≡ ⇤ ⇥ ⅰ≡ ∨ ≔ ∨

P

Plan Item Files   **+ File**   **+ Folder**
There are no attachments.

Progress

⯆   ⟵

🗑 Delete   Done

You can type your information directly into this box or copy it from an outside document. If you copy in from an outside source, it is recommended that you use the "Paste as text" option. Within this editor you can also format the text (**Bolding**, *Italicizing*, and Underlining), add bulleted or numbered lists, add tables, etc.

Goal Description

File   Edit   View   Insert   Format   Tools   Table

↶ | ↶ Undo   Ctrl+Z | **B** *I* ≡ ≡ ≡ ≡ ⇤ ⇥ ⅰ≡ ∨ ≔ ∨
    | ↷ Redo   Ctrl+Y |
    | ✂ Cut   Ctrl+X |
    | ⎘ Copy   Ctrl+C |
P | 📋 Paste   Ctrl+V |
Plan I | 📋 Paste as text | ⟵   **+ File**   **+ Folder**
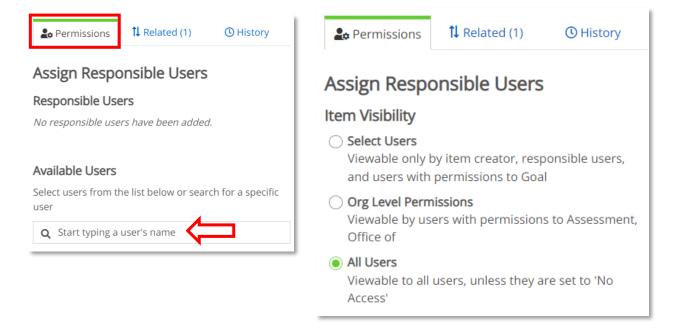There | 🔲 Select all Ctrl+A |

Attaching supporting documents to any assessment plan element is very similar to the process of attaching a file to an email. You will be given an option to browse your computer for the file you wish to attach. Once the document has been selected click the "Open" button. You can upload Word, Excel, PowerPoint, HTML, and PDF documents.

Plan Item Files   ✚ File   ✚ Folder

📄 SHSU Meta-assessment Rubric - 4-Point FINAL.pdf   ⟳ Replace   ✎ Rename   🗑

Documents can be edited or deleted by clicking on the desired edit icon on the far right.

Plan Item Files   ✚ File   ✚ Folder

📄 SHSU Meta-assessment Rubric - 4-Point FINAL.pdf   ⟳ Replace   ✎ Rename   🗑
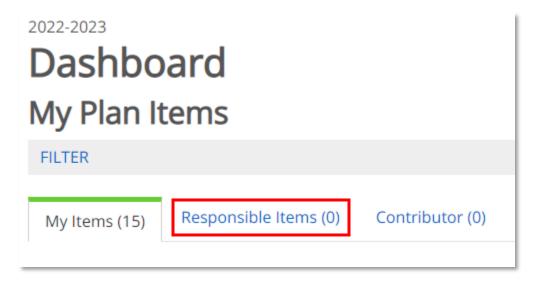
On the right-hand side of this page, you can relate the element to others within your assessment plan (explained in detail starting on page 13) and view the history of which user last updated the item.
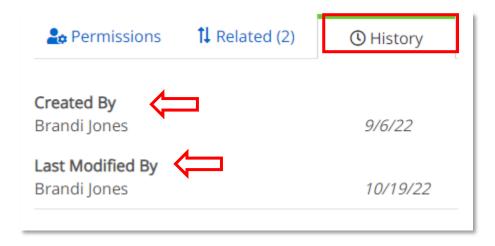
Assigning a "Responsible User" in the Permissions tab is an **optional** feature. A unit with several people working on their assessment plan may contact our office to further discuss this feature.

👤 Permissions	⇅ Related (1)	⏱ 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 ⬅

👤 Permissions	⇅ Related (1)	⏱ History

Assign Responsible Users

Item Visibility

◯ **Select Users**
Viewable only by item creator, responsible users, and users with permissions to Goal

◯ **Org Level Permissions**
Viewable by users with permissions to Assessment, Office of
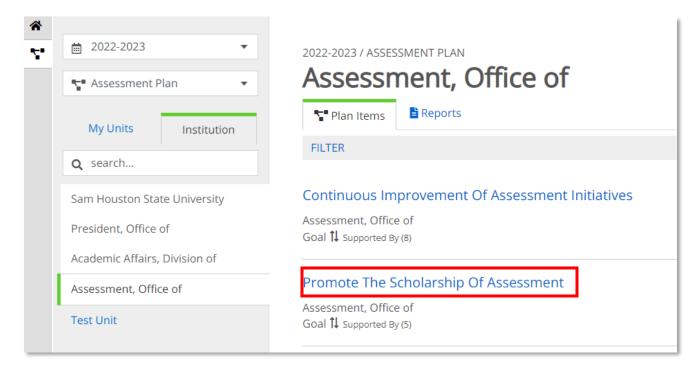
◉ **All Users**
Viewable to all users, unless they are set to 'No Access'

If your unit utilizes this feature, then your responsible items will be available on your Anthology Dashboard.

2022-2023

Dashboard

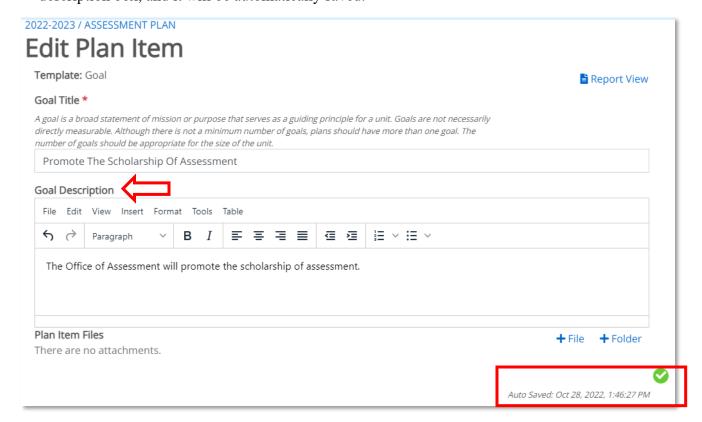## My Plan Items

FILTER

My Items (15)   Responsible Items (0)   Contributor (0)

The "History" tab will show who created the item, the last person who edited it, and when.

Permissions   **↑↓ Related (2)**   **⏱ History**

Created By
Brandi Jones   *9/6/22*

Last Modified By
Brandi Jones   *10/19/22*

To edit existing assessment plan items, click on the desired item to open the Edit Screen. The steps for editing <u>ANY</u> assessment plan element are the same, regardless of the element.
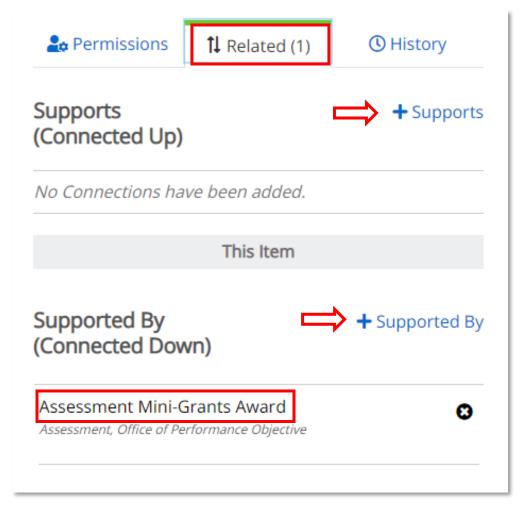

Once you have selected the item you wish to edit, simply type any updates in the title or description box, and it will be automatically saved.
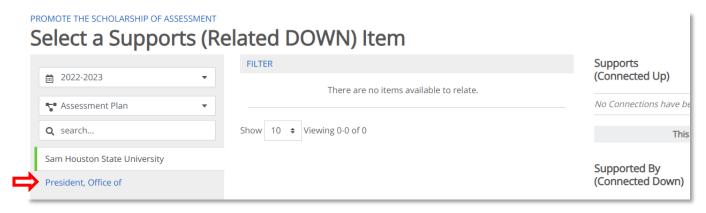
Once an assessment plan element has been created, it can be related to other elements within your assessment plan, as appropriate, using the "Related" tab. Objectives of all types support goals; indicators/criteria/findings support learning objectives; KPIs/targets/results support performance objectives; and actions support indicators/criteria/findings <u>and</u> KPIs/targets/results. These associations can be made using the "+ Supports" or "+ Supported By" buttons. Building these relationships will generate the structure that you see within your "Assessment Plan Summary" report. When an item is related, you can easily move through your plan by clicking the item under the Related tab.
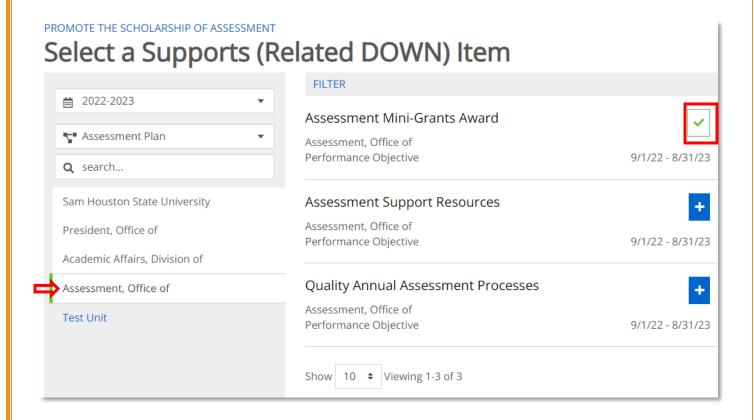
NOTE: In the following example, this item does not Support anything because it is a goal, and goals are first in an assessment plan. Actions will not be supported by anything since they are last. The PCI elements are stand-alone and will not be related to anything.

Once you are in the "Related" tab, you can associate assessment plan elements by filtering through the organization chart and selecting the "+" sign next to the correct plan item.

PLEASE NOTE: You will land on the Sam Houston State University level, which is why you will not have available items to relate here. Be sure to click on "President, Office of" on the left and navigate through the organizational chart to your specific unit.

To remove an association between assessment plan elements, simply locate where the plan item should be removed and click on the "X" to the right of the plan item. This does NOT delete the plan item, only the association.

You can easily keep track of related items within your plan. The ↑↓ symbol simply indicates an item is related to something. Next to the arrows you can see the total number of items that SUPPORT this plan item.
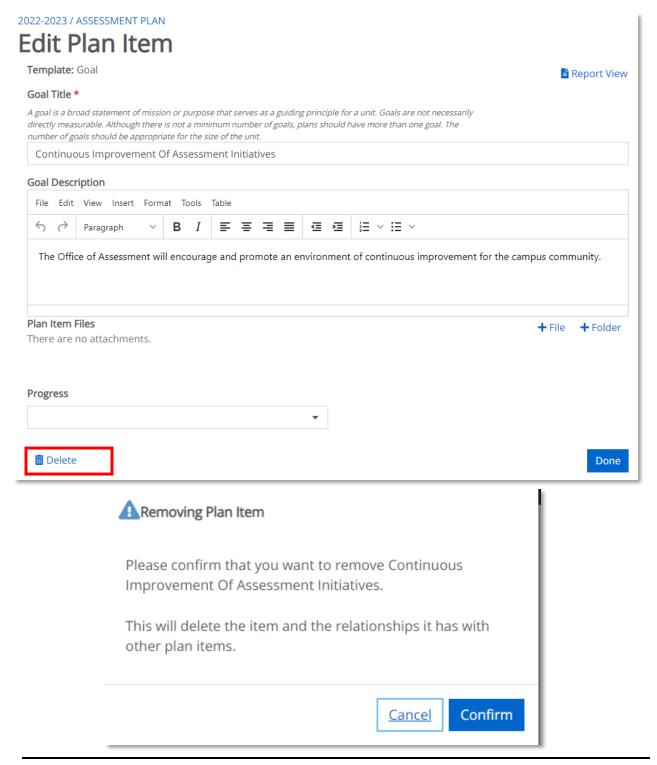
Check your assessment plan to make sure that you see the "Supported By" feature beneath ALL your plan items except for PCI's and Actions.

- All goals should be supported by learning objectives and/or performance objectives.
- All learning objectives should be supported by indicators/criteria/findings.
- All performance objectives should be supported by KPI's/targets/results.
- All indicators/criteria/findings and/or KPI's/targets/results should be supported by actions.
- Actions and PCI elements are NOT supported by anything.

If you see that an assessment plan item does not have a required supporting item, be sure to correct this prior to the end of this plan year.

Running an Assessment Plan Summary from the Reports tab will also help you to ensure that you have correctly related all items. If an item is not related, then it will not populate on your report.

If you need to delete a plan item, then navigate to the plan item, scroll to the bottom, and click the Delete link. A warning will appear allowing you to Cancel or Confirm deletion of that item. Once deleted, the item is permanently removed from your plan, and it cannot be retrieved.

2022-2023 / ASSESSMENT PLAN

Edit Plan Item

Template: Goal

📄 Report View

Goal Title *

A goal is a broad statement of mission or purpose that serves as a guiding principle for a unit. Goals are not necessarily directly measurable. Although there is not a minimum number of goals, plans should have more than one goal. The number of goals should be appropriate for the size of the unit.

Continuous Improvement Of Assessment Initiatives

Goal Description

File   Edit   View   Insert   Format   Tools   Table

↶ ↷   Paragraph   ⌄   **B**   *I*   ☰ ☰ ☰ ☰   ⊰ ⊱   ☷ ⌄ ☰ ⌄

The Office of Assessment will encourage and promote an environment of continuous improvement for the campus community.

Plan Item Files   ➕ File   ➕ Folder
There are no attachments.

Progress

[▾]

🗑 Delete   Done

⚠ Removing Plan Item

Please confirm that you want to remove Continuous Improvement Of Assessment Initiatives.

This will delete the item and the relationships it has with other plan items.

Cancel   Confirm

Assessment Plan Elements within Anthology Planning

Goal

A **goal** is a broad statement of mission or purpose that serves as a guiding principle for a unit. Goals are not necessarily directly measurable. Although there is not a minimum number of goals, plans should have more than one goal. The number of goals should be appropriate for the size of the unit.

Learning Objective (Related to Goals)

A **learning objective** is a specific and detailed expression of the expected knowledge or skills someone should gain as a result of receiving instruction or training. Learning objectives should use precise, measurable, observable verbs (e.g., analyze, create, identify, solve) instead of verbs that are not observable (e.g., understand, know, be familiar with). Each goal should be supported by more than one objective.

Performance Objective (Related to Goals)

A **performance objective** is a specific and detailed statement of the expected attainment of non-learning tasks (e.g., satisfaction with service, attendance/participation levels, student recruitment and enrollment, general administrative functions). They should describe the desired quality or improvement of services. Each goal should be supported by more than one objective.

Indicator, Criterion, Findings (Related to Learning Objectives)

An **indicator** is the method, instrument, process, or technique used to evaluate a learning objective; the means of gathering data. Indicators should clearly show how they can provide data for improving learning. They should describe the source of data (e.g., exam scores), the rubric or evaluation scale (e.g., Likert scale, pass/fail, %, etc.), and any contextual information (frequency of data collection, who will evaluate or score the items and review results, etc.). Assessment plans should include both direct and indirect measures, with an emphasis on direct measures. Units are encouraged to have multiple indicators per objective in order to triangulate their assessment results.

A **criterion** is the benchmark, value, or result that will represent success at achieving a learning objective. It should represent a feasible or reasonable amount of success. Include contextual information to explain how the criterion for success was selected and how it is appropriate for the objective. If the criterion is derived from professional standards, required licensure passage rates, etc., then those standards should be referenced as part of the criterion description.

Findings are a clear and concise summary of the information/data gathered from an assessment indicator. They should align with the corresponding criterion for success. Findings should provide actionable data that can clearly be used for improvement; compare new findings to past trends, previous results, and/or existing standards; provide a clear explanation that criterion were met, partially met, or not met; and provide supporting documentation, if applicable (e.g., completed rubrics). Be sure to redact any student identifying information from attachments. It is okay if a criterion is not met. This just provides an opportunity for future improvement.

Key Performance Indicator (KPI), Target, Results (Related to Performance Objectives)

A **KPI (Key Performance Indicator)** is the method, instrument, process, or technique used measure and evaluate a performance objective; the means of gathering data. They should clearly show how they can provide data for improving performance. KPIs should describe the source of data (e.g., survey data), the evaluation scale (e.g., Likert scale), and any contextual information (how data is gathered and by whom, who will review the results, etc.). Assessment plans should include both direct and indirect measures, with an emphasis on direct measures.

A **target** is the benchmark, value, or result that will represent success at achieving a performance objective. It should represent a feasible or reasonable amount of success. Include contextual information to explain how the target for success was selected and how it is appropriate for the objective.

Results are a clear and concise summary of the information gathered from a KPI. They should align with the corresponding target for success. Results should provide actionable data that can clearly be used for improvement; compare new findings to past trends, previous results, and/or existing standards; provide a clear explanation that targets were met, partially met, or not met; and include supporting documentation, if applicable (e.g., survey results). It is okay if a target is not met. This just provides an opportunity for future improvement.

Actions (Related to Performance and/or Learning Objectives)

Actions are specific steps to be taken to improve a program or unit based on analysis of the assessment findings and/or KPI results. They should either identify an area that needs to be monitored, remediated, or enhanced (define logical next steps, identify a responsible person or group, and include completion dates); or explain why a finding/result will not be assessed in the future. It is okay if some (but not all) actions identify an area of the assessment process that needs improvement (e.g., only changing the method or target). Actions related to learning objectives should be mostly focused on pedagogical and/or curricular changes to affect student learning.

Update to Previous Cycle's Plan for Continuous Improvement (PCI Update)

The **PCI update** should provide a progress update, with relevant contextual information, for all items discussed in the previous cycle's PCI. The narrative should clarify whether items in the previous cycle's PCI were completed or not, and to what extent. The narrative included within this item should be in past tense. You will NOT include future actions or your new PCI here.

Plan for Continuous Improvement (New PCI)

The **PCI (Plan for Continuous Improvement)** is a narrative summarizing all actions to be implemented into one coherent plan. The new PCI should be specific and detailed; include a summary of all identified actions found within the current plan; include any new initiatives or other items that will be assessed in the next cycle; and provide contextual information or details about what the actions are, how and when they will be implemented, and who will be responsible. The narrative included within this item should be in future tense.

Other Anthology Planning Definitions (Alphabetical Order)

Dashboard
The **Dashboard** serves as your primary navigation screen. From this screen you will be able to read announcements, and to access the various unit-level assessment plans to which you have access using the "My Units" tab.

Description
The **Description** is a detailed narrative that presents and explains the assessment plan element in such a manner that would be clear to an outside reviewer.

Institution Tab
The **Institution** tab allows you to view the assessment plans of other units from across campus but does not allow you to add or edit them, or to run reports on them.

My Units Tab
The **My Units** tab gives you access to only those assessment plans for which you have permission to modify or edit.

Plan Item Files
The **Plan Item Files** section allows you to attach supporting documents as evidence to support an assessment plan element. These documents can be in the form of sample rubrics, tests, collected assessment data, reports, etc. When attaching supporting documents make sure that no student- or faculty-identifying information is included within the document.

+ Plan Item
The **+ Plan Item** is used to create any new assessment plan items.

Progress
The **Progress** identifies whether a particular assessment element is complete. Assessment plan elements can be given one of four statuses: **Draft**, **Ongoing**, **On Hold**, and **Completed**. **Draft** indicates the assessment plan element is still being developed or is being revised. **Ongoing** indicates the assessment plan element is currently in use. **On Hold** is used to indicate that the assessment plan element is not being used for that cycle. **Completed** would be used when an assessment plan item was completed for the cycle.

Related Items
The **Related Items** tab allows you to connect plan items in two ways: supports (connected up) or supported by (connected down). A goal will not support anything, but it will be supported by a learning or performance objective. See the Assessment Plan Elements section above. Elements must be related in order to appear in the Assessment Plan Summary report view.

Title
A **Title** is a very short descriptor of an assessment plan element. The title should provide a general idea as to what that particular assessment plan is.