



Planning User Guide

Accessing the System & Adding and Editing Elements

Accessing Blackboard Planning

From the Sam Houston State University homepage, access the Assessment webpage under “Tools & Support,” “Site Directory” then scroll down to find “Assessment” under Academic Affairs or at <https://www.shsu.edu/offices-departments/assessment>.



From the Assessment webpage, you will find a link to the Blackboard Planning page on the left-hand side menu.



Once on the Blackboard Planning Page, select the "Access Planning" button. The platform will automatically authenticate 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.

BLACKBOARD PLANNING

ACCESS PLANNING

OFFICE OF ASSESSMENT HOME

NEWS AND UPDATES

BLACKBOARD PLANNING

OFFICE OF ASSESSMENT STAFF

RESOURCES

Blackboard Planning User Guide

Please Note: Your descriptions for each assessment plan item must align with the definition provided in each template. Plan item definitions with examples can be found [here](#).

Blackboard Planning serves as the University's centralized, online assessment plan management repository for our annual programmatic assessment process. Information collected within Blackboard Planning is used by departments and programs to drive continuous improvement. Additionally, these data serve as evidence of continuous improvement for internal and external constituents, agencies, and accreditors.

Timeline for Completion of the 2025-2026 Assessment Cycle

You will arrive at the Blackboard 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.

Planning

2025-2026

Dashboard

My Plan Items

FILTER

Sort: Default

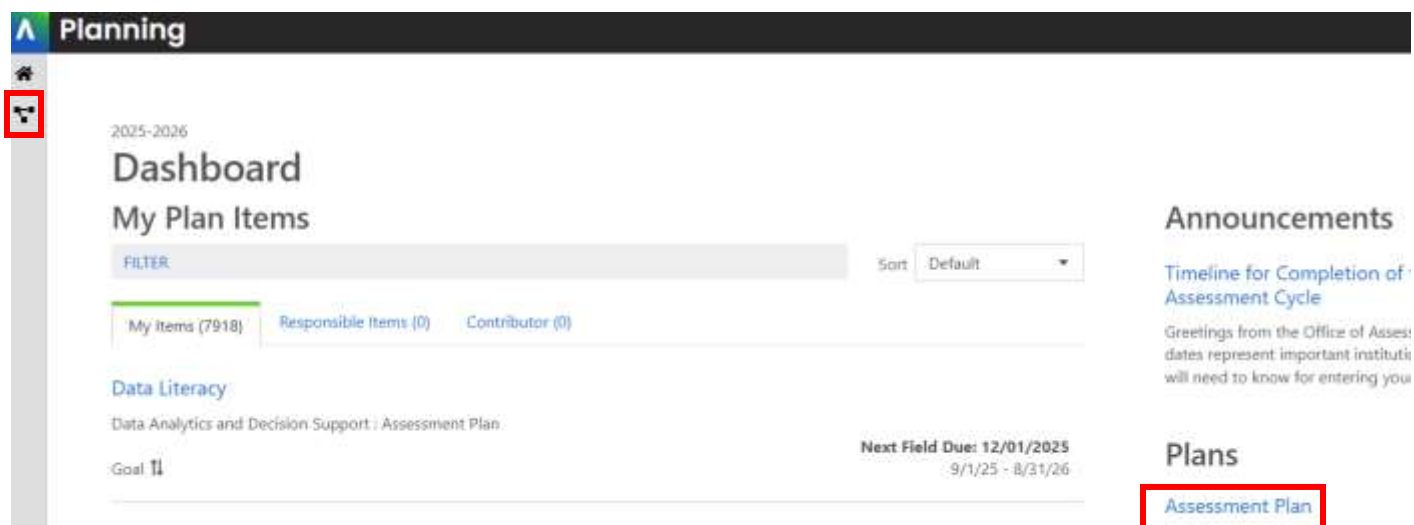
My Items (7918) Responsible Items (0) Contributor (0)

Announcements

Timeline for Completion of the 2025-2026 Assessment Cycle

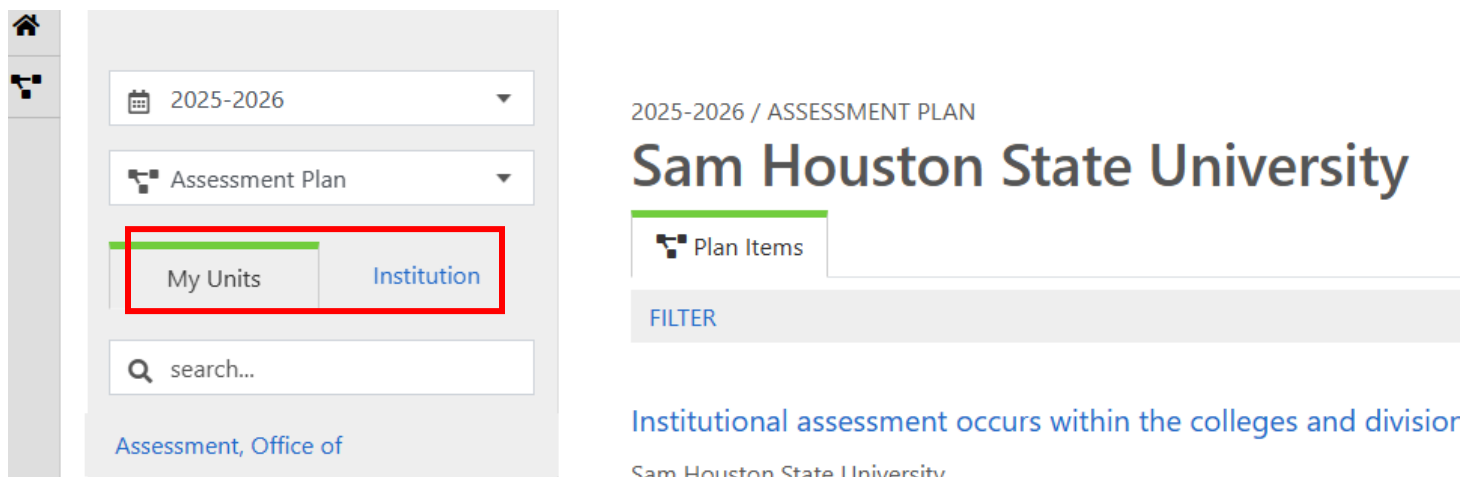
Greetings from the Office of Assessment. The following dates represent important institutional deadlines that

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 screenshot shows the 'Planning' dashboard. On the left sidebar, the 'Assessment Plan' icon is highlighted with a red box. The main content area is titled 'Dashboard' for the '2025-2026' year. It includes a 'My Plan Items' section with a 'FILTER' bar and a 'Sort' dropdown set to 'Default'. Below this are tabs for 'My Items (7918)', 'Responsible Items (0)', and 'Contributor (0)'. A 'Data Literacy' section is also visible. On the right, there are 'Announcements' and a 'Plans' section where the 'Assessment Plan' link is highlighted with a red box. A 'Next Field Due' date of 12/01/2025 is also shown.

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



The screenshot shows the 'Assessment Plan' interface for '2025-2026 / ASSESSMENT PLAN' at 'Sam Houston State University'. On the left sidebar, the 'My Units' tab is highlighted with a red box, and the 'Institution' tab is also visible. The main content area has a 'Plan Items' tab and a 'FILTER' bar. Below the filter, there is a section titled 'Institutional assessment occurs within the colleges and division' for 'Sam Houston State University'.

You can navigate to the appropriate academic year by using the dropdown box located 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.

2025-2026 / ASSESSMENT PLAN

Assessment, Office of

Plan Items Reports

FILTER

Continuous Improvement of Assessment Init

Assessment, Office of

Goal ↑↓ Supported By (16)

Promote The Scholarship Of Assessment

Assessment, Office of

Goal ↑↓ Supported By (6)

Assessment Mini-Grant Applications

If you have an extensive assessment plan, we recommend scrolling to the bottom to select the number of items to display per page. You can display up to 100 items on one page.

Annual Meta-Assessment Process - Non-Academic

Assessment, Office of

KPI, Target, and Results ↑↓ Supported By (1)

Next Field Due: 12/01/2025

9/1/25 - 8/31/26

Show 10 Viewing 1-10 of 26

Previous 1 2 3 Next

There is also a Filter feature that allows you to view only one plan item type at a time, which is helpful for large assessment plans.

The screenshot shows the 'Assessment, Office of' interface. On the left is a sidebar with a home icon, a menu icon, and a search bar. The main content area has a header '2025-2026 / ASSESSMENT PLAN' and a title 'Assessment, Office of'. Below the title are tabs for 'Plan Items' and 'Reports'. A 'FILTER' button is highlighted with a red box. Below the filter button, there is a list of items: 'Continuous Improvement of Assessment Initiatives', 'Assessment, Office of', 'Goal' (with a dropdown arrow), and 'Supported By (16)'. Below this list is a link 'Promote The Scholarship Of Assessment'.

Select the desired item type you wish to review, then clear the filter when you're done.

The screenshot shows the 'Assessment, Office of' interface with the 'FILTER' dialog box open. The dialog box has a title 'FILTER: Goal' and a 'Sort' dropdown set to 'Default'. It contains two sections: 'Progress Options' and 'Templates'. In the 'Progress Options' section, there are checkboxes for 'None', 'Draft', 'Ongoing', 'On Hold', and 'Completed'. In the 'Templates' section, there are checkboxes for 'Goal', 'Learning Objective', 'Indicator, Criterion, and Findings', 'Performance Objective', 'KPI, Target, and Results', 'Action', and 'Update to Previous Cycle's Plan for'. The 'Goal' checkbox is checked and highlighted with a red box. At the bottom right of the dialog box, there are two buttons: 'Clear Filters' and 'Apply Filters', both highlighted with a red box.

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 display a dropdown list of options. Go to View Report to create a report that provides an outline of your entire assessment plan for the specified date range. If you need a report for a different academic year, select the “Customize Dates” link.

2025-2026 / ASSESSMENT PLAN

Assessment, Office of

Plan Items Reports

Assessment Plan Summary

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: 9/1/25 - 8/31/26

Assessment Plan Summary

This report has been shared from Sam Houston State University and

Pulls all data from a department with related Items

View Report: 9/1/25 - 8/31/26

View Report

Customize Dates

CSV Report

Word Export

Print

When choosing the Customize Dates option, ensure that you set the date range to 09/01/20XX-08/31/20XX – do not modify the month and day, only the year. The easiest way to change the year is to click on the year itself and enter the new year. Be sure to change both the Start Date and End Date to run the report correctly, then select 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

09/01/2025

End Date

08/31/2026

Cancel

Word Export

CSV Report

View Report

The following is an example excerpt of the "Assessment Plan Summary" Report in HTML. Blackboard Planning does not save the report within the platform, so we recommend printing a hard copy or saving it to your device. Many Blackboard 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 Blackboard Planning users.

UNIT REPORT
Academic Program Example - Assessment Plan Summary
Generated: 9/13/25, 12:34 AM

☐ Recurse calculations on related items

Customize Dates CSV Report Word Export Print Share Item

Filter Report
No Filters Applied

Clear Filters Apply Filters
Report view currently reflects all filter option selections.

Academic Program Example

Goal 1

Goal Description:
Broad statements of mission or purpose that serve as the guiding principle of a unit.

Providing Department: Academic Program Example

RELATED ITEMS/LEVELS

RELATED ITEM LEVEL 1

Learning Objective 1

Learning Objective Description:
Specific, detailed, and measurable statements of the expected knowledge, skills, or abilities gained as a result of receiving instruction or training.

RELATED ITEM LEVEL 2

Indicator, Criterion, and Findings 1A

Indicator - Method of Measurement: D - Exam

Indicator - Method of Measurement Description:
The methods, instruments, processes, or techniques used to measure and evaluate learning objectives; the means of gathering data.

Adding and Editing Elements within Blackboard Planning

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



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

2025-2026 / ASSESSMENT PLAN

Edit Plan Item

Template: Goal

[Report View](#)

Goal Title *

Enter a brief title for this item here. The detailed narrative will go in the description box below.

New Goal Item

Goal Description

Due: 12/01/2025

DEFINITION: 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.

When adding **ANY** new element, you will want to provide both a title and a description. You can also upload supporting documents through the "+ File" button and create folders using the "+ Folder" button. There is an optional "Progress" field 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 *

Enter a brief title for this item here. The detailed narrative will go in the description box below.

New Goal Item

Goal Description Due: 12/01/2025

Enter a brief description of the 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.

File Edit View Insert Format Tools Table

Undo Redo Paragraph B I [Text Alignment Icons] [List Icons]

Plan Item Files + File + Folder

There are no attachments.

Progress

[Progress Dropdown]

Delete Done

You can type your information directly into this box or copy and paste it from an external document. If you copy from an external source, we recommend using 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 [Text Alignment Icons] [List Icons]

Redo Ctrl+Y

Cut Ctrl+X

Copy Ctrl+C

Paste Ctrl+V

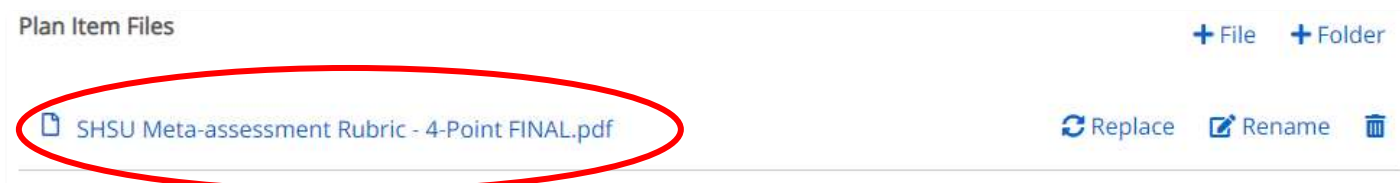
Paste as text

Select all Ctrl+A

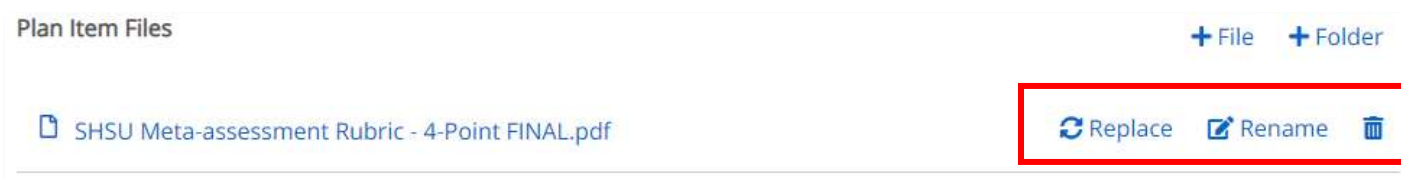
Plan Item Files + File + Folder

There are no attachments.

Attaching supporting documents to any assessment plan element is similar to attaching a file to an email. You will have an option to browse your computer for the file you wish to attach. Once you select the document, click the "Open" button. You can upload documents in Word, Excel, PowerPoint, HTML, and PDF formats.

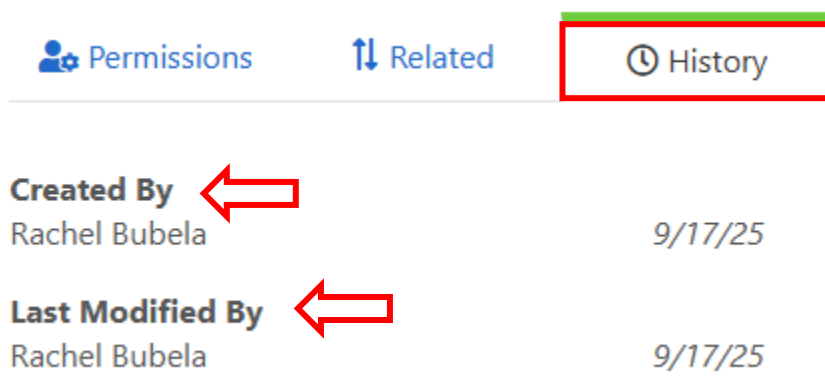


Documents can be edited or deleted by clicking on the desired edit icon on the far right.



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 12) and view the history of the last user to update the item.

The "History" tab displays the creator of the item, the last person to edit it, and the date of the previous edit.



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.

The screenshot shows the '2025-2026 / ASSESSMENT PLAN' interface. On the left is a navigation menu with a home icon, a list icon, and a dropdown menu for '2025-2026'. Below this is a search bar and a list of units: 'Sam Houston State University', 'President, Office of', 'Academic Affairs, Division of', 'Assessment, Office of' (highlighted), 'Academic Program Example', and 'Administrative/Support Unit Example'. The main content area shows the 'Assessment, Office of' page with tabs for 'Plan Items' and 'Reports'. A 'FILTER' button is present. Below this is a list of assessment plan items. The first item is 'Continuous Improvement of Assessment Initiatives' with a goal of 'Assessment, Office of' and 'Supported By (16)'. The second item is 'Promote The Scholarship Of Assessment' (highlighted with a red box) with a goal of 'Assessment, Office of' and 'Supported By (6)'.

Once you have selected the item you wish to edit, type any updates in the title or description box, and it will be automatically saved.

The screenshot shows the 'Edit Plan Item' screen for the 'Promote The Scholarship Of Assessment' item. The page title is '2025-2026 / ASSESSMENT PLAN'. The main heading is 'Edit Plan Item'. Below this is a 'Template: Goal' label and a 'Report View' button. The 'Goal Title' field is labeled 'New Goal Item'. The 'Goal Description' field is labeled 'Test' and has a red arrow pointing to it. Below the description field is a 'Plan Item Files' section with a '+ File' and '+ Folder' button. At the bottom right, there is a red box containing a green checkmark and the text 'Auto Saved: Sep 17, 2025, 9:07:28 AM'.

Once you create an assessment plan element, 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 and KPIs/targets/results. These associations are 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 any other elements.

Permissions **Related (1)** History

Supports (Connected Up)  + Supports

No Connections have been added.

This Item

Supported By (Connected Down)  + Supported By

Assessment Mini-Grants Award 

Assessment, Office of Performance Objective

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 your available items to relate to will not be displayed here. Be sure to click on "President, Office of" on the left and navigate through the organizational chart to your specific unit.

NEW GOAL ITEM

Select a Supports (Related DOWN) Item

2025-2026

Assessment Plan

search...

Sam Houston State University

President, Office of

SHSU Strategic Plan

FILTER

There are no items available to relate.
For access to items to relate, contact your site administrator.

Show 10 Viewing 0-0 of 0

Supports (Connected Up)

No Connections have

Supported By (Connected Down)

No Connections have

Select a Supports (Related DOWN) Item

2025-2026

Assessment Plan

search...

Sam Houston State University

President, Office of

Academic Affairs, Division of

Assessment, Office of

FILTER

Assessment Mini-Grant Applications
Assessment, Office of
Performance Objective
9/1/25 - 8/31/26

Assessment Mini-Grant Quality
Assessment, Office of
Performance Objective
9/1/25 - 8/31/26

Assessment Support Resources

To remove an association between assessment plan elements, locate the plan item to be removed and click the "X" to the right of it. This action does not delete the plan item; it only deletes the association.

The screenshot shows a web interface with three tabs: 'Permissions', 'Related (1)', and 'History'. The 'Related (1)' tab is selected and highlighted with a green border. Below the tabs, there are two main sections: 'Supports (Connected Up)' and 'Supported By (Connected Down)'. The 'Supports' section has a '+ Supports' link and a message 'No Connections have been added.' The 'Supported By' section has a '+ Supported By' link and lists one item: 'Assessment Mini-Grants Award' with the subtitle 'Assessment, Office of Performance Objective'. To the right of this item is a red circle containing a black 'X' icon, indicating a removable association.

You can keep track of related items within your plan. The ↑↓ symbol indicates an item is related to something. Next to the arrows, you can see the total number of items that SUPPORT this plan item.

Assessment, Office of

The screenshot shows the 'Assessment, Office of' page with two tabs: 'Plan Items' and 'Reports'. The 'Plan Items' tab is selected. Below the tabs is a 'FILTER' input field, a 'Sort' dropdown menu set to 'Default', and a '+ Plan Item' button. The main content area displays 'Continuous Improvement of Assessment Initiatives' and 'Assessment, Office of'. At the bottom left, a red box highlights the text 'Goal ↑↓ Supported By (16)'. At the bottom right, it says 'Next Field Due: 12/01/2025' and '9/1/25 - 8/31/26'.

Check your assessment plan to ensure 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 before the end of the plan year.

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

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

Edit Plan Item

Template: Goal

 Report View

Goal Title *

Enter a brief title for this item here. The detailed narrative will go in the description box below.

New Goal Item

Goal Description

 Due: 12/01/2025

DEFINITION: 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.

File	Edit	View	Insert	Format	Tools	Table	
		Paragraph	▼	B	<i>I</i>		
Test							
P							

Plan Item Files

There are no attachments.

[+ File](#) [+ Folder](#)

Auto Saved: Sep 17, 2025, 9:13:11 AM

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 Blackboard 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 no 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 statement of the expected knowledge or skills that someone should acquire 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, serving as the means of gathering data. Indicators should clearly demonstrate how they can provide data to improve 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 to triangulate their assessment results.

A **criterion** is the benchmark, value, or result that represents success in 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. Suppose the criterion is derived from professional standards, required licensure passage rates, etc. In that case, 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; give a clear explanation that criteria 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 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 to measure and evaluate a performance objective; the means of gathering data. They should clearly demonstrate how they can provide data to improve 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 represents success in 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; give 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 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 an analysis of 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 primarily focus on pedagogical and/or curricular changes that impact student learning.

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

The **PCI update** should provide a progress update, along 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 and, if so, to what extent. The narrative included in this item should be written in the 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 that summarizes all actions to be implemented into a 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 in this item should be written in the future tense.

Other Blackboard Planning Definitions (Alphabetical Order)

Dashboard

The **Dashboard** serves as your primary navigation screen. From this screen, you will be able to read announcements and 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 clearly to an outside reviewer.

Institution Tab

The **Institution** tab enables you to view the assessment plans of other units across the campus. Still, it 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 take the form of sample rubrics, tests, collected assessment data, reports, and other relevant materials. 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 that the assessment plan element is still being developed or is under revision. "**Ongoing**" means the assessment plan element is currently in use. "**On Hold**" indicates that the assessment plan element is not in use for that cycle. "**Completed**" indicates that an assessment plan item is 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 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 of what that particular assessment plan is.