

Administrative Effectiveness Evaluation (AEE)

2023-2024

Office of Institutional Accreditation & Effectiveness



WILLIAM & MARY

CHARTERED 1693

What You Need to Know

Purpose of Administrative Effectiveness Evaluation (AEE)

- Better our programs/services/processes
- Serve the needs of our stakeholders
- Tell our story to internal and external entities
- Demonstrate compliance with SACSCOC *Principles of Accreditation (January 2018)*

What You Need to Know

SACSCOC *Principles* Section 7: Institutional Planning & Effectiveness

“Effective institutions demonstrate a commitment to principles of **continuous improvement**, based on a **systematic and documented process** of assessing institutional performance with respect to mission **in all aspects** of the institution. An institutional planning and effectiveness process involves **all programs, services, and constituencies . . .**”

What You Need to Know

SACSCOC *Principles* Standard 7.3:

“The institution **identifies expected outcomes** of its administrative support services and **demonstrates the extent to which the outcomes are achieved.** (Administrative effectiveness)”

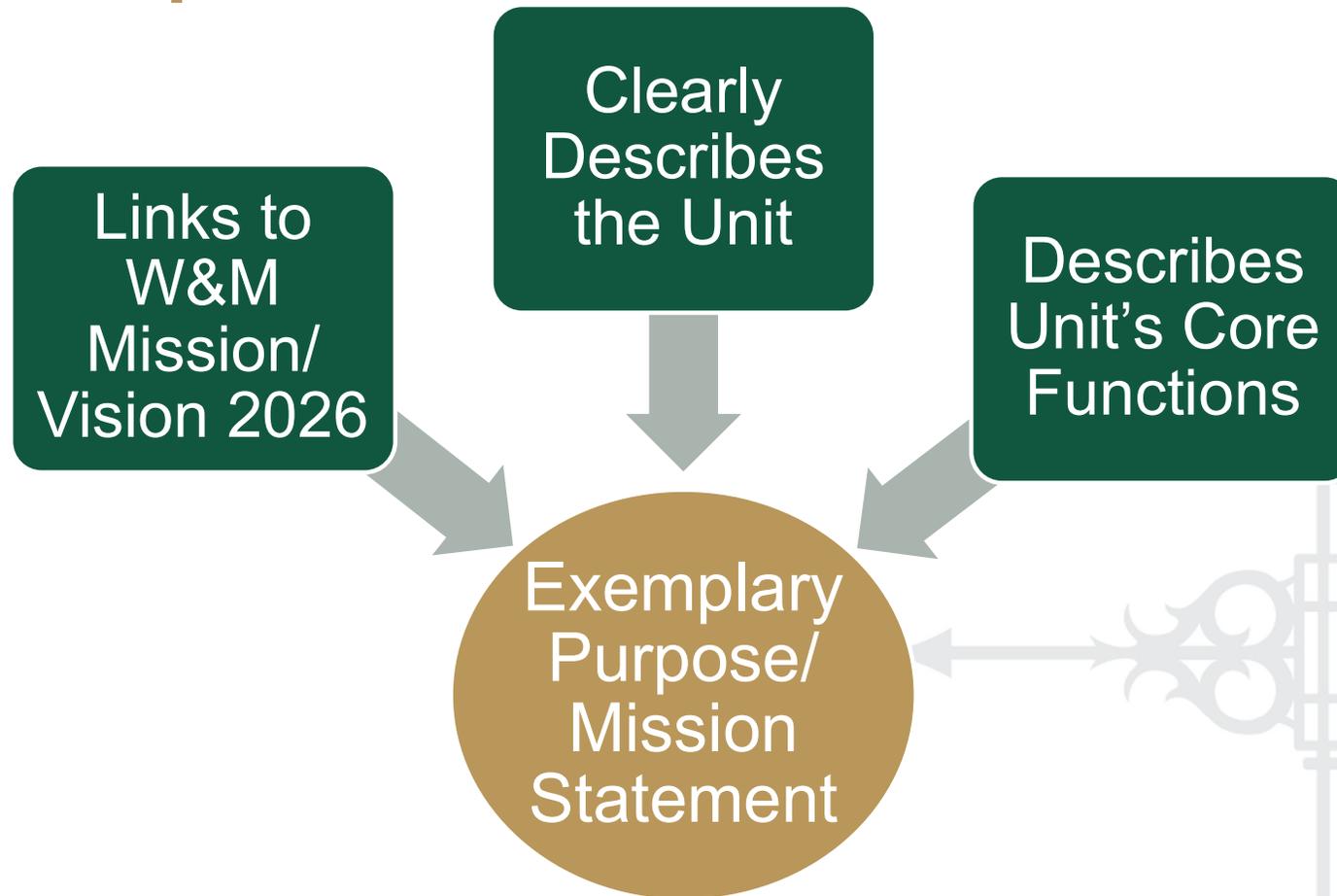
Note: No longer required to provide “evidence of seeking improvement” as with Section 8 standards.

What You Need to Know

AEE Plan, Results, & Achievement Reporting Components

- Purpose/Mission Statement
- Goal & Expectations
- Evaluation Plan
- Results, Target Achievement, & Action Plans

Purpose/Mission Statement



Goal & Expectations

Goal: Efficient & Effective Operations Leading to Stakeholder Satisfaction

Expectation 1:
Efficient & Effective Operations

Expectation 2:
Quality of Service/
Stakeholder Satisfaction

Expectations

Expectation 1: Efficient & Effective Operations

Unit establishes & maintains efficient & effective operations, optimizing processes & resources to achieve targets.

- Covers majority of unit functions
- Use as opportunity to examine an aspect of operations more closely
- Choose a process, facility, technology, equipment, performance indicator, etc. to measure for efficiency &/or effectiveness

Expectations

Expectation 2: Stakeholder Satisfaction

Unit ensures high-quality service delivery & meets stakeholder expectations to achieve targets.

- Relates to satisfaction of stakeholders with services, facilities, resources, technology, etc. the unit provides
- Often evaluated through surveys or focus groups to discover perceptions about the unit
- Units may sync operational evaluation with satisfaction evaluation = efficiency/effectiveness & satisfaction

Evaluation Plan

For each Expectation, describe:

- Participants collecting, reviewing, & analyzing data
- Data Sources, Collection, & Review Process
 - Data
 - Methods
 - Schedule for review & reporting
- Achievement Target: intended results (qualitative/quantitative) of evaluation

Results, Target Achievement, Action Plan

For each Expectation, describe:

- Summary & Analysis of Evaluation Results
- Achievement Target Status
 - Met
 - Partially Met
 - Not Met
- Action Plan (if Partially or Not Met): actions to meet target next evaluation cycle

AEE Timeline



QUESTIONS?



Instructions for Logging into & Navigating Anthology Planning Software



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GENERAL LOGISTICS



1

General Logistics

- Go to <https://wm.campuslabs.com/planning/dashboard>
- Enter your W&M User ID & Password.



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W&M Central Authentication Service

WMuserid:

Password:

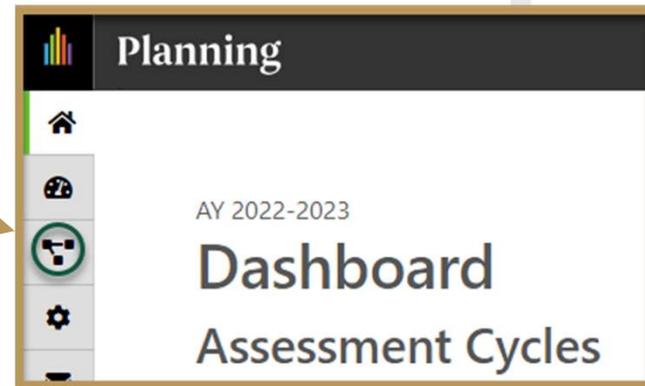
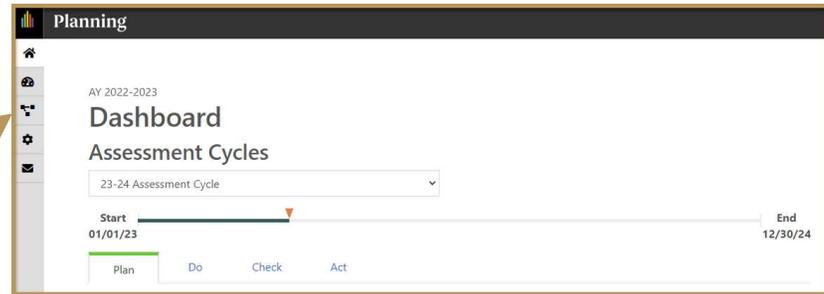
I am at a public workstation.

LOGIN

2

General Logistics

- Your **Dashboard** displays here.
- Select the **Plans** icon to access your Administrative Effectiveness Evaluation(s) (AEE).



3

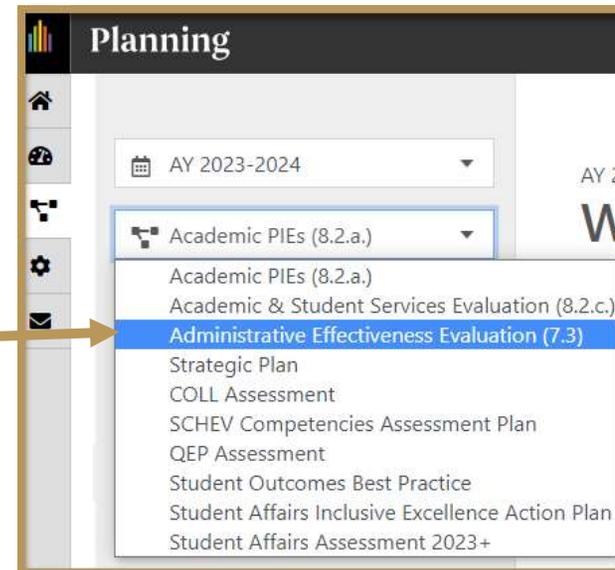
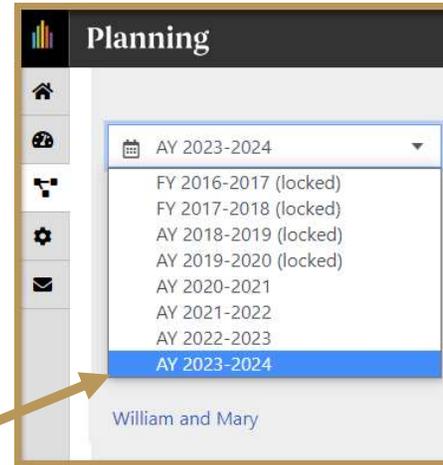
General Logistics

- Ensure you are working in the current **Academic Year**.

Planning is set to default to the current year.

- Select **Administrative Effectiveness Evaluation (7.3)** inside the dropdown list.

It may be the only item on your list.

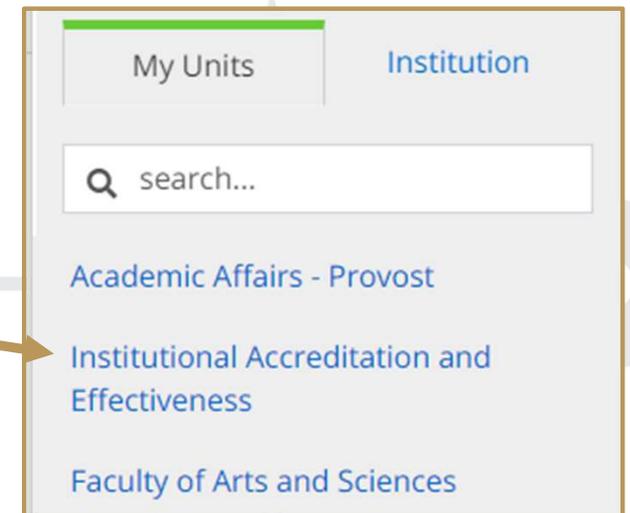


4

General Logistics



- Select the **My Units** Tab in the left-hand navigation menu.
- Select your unit/department from the left-hand navigation pane and then select your sub-unit, if applicable.
e.g., Institutional Accreditation and Effectiveness. The unit(s) to which you have permissions will display.



5

General Logistics

- Your Administrative Effectiveness Evaluation **Plan Items** display here.
- Click the item name to access and complete your unit's **Purpose/Mission Statement** and two **AEE Expectations**.
Expectation 1 – Efficient & Effective Operations and Expectation 2 – Quality of Service/Stakeholder Satisfaction.

AY 2023-2024 / ADMINISTRATIVE EFFECTIVENESS EVALUATION (7.3)

Institutional Accreditation and Effectiveness

Plan Items Reports Documents

FILTER Sort Default + Plan Item

[Institutional Accreditation & Effectiveness Purpose/Mission](#)

Institutional Accreditation and Effectiveness
Administrative Unit Purpose/Mission 7/1/23 - 6/30/24

[1 - Efficient & Effective Operations: The unit establishes and maintains efficient and effective operations, optimizing processes and resources \(budgetary, human, technological, physical\) to achieve targets.](#)

Institutional Accreditation and Effectiveness
Administrative Effectiveness Evaluation Plan & Results 7/1/23 - 6/30/24

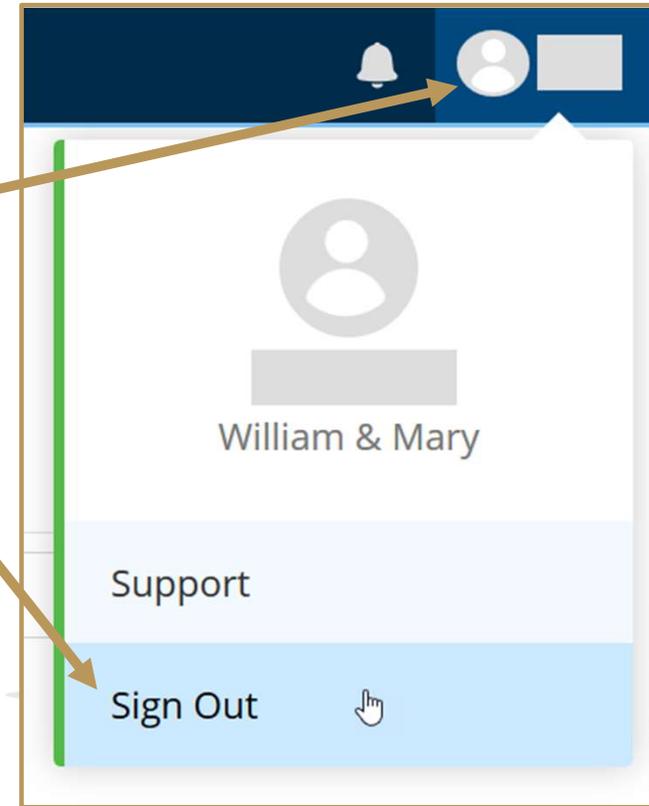
[2 - Quality of Service/Stakeholder Satisfaction: The unit ensures high-quality service delivery and meets stakeholder expectations to achieve targets.](#)

Institutional Accreditation and Effectiveness
Administrative Effectiveness Evaluation Plan & Results 7/1/23 - 6/30/24

6

General Logistics

- Click on your name in the top right corner to **Sign Out of Planning** and the **Anthology** platform.
- Close your browser to fully complete the sign out process.



PURPOSE/MISSION STATEMENT



7

Complete Your Unit's Purpose/Mission

- From the **Plan Items** page, select your unit's **Purpose/Mission Statement** to view and edit.
- The **title** and **general instructions** are displayed at the top of each field. Additional specific instructions/prompts, as applicable, appear inside text boxes.
- Clicking anywhere outside of text boxes will **save** your edits. You will see a green circle with a checkmark to the right of the box.

AY 2023-2024 / ADMINISTRATIVE EFFECTIVENESS EVALUATION (7.3)

Institutional Accreditation and Effectiveness

Plan Items Reports Documents

FILTER Sort Default + Plan Item

Institutional Accreditation & Effectiveness Purpose/Mission

Institutional Accreditation and Effectiveness
Administrative Unit Purpose/Mission 7/1/23 - 6/30/24

Unit Name Purpose/Mission *

Institutional Accreditation & Effectiveness Purpose/Mission

Purpose/Mission Statement
The Purpose/Mission Statement clearly describes the unit within the context of the university and links it to the university's mission.

File Edit View Insert Format Tools Table

Paragraph B I [List Icons] ...

Core Functions
Enter your unit's core functions. What are your main responsibilities for the university? What are the key programs and services for which your office is responsible? What is your reason for being? Core functions can typically be represented in 3-5 succinct statements.

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Paragraph B I [List Icons] ...

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Complete Your Unit's Purpose/Mission

- Click **Done** at the bottom of the page to return to your **Plan Items**.

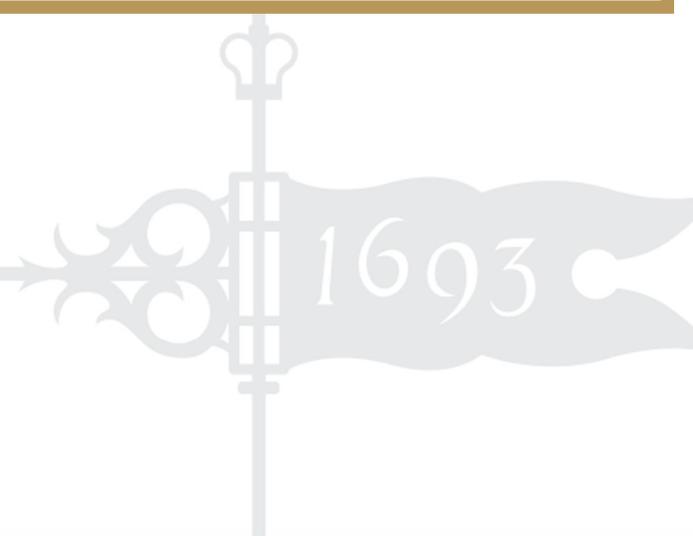


Delete



Done

- **Select** an **Expectation** to begin working on the **Evaluation Plan** or **Sign Out** of Planning and **close** your browser.



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EXPECTATION EVALUATION PLAN



9

Complete Expectation Evaluation Plan

- Your unit will evaluate **Efficient & Effective Operations** (Exp. 1) and **Quality of Service/Stakeholder Satisfaction** (Exp. 2).
- **Expectation Description:** Explain what it is you would like to gain from this evaluation. Please follow the prompts.
- **Participants:** Who will be included in this evaluation?

Expectation Name *
1 - Efficient & Effective Operations: The unit establishes and maintains efficient and effective operations, optimizing processes and resour

Expectation Description
What is your unit/department trying to accomplish? Please describe: 1) one measurable aspect/outcome relating to this expectation that is appropriate for your unit to evaluate this year; 2) why this aspect/outcome is important to evaluate; and 3) how this aspect/outcome relates to W&M's strategic plan, Vision 2026.

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

1) Measurable aspect/outcome relating to this expectation that is appropriate for your unit to evaluate this year:

2) Why this aspect/outcome is important to evaluate:

3) How this aspect/outcome relates to W&M's strategic plan, Vision 2026:

Expectation Evaluation Plan
Complete the fields below, then select "Ready for Review" from the Evaluation Plan Review Status dropdown list.

Participants
Describe who is involved in collecting, reviewing, and analyzing your data/information.

File Edit View Insert Format Tools Table
Paragraph B I [Text Alignment Icons] [List Icons]

10

Complete Expectation Evaluation Plan

- **Data Sources, Collection, & Review Process:** Tell us about the information you plan to collect, how it will be collected, and when. Please follow the prompts.
- **Expectation Achievement Target:** What is the desired outcome or goal of the evaluation? The wording used will allow you to determine if your **target** was “Met,” “Partially Met,” or “Not Met.”

Data Sources, Collection, & Review Process
Describe the data/information sources, collection, and review process: 1) what data/information you will collect and from what sources; 2) how/what methods and when you will collect the data/information; 3) when you will review the data/information and report the results.

File Edit View Insert Format Tools Table

Paragraph B I

1) Data/information you will collect and from what sources:

2) How/methods and when you will collect the data/information:

3) When you will review the data/information and report the results:

Expectation Achievement Target
How will you know that you have met this expectation? Describe the intended qualitative and/or quantitative performance level/outcome of this evaluation.

File Edit View Insert Format Tools Table

Paragraph B I

11

Complete Expectation Evaluation Plan

- **Approximate Start and End Date of the Evaluation:** You can leave the default date if you'd like.

- **Primary Responsible Person & Additional Responsible Person(s):** List the name and job title of the individual in charge of the evaluation. Add any additional person(s) here.

The screenshot shows a web form for creating an evaluation plan. It features two date selection fields, two rich text editors for naming responsible persons, and a list of menu options (File, Edit, View, Insert, Format, Tools, Table) above each editor. Arrows from the text on the left point to the start and end date fields, the primary responsible person field, and the additional responsible person(s) field.

Approximate Start Date of the Evaluation *
You can leave the default 7/1/2023-6/30/2024 if you'd like or provide a more specific range within the academic year that the evaluation will occur.
07/01/2023

Approximate End Date of the Evaluation *
You can leave the default 7/1/2023-6/30/2024 if you'd like or provide a more specific range within the academic year that the evaluation will occur.
06/30/2024

Primary Responsible Person
Provide the name and job title of the main individual in charge of this evaluation.

File Edit View Insert Format Tools Table
Paragraph B I [Text Alignment Icons] [List Icons]

Additional Responsible Person(s)
Enter the name(s) and job title(s) of the individual(s) responsible for aspects of this evaluation process.

File Edit View Insert Format Tools Table
Paragraph B I [Text Alignment Icons] [List Icons]

12

Complete Expectation Evaluation Plan

- **Evaluation Plan Review Status:** Select “**Ready for Review**” in the dropdown box. If you are still editing, select “**Not Ready for Review.**”

Due 10/27/2023.

- **IAE/REVIEWER(S)** will indicate approval (“**Review Complete**” in blue above) or that action is needed after review.

IAE/REVIEWER(S) will also provide feedback on the evaluation plan here.

Evaluation Plan Review Status
Select "Ready for Review" when you have completed your evaluation plan; select "Not Ready for Review" if you are still working on it.

Not Ready for Review

Not Ready for Review

Ready for Review

Resubmitted for Final Review

Review Complete (For IAE/SA Admin Use)

[Blank]

Evaluation Plan Review Comments
IAE/REVIEWER(S): Enter comments related to your review of this expectation's evaluation plan.

File Edit View Insert Format Tools Table

← → Paragraph B I [Text Alignment Icons] [List Icons] [Link Icon]

*Note: Select **Resubmitted for Final Review** from the dropdown above if you are resubmitting the evaluation plan after making updates based on IAE/Reviewer(s) feedback.*

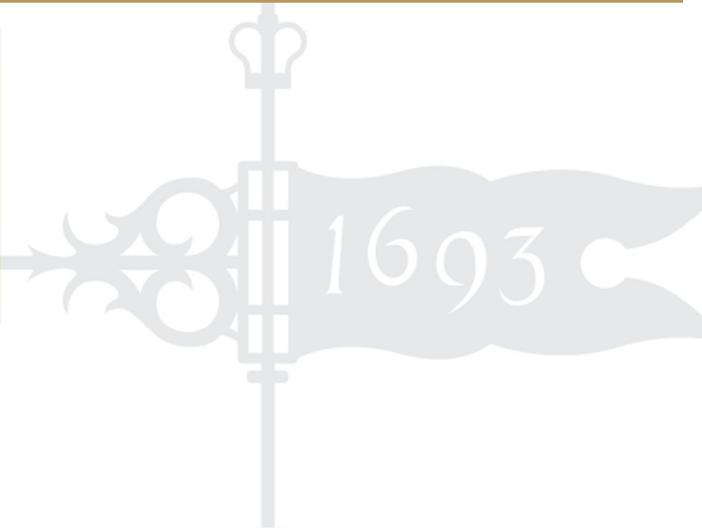
13

Complete Expectation Evaluation Plan

- Click **Done** at the bottom of the page to return to your **Plan Items**.



- **Complete** the next **Expectation's Evaluation Plan** or **Sign Out** of Planning and **close** your browser.



EVALUATION RESULTS & TARGET ACHIEVEMENT



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Complete Evaluation Results & Target Achievement

- **Summary and Analysis of Evaluation Results:** After you have collected and analyzed your data, **summarize** the results of your analysis here.

You may upload supporting documentation by clicking the **+File** or **+Folder** icons.

- **Achievement Target Status:** Set target status dropdown to either “Met,” “Partially Met,” or “Not Met.”

The screenshot shows a web form titled "Evaluation Results and Target Achievement". At the top, it says "After you have collected & analyzed data, complete the fields below, then select 'Submit' from the Evaluation Results Status dropdown list." Below this is a text box with the instruction "Complete the fields below, then select 'Submit' from the Evaluation Results Status dropdown list." The next section is "Summary and Analysis of Evaluation Results", with a sub-instruction: "Summarize in this field the results of your evaluation for this expectation as outlined in your plan above. Include a description of what you evaluated. You may attach full results/reports below the text box." This section contains a rich text editor with a menu bar (File, Edit, View, Insert, Format, Tools, Table) and various formatting icons. Below the editor is a "Plan Item Files" section with the text "There are no attachments." and two buttons: "+ File" and "+ Folder". The final section is "Achievement Target Status", with the instruction "Did you meet this expectation? Select 'Met,' 'Partially Met,' or 'Not Met' from the dropdown list." A dropdown menu is open, showing three options: "Met", "Partially Met", and "Not Met".

Annotations in the image include:

- An arrow pointing from the "Summary and Analysis of Evaluation Results" text to the rich text editor.
- An arrow pointing from the "+File" or "+Folder" text to the corresponding buttons in the "Plan Item Files" section.
- An arrow pointing from the "Achievement Target Status" text to the dropdown menu.

Questions?

Contact
Us



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Mav (mvreyes@wm.edu, 1-1648)