Office of Academic Planning & Assessment

User Guide

Accessing the System
&
Adding and Editing Elements
Accessing Anthology Planning

From the Sam Houston State University homepage access the Office of Academic Planning and Assessment (OAPA) webpage under “Fast Links.”

From the OAPA webpage, you will find a link to the Anthology Planning page under the “Assessment” tab.
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 entities to which you have specific access to edit will appear in your “My Dashboard.”

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.

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.
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 it 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.
When adding **any** 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.

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.
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.

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

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

**My Plan Items**

FILTER

My Items (6292) | Responsible Items (0) | Orphaned Items (0)

You are not indicated as responsible for any items in 2021-2022.

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

- **Created By**
  - Rachel Bubela 12/2/21

- **Last Modified By**
  - Rachel Bubela 12/2/21
To edit existing assessment plan items, click on the desired item to open the Edit Screen. The steps for editing ANY 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 can support Goals; Indicators/Criterion/Findings can support Learning Objectives; KPIs/Results can support Performance Objectives; and Actions can support Indicators/Criterion/Findings and KPIs/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 “plus” 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 organization chart to find 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 Up/Down arrows simply indicate item is related to something. Next to the arrows you can see the total of items that SUPPORT this plan item.

Check your assessment plan to make sure that you see the “Supported By” feature beneath ALL of 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 Indicator/Criterion/Findings.
- All Performance Objectives should be supported by KPI’s/Results.
- All Indicator/Criterion/Findings and/or KPI’s/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, 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.

2020-2021 / ASSESSMENT PLAN

Edit Plan Item

Goal Title *
A Goal is a broad statement of mission or purpose that serves as a guiding principle for a unit. By their nature, Goals are not necessarily measurable. Although there is not a magic number of Goals a unit should have, most units will find 3-5 Goals to be reasonable.

Promote The Scholarship Of Assessment

Goal Description

The Office of Academic Planning and Assessment will promote the growing scholarship of assessment within SHSU, Texas, and the nation, through research, presentations, and publications.

Plan Item Files

Progress

Delete

Removing Plan Item

Please confirm that you want to remove Promote The Scholarship Of Assessment.

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 the guiding principles of a unit. By their nature, Goals are not necessarily directly measurable. While there is no “magic” number of Goals, most units will probably find 3-5 Goals to be reasonable.

Learning Objective (Related to Goals)
Learning Objectives are specific and detailed expressions of the expected knowledge or skills someone should gain as a result of receiving instruction or training. Generally, Learning Objectives are utilized by degree programs, where they focus on the specific student learning outcomes associated with a degree. They must be measurable and aligned with the Goals.

Performance Objective (Related to Goals)
Performance Objectives are specific and detailed expressions of the expected level of attainment of non-learning tasks (i.e., satisfaction with service, attendance/participation levels, student recruitment and enrollment, general administrative functions, etc.). Generally, Performance Objectives are found within all units not directly engaged with student instruction. They must be measurable and aligned with the Goals.

Indicator, Criterion, Findings (Related to Learning Objectives)
Indicators are the instruments, processes, or evidence, both direct and indirect, used by a unit to assess a Learning Objective. Indicators should be described in detail. It should be clear what the instrument/process is, how it was developed, how it was implemented, and how it is being used to gather assessment results that are useful to the program. Units are encouraged to have multiple Indicators per objective to triangulate their data. Examples of instruments being used should be attached, if appropriate.

Criterion are utilized with Indicators to assess Learning Objectives. Criterion are the specific and detailed level of expected attainment for an Objective. The Criterion description should include all relevant information about how that Criterion was established and determined to be appropriate. 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. It is perfectly ok if a Criterion is not met. Assessment is not about punishing units when they do not meet their objectives; rather, it is about identifying areas for continuous improvement. If a Criterion was not met it just means that a unit has identified an area in which they should take action for improvement.

Findings are the data resulting from the unit’s assessment measures and are used to determine whether an Objective was successfully met. Findings should be detailed, breaking down what a unit has discovered as a result of its assessment, in order to identify areas for potential improvement. Supporting documents should be provided, if appropriate.
**Key Performance Indicators (KPIs) and Results (Related to Performance Objectives)**

**KPIs** are the instruments, processes, or evidence, both direct and indirect, used by a unit to assess a performance objective. **KPIs** should be described in detail. It should be clear what the instrument/process is, how it was developed, how it was implemented, and how it is being used to gather assessment results that are useful to the program. Examples of instruments being used should be attached, if appropriate. **KPI** descriptions should also include information that outlines expected levels of attainment/success. It is perfectly ok if a **KPI** is not met. Assessment is not about punishing units when they do not meet their objectives; rather, it is about identifying areas for continuous improvement. If a **KPI** was not met it just means that a unit has identified an area in which they should take action for improvement.

**Results** are the data resulting from the unit’s assessment measures and are used to determine whether an **Objective** was successfully met. **Results** should be detailed, breaking down what a unit has discovered as a result of its assessment, in order to identify areas for potential improvement. Supporting documents should be provided, if appropriate.

**Actions (Related to Performance and/or Learning Objectives)**

**Actions** are the next steps to be taken by a unit in response to specific assessment **Findings** or **Results**. Actions are associated with specific **Findings** or **Results**. A unit’s **Actions** should be clearly driven by assessment results for that particular **Indicator/Criterion** or **KPI** and should clearly relate to improving that **Objective**. Within meaningful, mature, and well-developed assessment plans it is very rare for a unit to meet all its **Objectives** and have nothing on which it can improve. Even when an **Objective** is met, units may find some reason for action when they analyze their assessment results.

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

This element provides the entity a chance to update progress made towards completing the action-items identified within their previous cycle’s **Plan for Continuous Improvement**. The narrative for the Previous Cycle’s “**Plan for Continuous Improvement**” should provide sufficient detail to address whether all action-items were accomplished and to what level of success. If action-items were not completed, the entity should provide an explanation.

**Plan for Continuous Improvement (New PCI)**

The **Plan for Continuous Improvement** provides an entity with an opportunity to combine its various **Actions**, along with any other action-items not included elsewhere within the assessment report, together into a coherent and detailed plan. The items included within the **Plan for Continuous Improvement** should be clearly based on a unit’s assessment results, and should include details about what they are, how and when they will be implemented, and who will be responsible.
**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.