# Getting Started

### Welcome to SPOL Virtual Implementation!

SPOL Virtual Implementation is a joint effort where you and your SPOL Implementation Consultant work together through a series of virtual sessions to build your SPOL system so that it models and supports the institutional effectiveness processes at your institution.

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| **SPOL System Admin** | Person(s) who will be responsible for SPOL long-term. This may include responsibility for ensuring that work is carried out, that reporting is accomplished, and/or that data is maintained. |
| **SPOL Trainer** | Person(s) responsible for training end users, either initially or long-term. |
| **Data Professional** | Person(s) from the institution with the knowledge and authority to pull data from existing ERP systems for inclusion in SPOL. |
| **Clerical Support** | Person(s) responsible for moving records onto Excel spreadsheets, manipulating the spreadsheet data, and/or entering records through the user interface during system set-up. May also include clerical support responsible for module-specific data entry long-term |
| **Assessment Officer** | Person(s) responsible for the Assessment function at the institution. |
| **Faculty Representative** | Faculty member(s) knowledgeable about and engaged in the Assessment function. |

As you and your team begin the implementation process, it is important to give careful thought and consideration to each of your team member’s roles and responsibilities. Please take a moment and become familiar with the Participant Descriptions below.

# Participant Descriptions

Each SPOL Virtual Implementation session is approximately 60 minutes in length. During these sessions, your SPOL Implementation Consultant will seek to learn about your institutional culture, your existing processes, and your institutional goals to determine the optimal way to set up the framework data and your SPOL System.

We take a structured approach during the implementation process of SPOL. Below, this document outlines each session agenda and the homework assignments that will need to be completed after each session. Some assignments will be more time-consuming than others.

# Pre-Training Survey

Please answer the following questions to the best of your ability. Your responses will help guide us through the training process towards a better understanding of your processes and needs. If a specific question is irrelevant to your institution, reply N/A.

# Session 1 of 4 Implementation Questions

1. Describe your assessment process start to finish. Is your process designed primarily to respond to accrediting agencies, or does your process focus more on internal program improvements regardless of accreditation requirements? Which programmatic agencies require assessment reports?
2. Who should have access to the Assessment Module? Program managers, institutional administrators, faculty/staff? As we work through training and implementation, think about who should be able to perform what tasks – creating, writing, editing, viewing – at different points, as you can allow or deny permission to individuals or groups for these activities.
3. How have you been tracking your institution’s assessment activities recently? Are you migrating from an online product to SPOL?
4. If you are migrating from another online product, can you export a spreadsheet of existing programs (we can usually help with the export)?
5. If you are *not* migrating from another online product, how have you been keeping track of assessment activities and producing reports? Are you creating Word or Excel documents which include short explanatory narratives such as action plans?
6. Regardless of how you have prepared reports up to now, provide us with a copy of a recently completed assessment report.
7. Terminology varies from institution to institution, and you can change SPOL’s language to fit your needs. Provide your local terms for SPOL’s “programs,” “service units,” “outcomes,” and “goals.”
8. Do you assess only academic programs or do you also assess support units?
9. If you do not currently assess support units, do you plan to do so in the near future?
10. How do you define a “program” at your institution? Is a program a specific degree, such as “Biology (B.S.)” or a more general degree such as “Bachelor of Science”?
11. Do you consider “concentrations” to be programs?
12. Do you have interdisciplinary degrees or programs?
13. Approximately how many programs are involved in the assessment process?
14. Are program *outcomes* assessed annually, or do they rotate?
15. Who is responsible for assessment within each program? The program director? An assessment coordinator?
16. Do programs have specific annual program *goals* (as opposed to *outcomes*)?
17. If you have the Planning Module, do you want/need to link programs to planning units?
18. If you have the Planning Module, do you want/need to link programs to Objectives?
19. If you have the Accreditation Module, you can link programs to agency standards and criteria. Do you want to link the entire program, or would you prefer to link specific Outcomes?
20. Do you assess at the course level (that is, do your results for programs derive what course-level activities)? If so, can you provide us with a spreadsheet of your course information?
21. How important is it for you to associate specific faculty by ID/name to class sections for reporting? Can you provide us with a spreadsheet of your term registration information that would include faculty ID and what class sections were taught?
22. Individual Document Management fields are available on the Program Details, Outcome Details, Measure Details, and other pages. Consider into which field(s) you want your managers to upload evidence, as the field folders must be built separately.

# Session 1 of 4 Training Curriculum

1. Preparation for Assessment
2. Overview of Assessment Module
3. Assessment Module Homepage
4. Programs v. Service Areas v Courses
5. My Programs
6. Program Detail Page
   1. Program Title
   2. Assessment Type
      1. Academic v. Operational Programs
   3. Program Description
   4. Program Mission Statement
   5. Manager/Members
   6. Associated Planning Units
   7. Program Courses
      1. Sequence
   8. Program Goals
      1. Program Goal Types
   9. Program History
7. Courses
   1. Course Type
   2. Associated CIP Code
      1. CIP Families
   3. Classes
8. Classes
   1. Instructor
   2. Planning Year/Term
   3. Students
   4. Mode of Delivery
9. Faculty
   1. SPOL User
   2. Faculty Rank
   3. Employment Type (Full-time or Part-time)

**HOMEWORK**

1. Populate import files for:
   1. Programs
   2. Courses
   3. Faculty
   4. Additional Users
2. Enter Faculty Ranks and Mode of Delivery

**PARTICIPANTS**

1. Assessment Officer
2. SPOL System Admin(s)
3. SPOL Trainer(s)
4. Data Professional
5. Clerical Support

# Session 2 of 4 Implementation Questions

1. As part of your assessment process, which do you assess*: program level* student learning outcomes, *course level* student learning outcomes, *operational* outcomes (those that do not tie to courses but could track enrollment, for example), *institutional* outcomes (outcomes that all or nearly all academic programs also assess, with program level findings aggregating upward to the institution-wide level), and/or *core/general education* outcomes? You can create each level as an Outcome *Type*.
2. Do you assess service area outcomes?
3. Can you provide us with a spreadsheet of existing outcomes, or will program managers create new outcomes from scratch during the implementation stage?
4. Based on the assessment report you provided us, do you want to re-label any of the fields on the Outcome Details pages? Note that you can have unique templates for Programs and Service Areas.
5. Do you want to use the Gap Analysis and/or SWOT fields on the Outcome Details pages?
6. Although you can associate entire Programs with Accreditation Standards and Planning
7. Objectives, you can also associate Outcomes to Standards and Objectives. Consider whether you want to make the associations at the Program or Outcome levels, or both.
8. Do you collect academic program results at the course and/or section/class level for the student learning outcomes? If so, can you give us a spreadsheet that says which Courses are tied to each Outcome? If you do *not* collect SLO results at least at the course level, you do not need to create detailed Criteria in Session 3.
9. Do your programs and/or service areas use established assessment Measures such as rubrics, surveys, exams, pre/post tests, etc.?
10. Do any of your programs share results? For example, results for an English SLO might also be used for assessment of a Written Communication SLO for the core/general education.

# Session 2 of 4 Training Curriculum

1. Outcome Detail Page
2. Outcome Types
3. Outcome Title
4. Outcome Description
5. Outcome Status
6. Assessed Within a Course
7. Associated Programs
8. Planning Years
9. Courses
   * 1. Skill Levels
10. Program Goals
11. Stakeholders
12. Institutional Goals
    * 1. Institutional Goal Categories
13. Intended Results
14. Status Reports
15. Actual Results
16. Use of Results
17. Document Directory
18. Outcome History
19. Measures
    1. Measure Title
    2. Measure Description
    3. Measure Types
       1. Direct v. Indirect Measures

**Associated Outcomes and Courses**

**HOMEWORK**

1. Edit/Add/Delete records for:
   1. Outcome Types
   2. Outcome Status
   3. Measure Types
2. Populate Import files for:

a. Outcomes

b. Measures

c. Outcomes Course Association

**PARTICIPANTS**

1. Assessment Officer
2. Faculty Representative
3. SPOL System Admin(s)
4. SPOL Trainer(s)
5. Data Professional
6. Clerical Support

# Session 3 of 4 Implementation Questions

1. What measurement tools do you regularly use for assessing Outcomes? Do you use rubrics, exams, surveys, pre/posttests, etc.? Do you use some tools more frequently than others? Are some of these tools used in common between programs (for example, a Written Communication Rubric used for the English, History, Psychology, and Government classes)?
2. If you use multiple rubrics for assessment, do you also have multiple proficiency levels? For example, a rubric for English Composition might have a “exemplary” level of 90-100% while a rubric for a History research paper might say “exemplary” is 80-100%.
3. Please provide us with sample rubrics and/or surveys, which we can create in SPOL as examples for your review.
4. Programs use benchmarks, questionnaires, and analytics (rubrics) as measurement tools, whereas Service Areas use benchmarks, questionnaires, and a rubric matrix (akin to a Likert Scale). Programs only use percentages for targets while Service Areas can use currency, percentages, and numbers. Do you anticipate any difficulties with these restrictions?

# Session 3 of 4 Training Curriculum

1. New Success Criteria Page
2. Criteria Title
3. Criteria Description
4. Criteria Types
   * 1. Benchmark
     2. Questionnaire
     3. Analytic
     4. Rubric Matrix
5. Document Management
6. Criteria Details Page

**HOMEWORK**

1. Populate Import files for:

a. Classes

b. Criteria

**PARTICIPANTS**

1. Assessment Officer
2. Faculty Representative
3. SPOL System Admin(s)
4. SPOL Trainer(s)
5. Data Professional
6. Clerical Support

# Session 4 of 4 Implementation Questions

1. If you are entering results at the Course and/or Class level, who will be entering those results? Individual faculty? An Assessment Coordinator who will aggregate results and enter them as a lump sum?
2. Results can be entered for an entire Course, individual Class sections, or per Student, and each Program has the option on how results are entered. Would you use all three of those options or just one or two?
3. SPOL offers a variety of reports, depending on the level of detail required. What requirements do you have for reports? Do you prefer Word documents, pdf, spreadsheets? Who should be able to run reports (determined by setting Permissions)?

# Session 4 of 4 Training Curriculum

1. Findings Entering Findings
   1. Assessment Data Entry feature v Cascading
   2. Planning Year and Term
   3. Reporting Level (Class v Student)
   4. Date
   5. Notes
   6. Select Class
   7. Sample Size
2. Number Met Finding Details Page
   1. Targets & Actual Results
   2. Difference Score
   3. Met v Not Met
   4. Aggregate Scores
3. Reporting Your Results
   1. Reporting Options
   2. Program Assessment Map
   3. Copy Assessment Data feature

**PARTICIPANTS**

1. Assessment Officer
2. Faculty Representative
3. SPOL System Admin(s)
4. SPOL Trainer

# Notes