

Appendix A: AES Assessment Summary 2023-24

2023-24 Administrative, Educational Support, and Student Support (AES) Assessment Summary

In 2023-24, Commonwealth University (CU) embarked on its second round of AES planning and assessment efforts; however, divisions and units were expected to align to the new CU Strategic Plan that was endorsed by the Senate in September 2023 and Council of Trustees in October 2023. CU's Strategic Plan incorporated the mission, vision, and values that were adopted in 2022-23 and built out core commitments, priorities, goals, and initiatives in 2023-24. Suggested metrics were included in the initial strategic plan framework, but efforts that ensued during the 2023-24 fiscal year brought changes to the final set of metrics and the selection of 22 key performance indicators. While the official endorsement took place in the fall and additional refinement occurred during the year, divisions and units held retreats and planning sessions throughout the summer and fall using the near-final strategic plan framework until it was finalized. No substantive changes were made to the strategic plan as a result of the final endorsements.

During the fall, the administrative units transitioned from Nuventive Improve to the more robust platform, Nuventive Solutions Premier, on which their work would be completed moving forward. All transitional work was completed by Nuventive and Institutional Effectiveness (IE) staff by November 2023 so that divisions and units would be ready to enter results at the end of the 2023-24 year. Two assessment sessions were held in 2023-24 to provide feedback on the 2022-23 AES annual reports and on the Fall 2023 plans submitted in Nuventive and to guide expectations for the coming year. Those expectations included alignment with the Strategic Plan priorities and core commitments (see Figure 1 for alignment and coverage) and a greater focus on measurable goals and targets in lieu of using initiatives/actions as goal statements.

Figure 1: Mapping of Division/Unit Goals to Strategic Plan Priorities/Commitments

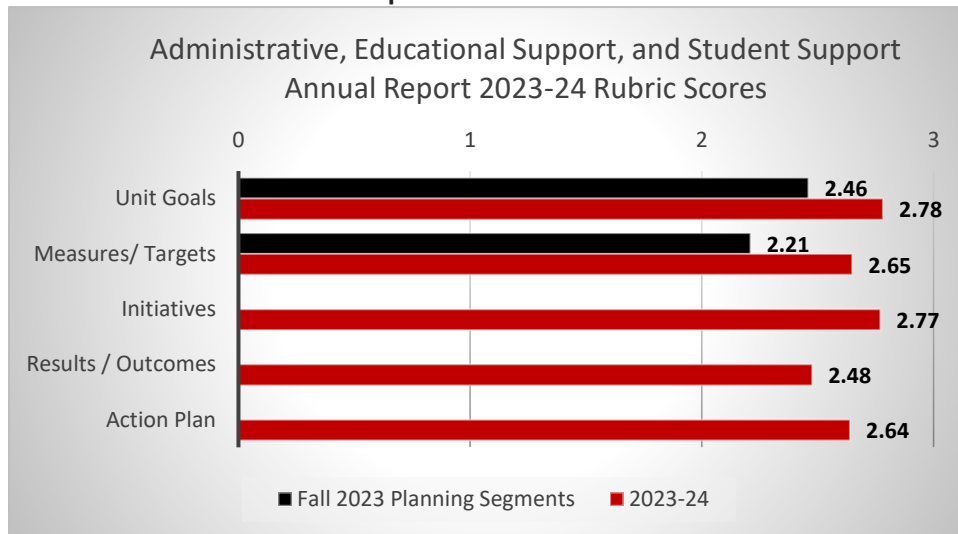


Divisions and units were asked to report in June – July, recognizing that some data would not be available until after the September census date or later for some of the official financial and personnel data. Across CU's AES units, 64/65 programs reported outcomes for a 98% submission rate.

IE staff used a rubric (on a three-point scale) to rate the degree to which programs completed each of the primary segments of the planning process in Fall 2023. As shown in Figure 1 (black bars), overall fall ratings for goals ($x=2.46$) and measures/targets ($x=2.21$) indicated opportunities for improvement in planning processes. This was a formative assessment as feedback was provided to units, and many points of contact (PoCs) either met with IE staff one on one or during divisional/unit retreats and revised their plans. The reviewers offered collegial advice to help improve the process and the quality of

assessment plans according to best practice. The annual reports were submitted and evaluated again at year end. Unit goals and measures/targets ratings increased from fall to spring (Figure 1 red bars) in those categories, showing an improvement in the quality of the planning documents.

Figure 1: Administrative, Educational Support, and Student Support Annual Report 2023-24 Rubric Scores



This report summarizes year-end rubric ratings and comments for all submissions. It also helps to identify general opportunities for improvement in the AES assessment process.

Unit Goals

Last year, many units stated goals that were more so initiatives or actions (e.g., establishing a plan/policy or unifying processes), as mentioned in the introduction. In 2023-24, IE spent a great deal of time in retreats and individual meetings encouraging PoCs to focus on SMART goals, as shown below. Figure 2 shows a slide used frequently in those sessions regarding guidelines on goals, measures, etc.

Figure 2: Session slide on Goals, Measures, Targets, and Initiatives

Articulating Goals, Measures, Targets, and Initiatives

Instructions provided this summer include:

- Develop divisional and unit goals (3-5 goals)
- Consider if these goals appear to be
 - SMART goals
 - Stretch goals
 - Enduring (longer-term) goals (e.g., 5-year goals)
 - Linked to the SP and other key sources
- Identify initiatives that state how you will accomplish goals
- Consider measures / targets against which to evaluate your goals

SMART Goals

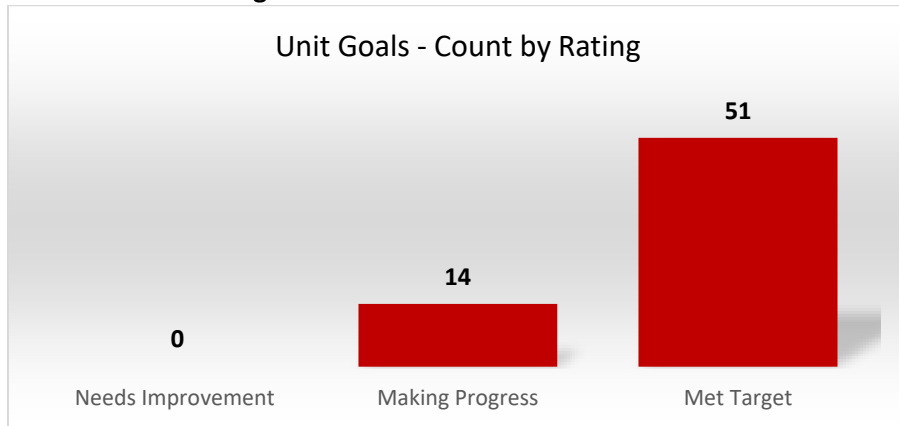
- S Specific
- M Measurable
- A Achievable
- R Realistic
- T Timely

Bloomsburg | Lock Haven | Mansfield

As shown in Figure 1, scores for unit goals as submitted in fall 2023 were on average lower than those reported at year end, showing marked improvement in having more measurable goals and specific targets. The year-end average score for unit goals was $\bar{x}=2.78$ with 78% ($n=51/65$) meeting expectations (See Figure 3). Commonly noted opportunities for improvement for unit goals included comments

about focusing more on outcomes and less on initiatives and having 3-5 goals (some units had fewer than three).

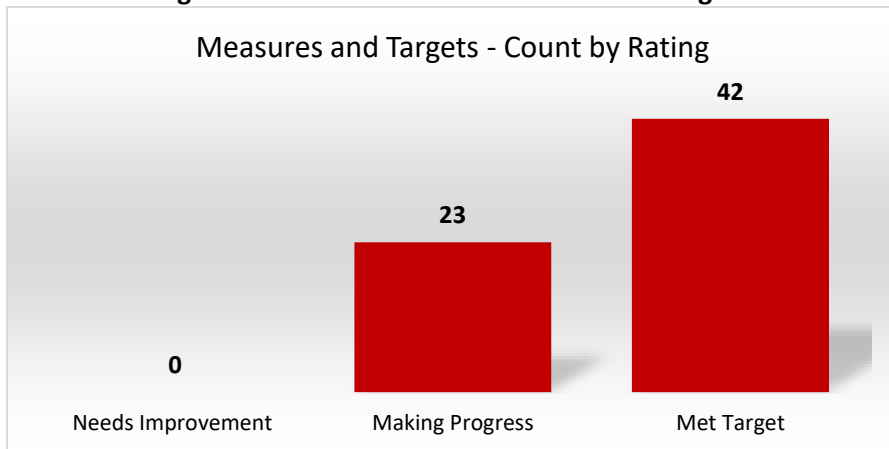
Figure 3: Rubric Scores for Unit Goals



Measures and Targets

PoCs were encouraged to select those measures that would represent the units’ success (not necessarily the easiest to measure). For measures and targets, the year-end average score was $x=2.65$. Greatest opportunities for improvement were shared in comments like: articulate a specific target (e.g., a number or percent increase), again focusing on measurables and not initiatives; ensure measures and targets align with the goals and are consistent with each other (e.g., if the measure calls for a number, then the target should be expressed as a number not percent); and ensure to state (not omit) measures and/or targets. Figure 4 shows the distribution of rubric scores with 65% ($n=42/65$) meeting target.

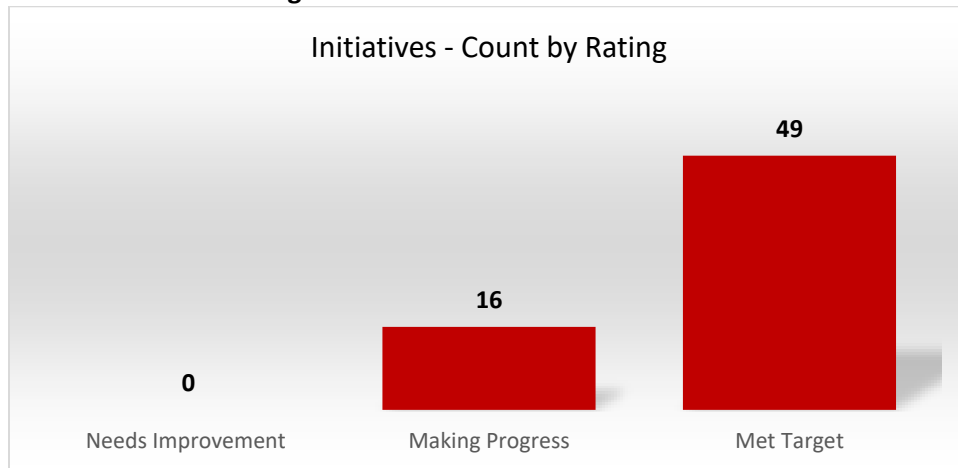
Figure 4: Rubric Scores for Measures and Targets



Initiatives

A section for initiatives was included last year but not part of the scoring. A rubric category for initiatives was added and highlighted in training sessions to explain the importance of stating initiatives that describe how units will accomplish goals and meet targets. The initiatives should provide some guidance on the actions PoCs will take throughout the year to reach goals/targets. On average ($x=2.77$), PoCs did a good job stating initiatives that articulate their pathway to success (see Figure 5) with 75% ($n=49/65$) meeting target. In a few cases, PoCs were encouraged to provide more detailed initiatives.

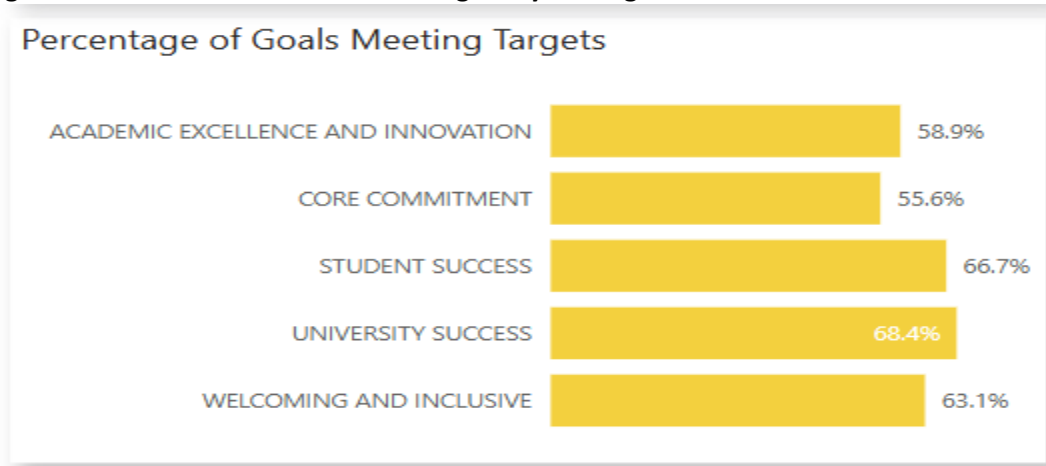
Figure 5: Rubric Scores for Initiatives



Results - Outcomes

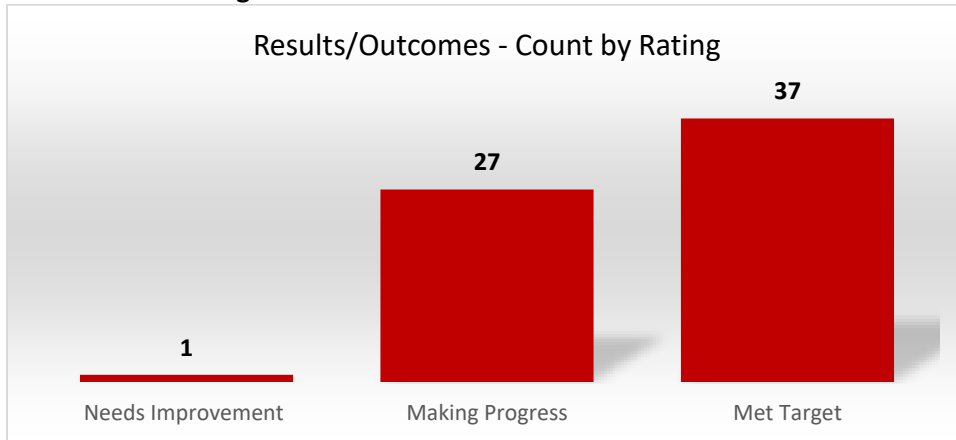
As reported in the Nuventive dashboard, 58.9% to 68.4% of targets were met depending on the priority or commitments (see Figure 6). Some results that could not be reported until census data or official data were available; those results were marked as target not met, which increased the number of unmet targets. In addition, where multiple outcomes were reported collectively in a single module, PoCs would have to report target not met if even one of many outcomes did not meet expectations. As a result, PoCs were encouraged, moving forward, to enter multiple measures/targets separately for each unit goal.

Figure 6: Percent of Goals that Met Targets by Strategic Plan Priorities and Commitments



In terms of reporting results - outcomes, the average score was $x=2.48$ (see also Figure 7) with 57% ($n=37/65$) meeting expectations and 42% ($n=27/65$) making progress. Other comments included adding in unreported outcomes either due to unavailable or insufficient data (usually denoted with a placeholder) or incomplete submissions. In some cases, the outcome reported did not align with the goals, measures, and/or targets.

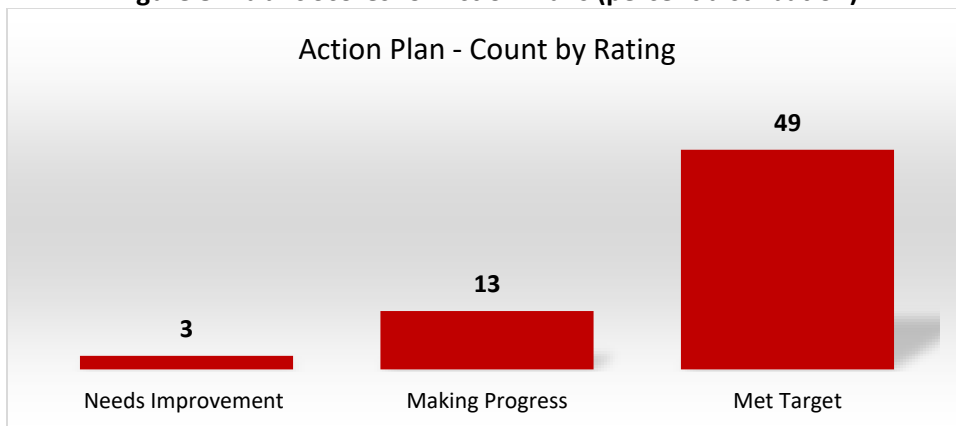
Figure 7: Rubric Scores for Results Outcomes



Action Plans

Nuventive includes a space where PoCs can enter actions for next year as a result of the outcomes and analysis. While the initiatives section should document the data-informed actions (usually in greater detail) for the next year, we kept this feature in Nuventive to prompt PoCs to consider what the data is saying and make some statement about it in preparation for next year’s planning. In the future, we may be able to remove one of these sections, but feel folks need the practice of considering how results will inform change and planned actions. The average rating for action plans was $x=2.64$, meaning most units (75% or $n=49/65$) provided a statement about how the data informs future action (see Figure 8). Comments relating to opportunities for improvement include providing actions that were omitted in part or altogether; sharing a little more detail; and completing actions for areas in which placeholders were entered.

Figure 8: Rubric Scores for Action Plans (percent distribution)



Conclusion

CU's divisions, units, and PoCs have made tremendous progress in conducting planning and assessment to inform change and lead to continuous improvement. We believe the annual reporting process, which allows us to gauge how well our strategic plan is supported and operationalized, will continue to become part of the fabric of what we do. Our approach was to keep it simple and select the most important indicators of success so that we are gauging progress on key drivers for each unit. CU will be working on socializing a program review process, per the BOG Program Review Policy and Procedures, that will integrate with the annual planning and lead to more comprehensive periodic reviews in the future. For now, though, we feel that annual planning and assessment helps us determine the effectiveness of current initiatives, make adjustments, and gain insights that will add value to the more comprehensive reviews.

Standard II: Ethics and Integrity

Ethics and integrity are central, indispensable, and defining hallmarks of effective higher education institutions. In all activities, whether internal or external, an institution must be faithful to its mission, honor its contracts and commitments, adhere to its policies, and represent itself truthfully.

In the team's judgement, the institution appears to meet this standard.

This judgment is based on a review of the self-study report, evidence, and interviews with institutional constituencies to clarify information and verify compliance during the self-study evaluation team visit.

Summary of Findings

The self-study evaluation process thoroughly reviewed CU's ethical policies, institutional practices, and governance structures, supplemented by interviews with multiple CU constituencies to determine compliance with MSCHE Standard II. The Review Team evaluation confirmed that ethics and integrity are core institutional priorities, guiding operations, policies, and interactions with internal and external stakeholders.

CU has demonstrated a commitment to ethics and institutional integrity. It is evident that CU ensures that policies and decisions reflect ethical responsibility and transparency in governance, operations, and academic affairs. University policies and practices are designed to ensure institutional accountability, truthfulness in representation, and commitment to contractual obligations with faculty, students, staff, and external stakeholders. Ethical behavior is institutionalized through some compliance training, policies and guidelines, and several oversight committees that monitor institutional ethics and integrity.

CU actively protects academic freedom in research, teaching, and campus discourse, anchored in policies such as the Faculty Handbook's Academic Freedom Statement and the First Amendment and Free Speech Policy. Faculty retain autonomy in scholarship and pedagogy, while student rights to expression are safeguarded through due process policies and the Student Code of Conduct.

The university fosters an inclusive environment through its DEIB Strategic Plan, guided by hiring guidelines, funding support for student cultural organizations, Title IX compliance, and expanded funding and initiatives to recruit underrepresented student groups. Regular campus climate surveys and focus groups, as well as national surveys such as NSSE, inform policy updates, and faculty and staff undergo training in DEIB principles, supported by clear policies against bias and discrimination.

Grievance procedures for students, faculty, and staff are documented and accessible, offering multiple avenues for resolution, including formal complaints, ombudsperson services, and union grievance processes. CU enforces consistent due process and maintains clarity across all grievance mechanisms. The site visit illustrated the responsiveness of student-facing offices such as the Registrar and IT to student and faculty needs.

CU enforces comprehensive conflict-of-interest policies for faculty, staff, administrators, and trustees. Annual financial disclosures, ethics training, and research oversight ensure transparency in operations, including monitoring of faculty consulting and external employment activities.

CU implements equitable policies in hiring, tenure, admissions, and financial aid, with a post-integration focus on increased student DEIB. While the site visit revealed a faculty union concern with unfilled faculty and staff DEI positions, CU's transparent performance-based faculty evaluation criteria, along with anti-discrimination policies and regular compliance reviews, do demonstrate fairness in institutional decisions.

The university employs strict standards for branding and public information and, as evident in the site visit, has made a real effort to ensure consistent messaging through the Strategic Communications unit, supported by audits and compliance reports to ensure truthful representation of offerings and institutional performance. Stated policies govern marketing, admissions practices, and disclosures to students and stakeholders. The site visit demonstrated the lengths to which CU goes to openly communicate with students at all three institutions, with the student governments playing a strong role.

CU supports affordability through a tuition freeze, financial aid programs, and transparency in cost disclosures. High school partnerships are recently being emphasized, with need-based aid access expanded across the three institutions, while the Foundations at the three institutions have successfully expanded fundraising to support student scholarships, student housing and student-facing services such as athletic stadiums.

The university demonstrates full compliance with regulatory and accreditation requirements through regular audits and documentation. Title IX training, financial aid audits, and governance reviews confirm alignment with both MSCHE and state mandates. During the site visit the Team noted that, as part of its commitment to ethical research practices, CU has processes in place to investigate research misconduct. No research misconduct has been filed with CU; however, a pre-integration IRB research misconduct incident was formally filed and dealt with in-house, demonstrating the institution's adherence to oversight mechanisms and ethical compliance in research governance.

CU uses self-assessments, compliance reports, and stakeholder feedback to guide policy updates. Instruments such as the Ethics and Integrity Self-Assessment, DEIB Climate Action Plan, and governance reviews support the institution's culture of continuous improvement. Opportunities to exist to level up assessment for continuous improvement.

▪ **Collegial Advice**

Based on the institution's self-identified areas for improvement and our review, we offer the following suggestions:

1. Expand external transparency via public dashboards and annual ethics reports, as during the site visit, some staff and students indicated a need for expanded access to such information. Also engage faculty, student, and staff representation governance in shaping institutional policies and communication strategies. The team notes that open sessions demonstrated a disconnect in messaging to students, and some disconnect by staff in perceptions of transparency of communication.
2. Increase visibility and usability of reporting procedures through digital tools. The team notes that representatives from the collective bargaining units expressed discontent

regarding transparency of communications from the administration on issues such as the creation of new colleges and merging of programs without faculty input/consideration, extensive curricular overhauls, the way some programs were placed under review/put under moratorium without allowing time for recruitment, and regarding the closing of the Clearfield campus.

3. Institutionalize a formal ethics and integrity review cycle for continuous evaluation.

Recognition of Accomplishments, Progress, or Exemplary/Innovative Practices

1. CU has demonstrated significant progress in upholding ethics and integrity, particularly through its successful integration of 3 campuses. The university maintains well-documented policies that ensure institutional accountability and compliance. The integration process aligned governance structures, policies, and academic standards across campuses while preserving legacy identities. CU's grievance procedures are accessible and multifaceted, supported by formal reporting tools, and union mechanisms, strengthening institutional trust through enhanced oversight and centralized reporting.
2. CU's DEIB initiatives are data and student driven, shaped by campus climate surveys and compliance assessments, resulting in responsive policies in hiring, programming, and student support. The institution's commitment to inclusive excellence is demonstrated through measurable indicators and continuous policy refinement.
3. Communications, marketing and public representation comply with federal and state guidelines, with regular audits and assessments. Annual effectiveness reports and compliance disclosures reinforce transparency and accountability. The Office of Strategic Communications, despite a small staff, effectively promotes CU's brand and improves the engagement of internal and external audiences.

Standard III: Design and Delivery of the Student Learning Experience

An institution provides students with learning experiences that are characterized by rigor and coherence of all program, certificate, and degree levels, regardless of instructional modality. All learning experiences, regardless of modality, program pace/schedule, and setting are consistent with higher education expectations.

In the team's judgment, the institution appears to meet this standard.

This judgment is based on a review of the self-study report, evidence, and interviews with institutional constituencies to clarify information and verify compliance during the self-study evaluation team visit.

Summary of Findings

CU offers an array of undergraduate, graduate, and professional programs designed to meet the educational needs of students across its Bloomsburg, Lock Haven, and Mansfield campuses. The institution has integrated curriculum from three previously separate institutions, creating a unified academic structure while maintaining campus identities. CU currently offers 54 bachelor's degrees, 21 master's programs, doctoral degrees in audiology and nursing, five associate degrees, 77 minors, 15 certificates, and nine certification programs. These programs are rigorously designed and delivered through both face-to-face and distance education methods and ensures that all learning experiences align with higher education expectations, maintaining consistency and rigor across all modalities and settings.

The institution's General Education program, organized around five curricular themes and 16 learning goals that align with PASSHE requirements and AAC&U essential learning outcomes. During 2022-23, faculty developed, and the University Curriculum Committee (UCC) approved, 377 GE courses, with 29 additional courses approved in 2023-24. This deliberative, data-informed process demonstrates CU's commitment to providing a coherent intellectual foundation for all students. The review team met with the General Education Council and faculty representatives to verify the implementation of the institution's General Education program. The review team found that the University Curriculum Committee provides appropriate oversight of this process, ensuring that courses meet established criteria for inclusion in the GE program. This systematic approach to General Education reflects the institution's commitment to providing students with a coherent intellectual foundation across all programs and delivery modalities.

The review team confirmed through meetings with faculty, department chairs, and academic leadership that the institution employs qualified faculty who undergo rigorous evaluation through comprehensive probationary review, tenure, and promotion processes as mandated by the faculty union. During interviews, faculty members highlighted the thoroughness of the evaluation system, which includes student surveys, peer evaluations of teaching effectiveness conducted by department chairs, and departmental committee and chair assessments of teaching, scholarship, and service. The multi-tiered review process provides meaningful feedback and mentorship to junior faculty while maintaining high standards for instruction.

The team reviewed documentation showing that CU actively supports faculty development through several mechanisms: sabbatical leaves, alternative workload assignments for scholarship and program development, and professional development funds at both the university and college levels. Faculty specifically noted the effectiveness of the Center for Teaching and Learning (CTL) and the Commonwealth Academic Technology Support (CATS). The CTL and CATS programming address diverse faculty and student needs, including workshops on improving DEIB in learning environments, effective advising, managing AI usage, course design, and stress reduction.

The review team observed substantial integration of high-impact practices (HIPs) throughout the curriculum and learning experience during our campus visits. Faculty and administrators provided evidence of implementation of HIPs including first-year seminars, learning communities, undergraduate research opportunities, and study abroad programs. The First-Year Seminar (FYS) has been implemented across all campuses. These practices foster a sense of belonging, improve academic performance, and help students develop critical skills necessary for success in both academic and professional settings. Results from the 2022 NSSE survey indicate that CU students participate in HIPs at rates comparable to or higher than peers, particularly in learning communities and internships.

CU has developed a Program Assessment Review (PAR) process that includes curriculum mapping, student learning outcome assessment, annual reporting, and action plans. This process ensures that learning outcomes are introduced, reinforced, and mastered across the curriculum. The institution has made progress in establishing assessment processes through the PAR in transition (2022-23) and annual report PAR (2023-24) frameworks, now housed in Assessment Management System (AMS).

Multi-modal course offerings have been deployed to leverage faculty resources across campuses and provide access to a broader program array. During discussions with faculty and staff, the review team identified the perception of inconsistencies in implementation across modalities, with instructors reporting varied experiences in delivering multi-modal course offerings. The team agrees with the self-study report's statement that the institution should use assessment data to better understand needs, perceptions, and preferences regarding course modalities to achieve a balanced and effective distribution of modalities across the undergraduate curriculum.

While CU has established a program review schedule and template that aligns with PASSHE's Board of Governors Policy. The program review schedule began in 2024-25 for on-cycle accredited programs and will continue to ensure programs receive comprehensive review at least once every five years. Although the annual PAR process provides valuable information about student learning outcomes, it does not replace the deeper, more holistic evaluation that occurs through a comprehensive program review.

- **Collegial Advice**

Based on the institution's self-identified areas for improvement and our review, we offer the following suggestions:

1. While CU has made progress in understanding student preferences regarding course modalities, we recommend developing a more comprehensive strategy for multi-modal course offerings. This strategy should include specific guidelines for determining which courses and programs are best suited for various modalities, taking into account both student preferences, faculty expertise, and learning outcomes data.
 2. Continue to monitor and address potential equity gaps in access to high-impact practices, particularly for underrepresented student populations. Collecting and analyzing disaggregated data on HIP participation could help identify areas where additional outreach or support might be needed.
 3. As the five-year program review cycle begins, ensure that the process includes robust external input, thorough analysis of student learning outcomes data, and clear mechanisms for translating review findings into actionable improvements.
 4. Some programs have demonstrated the use of assessment results to improve student learning, the system would benefit from more robust mechanisms for tracking improvements across time.
- **Team Recommendation(s)** -None
 - **Requirement(s)** -None

Recognition of Accomplishments, Progress, or Exemplary/Innovative Practices

1. The development and implementation of a unified General Education program across three previously separate institutions represents a significant achievement. The deliberative, data-informed process used to select and implement the program demonstrates exemplary practice in curriculum development.
2. The expansion of educational pathways through articulation agreements and credit for prior learning provides innovative opportunities for diverse learners. The substantial increase in articulation agreements with high schools and career and technical education centers during 2023-24 is particularly noteworthy. These efforts have contributed to a robust and coherent student learning experience that supports student success and aligns with higher education standards.
3. The institution's approach to first-year experience programming, particularly the integration of learning communities and first-year interest groups with the first-year seminar courses demonstrates a best practice that may support student transition and success.

Standard IV: Support of the Student Experience

Across all educational experiences, settings, levels, and instructional modalities, the institution recruits and admits students whose interests, abilities, experiences, and goals are congruent with its mission and educational offerings. The institution commits to student retention, persistence, completion, and success through a coherent and effective support system sustained by qualified professionals, which enhances the quality of the learning environment, contributes to the educational experience, and fosters student success.

In the team's judgment, the institution *appears to meet* this standard.

This judgment is based on a review of the self-study report, evidence, and interviews with institutional constituencies to clarify information and verify compliance during the self-study evaluation team visit.

Summary of Findings

The University provided a comprehensive explanation of the six criteria outlined in Standard IV, offering clear evidence of policies, processes, and procedures that support student success. These included admissions, advising, disability services, counseling, health center operations, retention, transfer, financial aid, credit evaluation, and student record management. The report also addressed student life, Title IX compliance in athletics, institutional review practices, and regular assessment of program effectiveness to enhance the student experience. Interviews with staff confirmed and supported the findings in the report.

The report included accurate and thorough information on expenses, financial aid, scholarships, grants, loans, repayment, and refunds. The University's website also links to detailed information on these areas. Interviews with staff and supervisors from financial aid, the registrar's office, and the foundation indicated a consistent and equitable process across offices. The financial aid appeals process is accessible through an online portal, with oversight provided to ensure students understand the necessary steps for reinstatement. During the student session, students praised the registrar's office for its strong support during the campus integration process.

The University maintains a dual admission program with six community colleges, guaranteeing admission to CU and maximizing transfer credit. Undergraduate transfer students with an associate degree from a regionally accredited institution in a parallel program or under a P2P statewide agreement are awarded full junior standing. Staff overseeing early college and dual enrollment programs reported a well-supported structure, with most early college students attending on-campus or online classes. Approximately 40% of current early college students transition to the University, according to staff interviews.

Orientation, advisement, and counseling services are available to help students navigate their academic journey and improve retention. A summer orientation is hosted for first-year students, and all students are required to take *FYS 100: First-Year Seminar*, a 3-credit general education

course designed to aid in college transition. During the student session, feedback on the course was mixed. Some students found it helpful for building campus connections, while others felt it lacked relevance to their discipline and contributed little to academic success. Staff confirmed the University does not consistently collect student feedback on the course's effectiveness. Several students suggested tailoring the course more closely to degree paths to increase its value.

Interviews with advising staff revealed that advising support can be inconsistent during the summer semester when many faculty are off contract, making it harder for students to reach their assigned advisors. However, staff who assist with advising make efforts to support students during these times. The current advising model is primarily faculty-driven, with staff providing additional support.

The Office of Diversity, Equity, Inclusion, and Belonging (DEIB) leads efforts to recruit and retain a diverse student body, faculty, and staff. Through targeted programming and events, the office fosters an inclusive and equitable campus environment. In staff interviews, the Dean of Students emphasized a commitment to ensuring that, despite campus differences, students receive equitable services across all locations.

Innovative tools and support programs enhance the student experience. The Financial Aid Office recently launched its software platform with a Virtual Advisor (an AI-powered chatbot) to help students with routine inquiries, with staff available to assist with more complex issues. Disability Services offers a Peer Monitoring Program designed to build community, support student transitions, and promote self-growth and accountability. Counseling Services are available at all campuses, addressing students' physical and mental health needs.

Career and professional development are integrated with alumni engagement through the Alumni & Professional Engagement (A&PE) unit. The *Professional U* career community provides students with career education, networking, internships, a leadership boot camp, and job opportunities.

Four-year graduation rate data for CU overall (including the three campuses and all locations) for the 2018-2020 entering cohorts shows an average of 42.6%, compared to the national average of 49%. Six-year graduation rates for entering cohorts 2016-2018 show an average of 55.0%, slightly below the national average of 65%, though still within a comparable range. Second-year retention data for entering cohorts 2021-2023 is available, showing an average rate of 75.3%, close behind the national average of 78% for fall 2022. The university also tracks graduation and retention rates for Underrepresented Minority (URM) and Pell-eligible students.

There is evidence of periodic assessment of programs supporting the student experience. The self-study included excerpts from annual reports across key areas such as admissions, student affairs, enrollment marketing, financial aid, the registrar's office, student engagement, tutoring, and student success. The Office of Institutional Effectiveness (IE) provides training, mentoring,

and a user guide for annual reporting, along with feedback using a rubric to improve assessment practices. A review of administrative unit reports confirmed a consistent and embedded process for setting goals, measuring outcomes, and using data to drive continuous improvement.

Administrative, educational, and student support units set measurable goals at the beginning of each planning cycle and report results at year-end through CU's AMS, which streamlines assessment and reporting. The University also participates in the National Survey of Student Engagement (NSSE), which previously varied by campus but will now be administered institution-wide on a three-year cycle.

To further assess operations, the University engaged Ruffalo Noel Levitz (RNL) for a review of organizational and operational practices. RNL provided recommendations in areas such as recruitment and student success, and the University has taken steps to implement these suggestions. The self-study highlighted continuous improvement priorities, including updating Student Affairs policies through a DEIB lens, ensuring consistent policy application across campuses, and refining University web content in 2024–2025 to ensure accurate, accessible information for all stakeholders.

Collegial Advice

1. Adopting a true dual advising model—with clearly defined roles for faculty and staff—could enhance support for students across multiple campuses. Additionally, implementing a one-stop model for student support services may improve the overall student experience beyond what is currently offered.
2. Increasing both the frequency and variety of direct evaluations of student support service offices could provide valuable feedback from students. This information would support ongoing assessment efforts and inform best practices for continuous improvement in student services.
3. The University could consider re-evaluating the First-Year Seminar course and its impact on the student experience. Aligning the course more closely with students' academic pathways may increase its relevance and effectiveness. The possibility of returning to the previous co-teaching model—in which faculty and student services/student affairs staff jointly facilitated the course—could also strengthen collaboration and better support students in transitioning to college life.

- **Team Recommendation(s)** *None*
- **Requirement(s)** *None*

Recognition of Accomplishments, Progress, or Exemplary/Innovative Practices

1. The University should be commended for successfully managing the complex and time-sensitive integration of three college systems and campuses. Throughout this process, the University maintained each campus's unique identity while continuing to deliver uninterrupted student support services.
2. The University deserves recognition for its robust network of specialized student services that support both struggling and high-achieving students across all three campus locations. These services include the Care Team, Health Services Centers, Disability Services, Workforce Development, the Honors College, Alumni Associations, and the Foundations.

Standard VI: Planning, Resources, and Institutional Improvement

The institution's planning processes, resources, and structures are aligned with each other and are sufficient to fulfill its mission and goals, to continuously assess and improve its programs and services, and to respond effectively to opportunities and challenges.

In the team's judgment, the institution appears to meet this standard.

This judgment is based on a review of the self-study report, evidence, and interviews with institutional constituencies to clarify information and verify compliance during the self-study evaluation team visit.

Summary of Findings

CU's integration process reflects a clear, aligned, and inclusive approach, underscoring a strong commitment to institutional improvement. The integration itself represents a significant and intentional effort to enhance the institution. Evidence from the self-study report, supporting documents in the evidence inventory, and the team's conversations with representatives from planning, finance, and institutional effectiveness offices indicates that CU has established effective, system-wide planning processes that integrate financial management, strategic planning, and institutional effectiveness across all campuses.

Evidence from the self-study and staff interviews indicates that the institution has sufficient human and financial resources to carry out its educational mission. While financial challenges continue to affect public higher education broadly, CU is currently demonstrating a sustainable approach across all campuses.

CU's fundraising and development efforts are particularly noteworthy, especially those focused on supporting enrollment and retention through student scholarships and targeted capital projects. To date, CU has raised approximately 100 million toward its campaign.

CU has successfully reduced its annual E & G deficit from \$32.6 million FY 23-24 to a projected deficit of \$14.6 million in FY 24-25. Current projections show that the E & G deficit will be reduced further to approximately \$8.9 million by 25-26. While CU still maintains a cash reserve, it has been steadily declining since the integration—an issue noted by the University's finance staff. Finance staff also raised concerns about the extensive physical footprint of the three campuses relative to the current student population. In response, planning and discussions are underway to address this imbalance, with the aim of eventually reducing annual operating costs by an estimated \$5–6 million.

CU faces several challenges stemming from ongoing enrollment declines across all three campuses. A key issue was a miscalculation of enrollment figures (overstating early college students in headcount enrollment projections), which resulted in overly optimistic projections

and inaccurate financial forecasts. Although these errors have since been corrected, current projections still indicate a continued decline in student enrollment.

Stakeholder feedback on enrollment has varied, with both optimistic and pessimistic viewpoints expressed. However, the overall situation remains uncertain and will take time to fully evaluate.

CU undergoes annual independent audits to confirm its financial viability, with well-documented follow-up on any issues identified in the accompanying management letters. Additionally, the University carries out thorough unit-level assessments across academic and administrative areas, supported by continuous data collection and analysis aligned with the requirements of this standard. Further evidence, including documentation of university-wide committees and leadership structures, demonstrates that a strong framework is in place to support effective institutional planning and ongoing assessment.

- **Collegial Advice**

1. The numerous unit-level reports filed through the AMS do a good job of tying actions within administrative units to strategic goals and priorities. However, it is usually less than clear how the assessment results included in these reports are used to inform changes, including resource allocation. We suggest that these reports more directly connect the data they collect to both resource allocation and improvement – especially at the unit level, especially after the program review process is underway. CU has been doing so much so well at the institutional level that they will need to make a convincing pivot to the kind of unit-level changes they will need to focus on now that the integration enters a period of maturity.
2. With the enrollment decline that led to the integration process in the first place far from over, CU leaders will need to keep a close eye on enrollment numbers and factors associated with their increase and decrease. While striving to enhance institutional stability and improvement across all areas, as well as to stabilize enrollment, leadership should also implement a contingency planning process to ensure that students are not adversely affected.
3. Create a data governance council which includes stakeholder groups across the institution. This council would be responsible for creating comprehensive policies and processes around data management, including defining data roles and responsibilities, establishing data policies, and providing professional development on data literacy programs.

- **Team Recommendation(s)** *None*

- **Requirement(s)** *None*

Recognition of Accomplishments, Progress, or Exemplary/Innovative Practices

1. The work carried out by large numbers of administrators, staff, faculty, and students at CU's three campuses, and together, to re-imagine the university as a single comprehensive entity – including in its mission, values, vision, strategic planning priorities, goals, and metrics, are extremely impressive, including in numerous areas directly related to this standard and its criteria.
2. We are especially impressed by the integrated process for mission development, strategic planning, and the creation of the many budgeting, planning, and financial processes necessary to integrate the three campuses into CU.

Standard VII: Governance, Leadership, and Administration

The institution is governed and administered in a manner that allows it to realize its stated mission and goals in a way that effectively benefits the institution, its students, and the other constituents it serves. Even when supported by or affiliated with governmental, corporate, religious, educational system, or other unaccredited organizations, the institution has education as its primary purpose, and it operates as an academic institution with appropriate autonomy.

In the team's judgment, the institution *appears to meet* this standard.

This judgment is based on a review of the self-study report, evidence, and interviews with campus constituencies to clarify information and verify compliance during the self-study evaluation team visit.

Summary of Findings

CU demonstrates compliance with Standard VII, encompassing governance, leadership, and administration, by establishing a clear and inclusive governance structure. CU's approach to governance is characterized by an articulated shared governance model that engages faculty, staff, students, and administration in decision-making processes. This governance framework involves key stakeholders, including the Board of Governors (BOG), the Council of Trustees (COT), and the administration, supporting CU's mission and goals and ensuring accountability.

The self-study evaluation confirmed CU's adherence to the standard's criteria, including the establishment of a legally constituted governing body, effective leadership appointment and evaluation processes, and the maintenance of autonomy. While evidence indicated effective communication channels among constituencies fostering trust and collaboration, meetings with faculty, staff, and students highlighted a need for improved and enhanced communication that is responsive to feedback within these processes.

Building on this foundation, the institution is governed by a legally constituted body that serves the public interest and ensures the fulfillment of CU's mission and goals. This governing body holds fiduciary responsibility for the institution, overseeing academic quality, planning, and fiscal well-being. Members possess the independence and expertise necessary to maintain institutional integrity, free from political or financial influences. The governing body is also informed by principles of good practice in board governance and complies with a written conflict of interest policy to ensure impartiality. This adherence to good governance practices helps maintain trust and accountability within the institution.

Furthermore, the governing body does not interfere with the day-to-day operations of the university. Instead, it focuses on policy-level oversight of teaching quality, degree program approvals, personnel policies, and fiscal management. The governing body previews audited financial statements and other documents related to the institution's fiscal viability. This oversight ensures financial integrity. Additionally, the governing body appoints and regularly

evaluates the performance of the Chief Executive Officer (CEO), ensuring that leadership remains effective and aligned with the institution's goals.

In this context, CU's CEO is appointed by, evaluated by and reports to the governing body, holding the necessary credentials and professional experience to fulfill the institution's mission. The CEO possesses the authority needed to develop and implement institutional plans, manage resources, and lead the university effectively. Supported by qualified administrators, the CEO is also responsible for assessing organizational efficiency and effectiveness.

Moreover, the CEO has the authority and autonomy to fulfill the responsibilities of the position, including developing and implementing institutional plans, staffing the organization, and directing the institution toward its goals. This autonomy is essential for effective leadership and decision-making.

The CEO is supported by qualified administrators sufficient in number to discharge duties effectively and is responsible for establishing procedures for assessing the organization's efficiency and effectiveness. This support structure ensures that the CEO can focus on strategic leadership while the administration handles operational tasks.

Transitioning to the administration, CU features a well-documented organizational structure across the three integrated institutions, that clearly defines reporting relationships. It is appropriately sized and staffed with individuals who have relevant experience and credentials aligned with the university's mission. Regular engagement with faculty and students, albeit often through top-down, one way communication, is emphasized to advance institutional goals, alongside assessment procedures for evaluating administrative units.

Lastly, CU recognizes the importance of periodic assessments of governance, leadership, and administration effectiveness. This ongoing evaluation process ensures that the institution remains responsive to its mission and the needs of its constituents. By adhering to these standards and criteria, CU ensures effective governance, leadership, and administration that support its mission and benefit its students and other constituencies.

- **Collegial Advice**

1. Develop succession plans for key leadership positions to ensure continuity and stability.
2. Shared governance structures and processes should be reviewed annually to assess their effectiveness and responsiveness to the institution's needs. To close the assessment loop, findings from these reviews should inform necessary adjustments and improvements.
3. To enhance the functioning of shared governance, CU could implement regular training sessions for all stakeholders to further clarify roles, responsibilities, and processes. This would strengthen understanding and engagement across the university community.
4. CU should refine its shared governance structures and processes to reflect the integration and ensure effective communication and collaboration among all constituencies.

- **Team Recommendation(s)** *None*

- **Requirement(s)** *None*

Recognition of Accomplishments, Progress, or Exemplary/Innovative Practices:

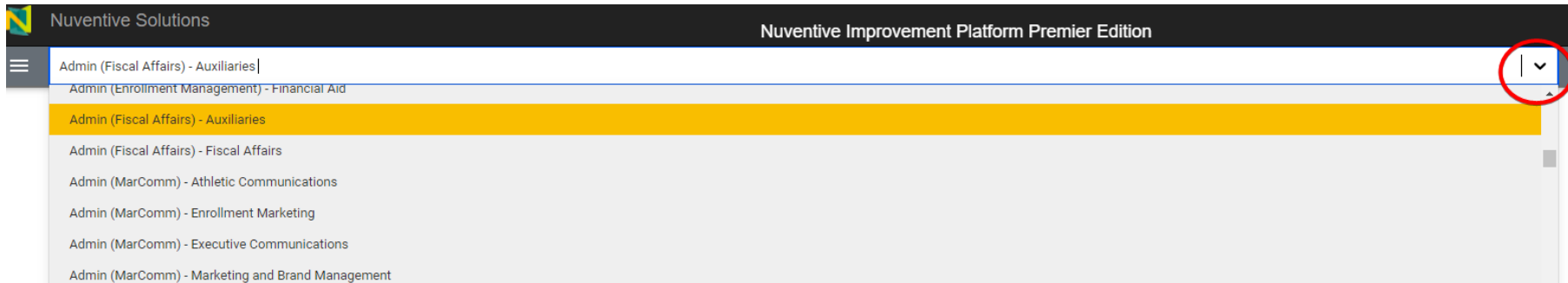
Integrating three distinct institutions into a single entity was an extraordinary feat of leadership, administration, and governance. This monumental task required immense dedication, collaboration, and resilience from the entire campus community.

Appendix C: Nuventive Solutions Premier User Guide - Administrative Units

Nuventive Solutions Premier – User Guide Administrative Divisional/ Unit Plans and Results

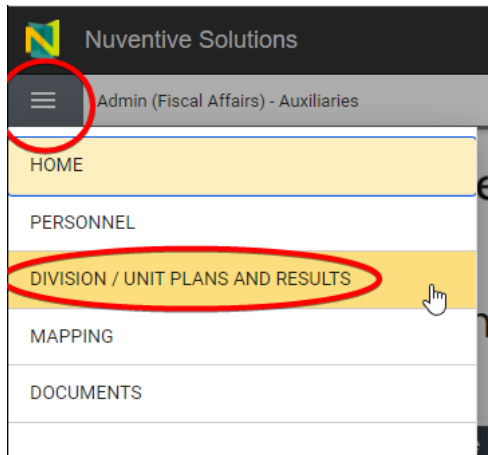
Log in and Select your Unit

- Click on the link: <https://solutions.nuventive.com/> and enter the Nuventive Solutions Premier platform using your CU SSO.
- Select your unit from the dropdown menu in the middle top of the screen



Enter/revise/discontinue Goals, Initiatives, Measures, and Targets


- Use the tabs on the left navigation bar to select **Division / Unit Plans and Results**





- **Add/revise/discontinue a goal/initiatives**

- Click on the **green plus icon “+”** on the far right of the header row to add a goal OR click **three vertical dots** to the far right of the **GOAL NAME** and open the goal you wish to edit/report results.

DIVISION / UNIT PLANS AND RESULTS

Strategic Plan Click here to add a new goal 

Goal Status View All | ▼ Goal Year(s) View All | ▼ Showing 5 of 5

 **Aux Service Budget Gap Reduction** C. Myers 11/15/23 

Unit Goal
Reduce FY24 operational budget gaps by 10% for Auxiliary Services that have revenue to expense deficits. Click here to open a current goal

Goal Status
Active

Goal Year(s)
2023 - 2024, 2024 - 2025

- Click the **UNIT GOAL TAB**, add/revise the **Goal name, Unit Goal, Goal Status, Goal Year(s), Initiatives, or other fields** as needed.
- Make a goal inactive, if needed, by selecting **Goal Status** and using the dropdown to choose complete, inactive, or on hold as appropriate
- Add relevant **Goal Year(s)** for enduring goals that span multiple years
- Label **Initiatives** with the appropriate year (e.g., 2023-24, 2024-25)
- Click **Save**, the green button at the top of the screen, when finished and **Close**

DIVISION / UNIT PLANS AND RESULTS Close Save

Q Aux Service Budget Gap Reduction

UNIT GOAL
 MEASURES
 RESULTS / OUTCOMES

* denotes a required field.

Goal Name *
Aux Service Budget Gap Reduction

Unit Goal *
Reduce FY24 operational budget gaps by 10% for Auxiliary Services that have revenue to expense deficits.

Goal Status
Active | v

Goal Year(s)
2023 - 2024 x 2024 - 2025 x | v

Initiatives ⓘ
2023-2024:
IDENTIFY INITIATIVES

Additional Resources Needed ⓘ

Start Date

End Date

Annotations:

- Use these tabs to switch between goals, measures, and results
- Use these drop downs to change goal status and to select goal year(s)
- Use this drop down to quickly navigate between goals

- **Add/revise/discontinue measure/target**

- If revising or adding a new measure and/or target, click the **MEASURES** tab. Click on the **green plus icon “+”** on the far right of the header row to add a new measure or click on the **three vertical dots** to the far right of the goal name to edit measures/targets

The screenshot displays a software interface for managing measures. At the top, a dark green header bar contains the text "DIVISION / UNIT PLANS AND RESULTS" on the left and "Close" and "Save" buttons on the right. Below this, a search bar contains the text "Aux Service Budget Gap Reduction". Underneath the search bar, there is a "Measure Status" section with a "View All" button and a dropdown arrow. A navigation bar below that features three tabs: "UNIT GOAL" (with a square icon), "MEASURES" (with a circle icon and highlighted in green), and "RESULTS / OUTCOMES" (with a circle icon). To the right of the "MEASURES" tab is a green plus icon (+) with a callout bubble that says "Click here to add a new Measure". Below the navigation bar, a list of measures is shown. The first measure is "Compare submitted budget value to FY24 year-end value" with a three-dot menu icon to its right. A callout bubble points to this icon with the text "Click here to open a current Measure". The user's name "J. McCormack" and the date "10/18/23" are visible in the bottom right corner of the list area.

- Add/revise the **Measure Status, Measure, Target(s), or Notes**. The target should be specific and measurable to identify the criteria for success of this particular goal (e.g., increase participation or completions by 5%)
- Make a measure inactive, if needed, selecting **Measure Status** and using the dropdown to choose inactive as appropriate
- Click on the **green plus icon “+”** under **Related Documents** to link supporting documentation (e.g., survey or assessment instrument, etc.)
- Click **Save**, the green button at the top of the screen, when finished and **Close**

DIVISION / UNIT PLANS AND RESULTS
Close Save ▾

Aux Service Budget Gap Reduction

Unit Goal: Reduce FY24 operational budget gaps by 10% for Auxiliary Services that have revenue to expense deficits.

Goal Year(s): 2023 - 2024, 2024 - 2025

Initiatives: 2023-2024;
IDENTIFY INITIATIVES

Hide Details ▾

* denotes a required field.

Measure Status *
Active ▾ Use this dropdown to change Measure status

Measure *
Compare submitted budget value to FY24 year-end value

Target(s)
10% reduction in deficit gap

Notes

Related Documents

Document Name	Document Description	
There are no documents attached		

Click here to link your supporting documents +

- **Add/revise results**

- Click the **RESULTS/OUTCOMES** tab. Click on the **green plus icon “+”** on the far right of the header row to add a new result/outcome or click on the **three vertical dots** to the far right to open/edit results/outcomes

The screenshot shows a software interface for managing budget results. At the top, a dark green header contains the text 'DIVISION / UNIT PLANS AND RESULTS' and buttons for 'Close' and 'Save'. Below this is a search bar with the text 'Aux Service Budget Gap Reduction' and a dropdown arrow. A blue callout box points to the search bar with the text 'Use these dropdowns to filter Results'. Below the search bar are three filter sections: 'Measure Status' with a 'View All' button and a dropdown arrow, 'Reporting Period' with a 'View All' button and a dropdown arrow, and 'Conclusion' with a 'View All' button and a dropdown arrow. To the right of these filters, it says 'Showing 1 of 1'. Below the filters is a navigation bar with three tabs: 'UNIT GOAL' (with a square icon), 'MEASURES' (with a circle icon), and 'RESULTS / OUTCOMES' (with a circle icon and a green background). A blue callout box points to the 'RESULTS / OUTCOMES' tab with the text 'Click here to add a new Result'. Below the navigation bar is a section titled 'Compare submitted budget value to FY24 year-end value'. Below this title is a list item: '2022 - 2023: Target Met'. A blue callout box points to the right side of this list item with the text 'Click here to open a Result'. To the right of the list item is a green plus icon and a vertical ellipsis icon. Below the list item is a table with three columns: 'Result / Outcome', 'Sample', and 'Action Plan For Next Year (Initiatives)'. The table is currently empty.

- Edit/enter the **Result/Outcome Date**, **Reporting Period**, **Result/Outcome** (enter data and any explanatory narrative), **Conclusion** (Target met/target not met), and **Action Plan for Next Year** (be certain to enter high-level, data-driven actions based upon the results/outcomes)
- Click on the **green plus icon “+”** under related documents to link supporting documentation (e.g., survey results, spreadsheets, etc.)
- Click **Save**, the green button at the top of the screen, when finished and **Close**

DIVISION / UNIT PLANS AND RESULTS
Close Save ▾

Aux Service Budget Gap Reduction

Unit Goal: Reduce FY24 operational budget gaps by 10% for Auxiliary Services that have revenue to expense deficits.

Goal Year(s): 2023 - 2024, 2024 - 2025

Initiatives: 2023-2024:
IDENTIFY INITIATIVES

Measure: Compare submitted budget value to FY24 year-end value

Target(s): 10% reduction in deficit gap

Hide Details ▾

Use this to show or hide details

RESULTS / OUTCOMES

* denotes a required field.

Result / Outcome Date *
11/17/2023

Reporting Period *
2022 - 2023 ▾

Use the dropdowns to change Reporting Period and Conclusion

Result / Outcome *
Sample

Conclusion *
Target Met ▾

Action Plan For Next Year (Initiatives)

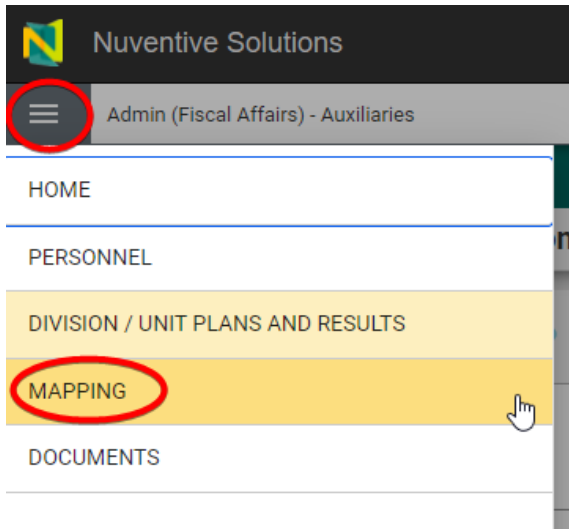
Related Documents

Document Name	Document Description
There are no documents attached	

Click here to link supporting documents



+

Mapping (click on “**Mapping**” on the left navigation bar)



- Click in each table cell where the **Strategic Priorities and Core Commitments** (in column) map to the **Unit Goals** (in header row)
- Click **Save**, on the green bar at the top of the screen, when finished and **Close**

MAPPING

Click here to show or hide helpful hints  

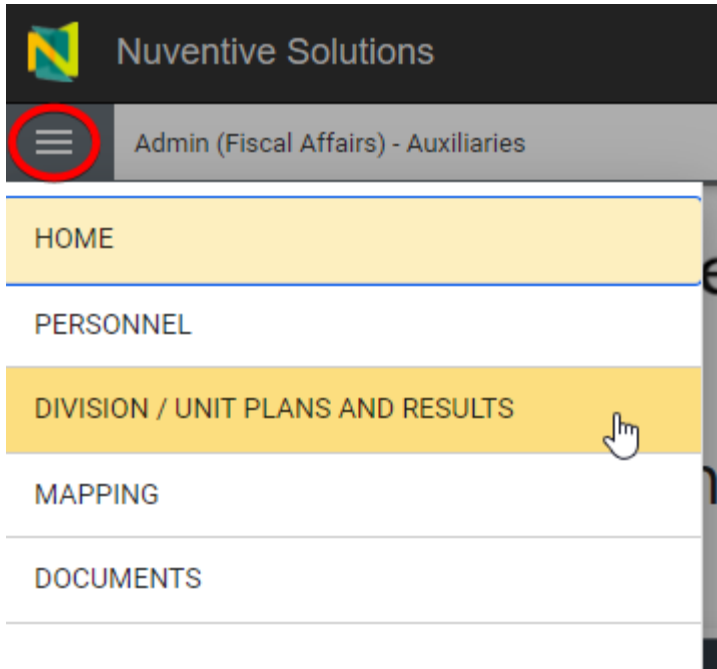
- Strategic Priorities and Core Commitme... | Strategic Plan
M - Mapped

Search by Keyword	Aux Service Budget G...	CWU voluntary meal p...	Student Government F...	Operational Model	Common Set of Auxili...
ACADEMIC EXCELLENCE AND INNOVATION: Academic Offerings and Experience...	M	M	M	M	M
ACADEMIC EXCELLENCE AND INNOVATION: Pedagogy	M	M	M	M	M
ACADEMIC EXCELLENCE AND INNOVATION: Student-Faculty Engagement	M	M	M	M	M
ACADEMIC EXCELLENCE AND INNOVATION: Employee Professional Development	M	M	M	M	M
STUDENT SUCCESS: Accessible and Affordable	M	M	M	M	M
STUDENT SUCCESS: Networking, Mentoring, and Career Readiness	M	M	M	M	M
STUDENT SUCCESS: Holistic Student Services	M	M	M	M	M
STUDENT SUCCESS: Student-to-Alumni Transition	M	M	M	M	M
STUDENT SUCCESS: Financial Literacy	M	M	M	M	M
UNIVERSITY SUCCESS: Connect Outcomes to Fiscal Decision-Making	M	M	M	M	M

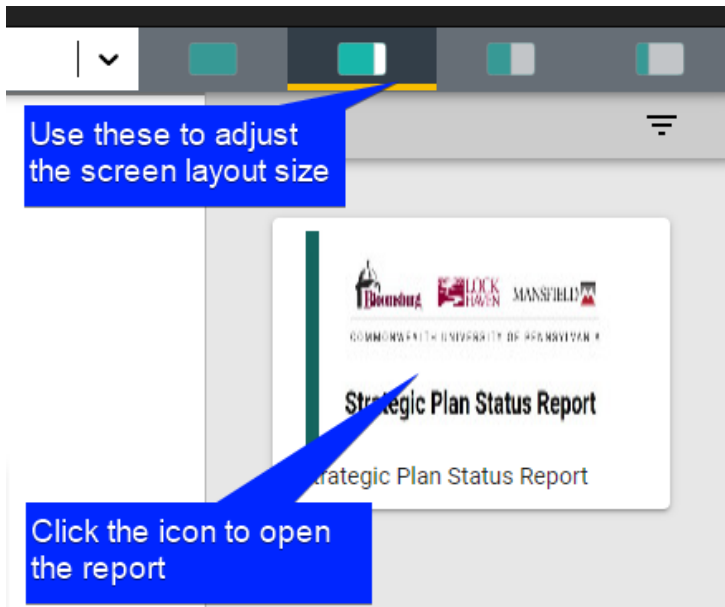
Click the cells to map

Reporting

- Use the tabs on the left navigation bar to select **Home** or **Division / Unit Plans and Results**



- Click on the Report Icon at the right side of the split screen



- Select appropriate **Goal Status** and **Goal Year(s)/Reporting Period** from the dropdowns
- Click the green **Run Report** button which should generate your report.

The screenshot shows a web interface for report settings. At the top right, there are icons for refresh, download (ZIP), information, menu, and close. A blue callout box points to these icons with the text: "Use these icons to refresh, download a zip file or close the report". Below this is the "Report Settings" section, which includes a green "Run Report" button circled in red. The "Report Module #2 Parameters" section contains two dropdown menus. The first is labeled "Goal Status" and has a "View All" button and a dropdown arrow. A blue callout box points to this dropdown with the text: "Use the dropdowns to filter by Goal Status or Years." The second dropdown is labeled "Select Goal Year(s) / Reporting Period" and also has a "View All" button and a dropdown arrow.




- Download the report if you wish.

Report last run 11/17/2023 9:45 AM

Download as a Word document

Accessibility Mode Download Save a copy to OneDrive. Print

Download as a PDF

COMMONWEALTH UNIVERSITY OF PENNSYLVANIA

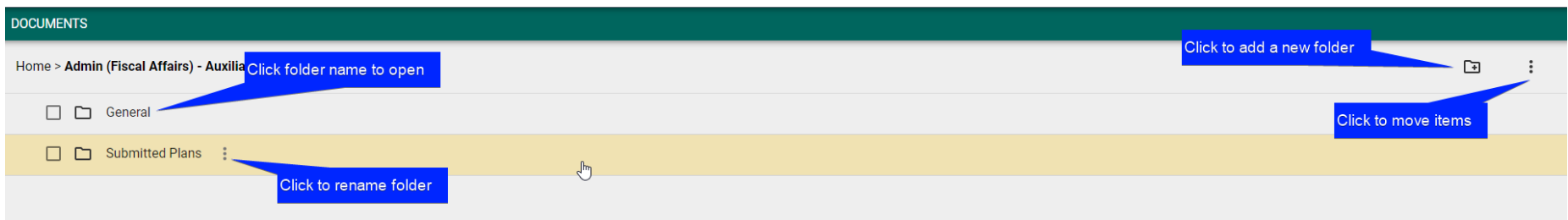
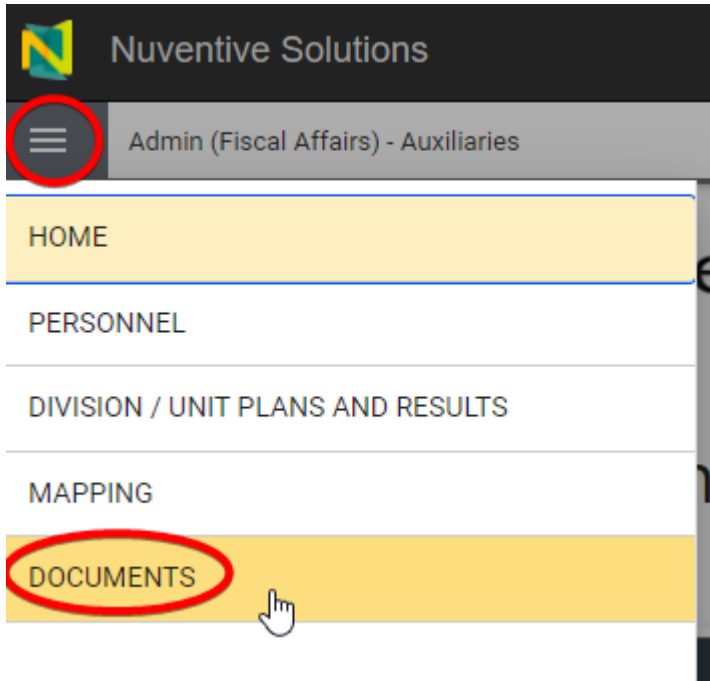
Strategic Plan Status Report

Admin (Fiscal Affairs) - Auxiliaries

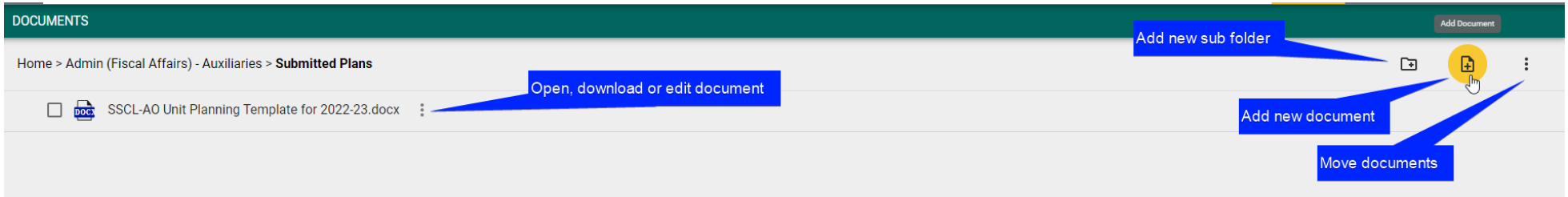
Find
Immersive Reader
Translate
Download as PDF
Embed
Help
Accessibility Help (Alt+Shift+A)
Give Feedback to Microsoft
Terms of Use
Privacy and Cookies

Documents (click on **Documents** on the left navigation bar)

- Select **Document Repository** from the left navigation bar



- Click on the paper plus icon “+” on the far right to **Upload New Document**



- Browse, select file (supporting documentation), and click the green **Save** button

Add Document(s) to Submitted Plans

Choose Files Screenshot... 081717.png

Name *
Screenshot 2023-11-17 081717.png

Description

** denotes a required field.*

CANCEL X **SAVE** 

- Under the **Division Unit Plans and Results** area, you can link documents in the **Measures** and **Results / Outcomes** tabs

DIVISION / UNIT PLANS AND RESULTS Close Save

Aux Service Budget Gap Reduction

Unit Goal: Reduce FY24 operational budget gaps by 10% for Auxiliary Services that have revenue to expense deficits. Hide Details

Goal Year(s): 2023 - 2024, 2024 - 2025

Initiatives: 2023-2024:
IDENTIFY INITIATIVES

** denotes a required field.*

Measure Status *
Active


Measure *
Compare submitted budget value to FY24 year-end value

Target(s)
10% reduction in deficit gap

Notes

Related Documents

Document Name	Document Description
There are no documents attached	

Click here to link a document 

- Navigate to the document. Hit **Attach** in the upper right corner to relate the document

The screenshot shows a web interface for a Document Repository. At the top left, the text "Document Repository" is displayed. In the upper right corner, there is an "ATTACH" button with a plus icon, a folder icon, and a close icon. A blue callout box points to the "ATTACH" button with the text "Click here to attach the document". Below the header, a breadcrumb trail shows a home icon followed by "ADMIN (FISCAL AFFAIRS) - AUXILIARIES" and "SUBMITTED PLANS". A horizontal line separates the header from the content area. In the content area, there is a yellow checkmark icon, a document icon with "DOCX" text, and the filename "SSCL-AO Unit Planning Template for 2022-23.docx".

- Contact [Shane Jones](#) with questions about the organization of the Document Repository

Appendix D: Administrative Educational and Student Support Assessment Rubric 2024

Administrative, Educational, and Student Support Assessment Rubric

	1 – Needs Improvement	2 – Making Progress	3 - Target	Notes
Unit Goals	Did not articulate goals, goals are too vague, and/or goals do not link to institutional / divisional goals	Articulated unit goals that should be more measurable, specific, and linked to institutional/divisional goals	Articulated sufficient (e.g., 3-5 goals) unit goals that are measurable, specific, and linked to the institutional/divisional goals	
Measures	Did not identify measures/targets or measures/targets are too vague and/or misaligned	Identified measures but targets should be more specific and/or better aligned with unit goals	Identified the best measures of unit success with specific targets (e.g., X% participated, completed) for each measure that aligns with the stated goals	
Initiatives	Did not articulate initiatives to describe how the unit will accomplish its goals	Articulated initiatives that describe how the unit will accomplish its goals	Articulated detailed initiatives for all goals that clearly link to assessment results/prior year's action plan and describe how the unit will accomplish goals	
Results/outcomes	Did not report results/outcomes or show progress toward achieving targets	Reported results/outcomes for at least half of the goals and measures in the unit plan and showed progress toward achieving targets	Reported results/outcomes for all measures and goals in the unit plan and achieved most/all annual targets	
Action Plan	Did not articulate an action plan	Identified actions for at least half of the goals and those actions are somewhat aligned to the data and/or to the divisional priorities, goals, and outcomes	Identified data-informed actions for next year that align with the institutional and divisional priorities, goals, and outcomes	

Institutional Effectiveness Plan

Part I: Introduction

Purpose

Institutional effectiveness is a systematic, ongoing process used to advance mission and goals and measure institutional performance. An institutional effectiveness plan provides sustainable, systematic practices and processes to integrate planning, assessment, and continuous improvement activities to facilitate data-informed decision making, policy development, budgeting, and institutional improvement and renewal. The institutional effectiveness plan serves as a foundation for determining what to evaluate and against what performance expectations.

Assessment

Assessment includes processes and tools designed to collect data from various sources to compare actual performance with defined expectations. Assessment assists in gauging progress toward stated goals to determine how well the institution meets those expectations. Assessment data can help identify needed change to increase effectiveness.

Accreditation

Institutional and specialized accreditors require that institutions plan, assess, and continuously improve all aspects of institutional operations and student learning. Demonstrating institutional effectiveness is necessary for meeting the accreditation standards and criteria. Commonwealth University's (CU's) institutional accreditor, the Middle States Commission on Higher Education (MSCHE), has seven Standards for Accreditation, each of which embed assessment and data-informed decision making to drive continuous improvement.

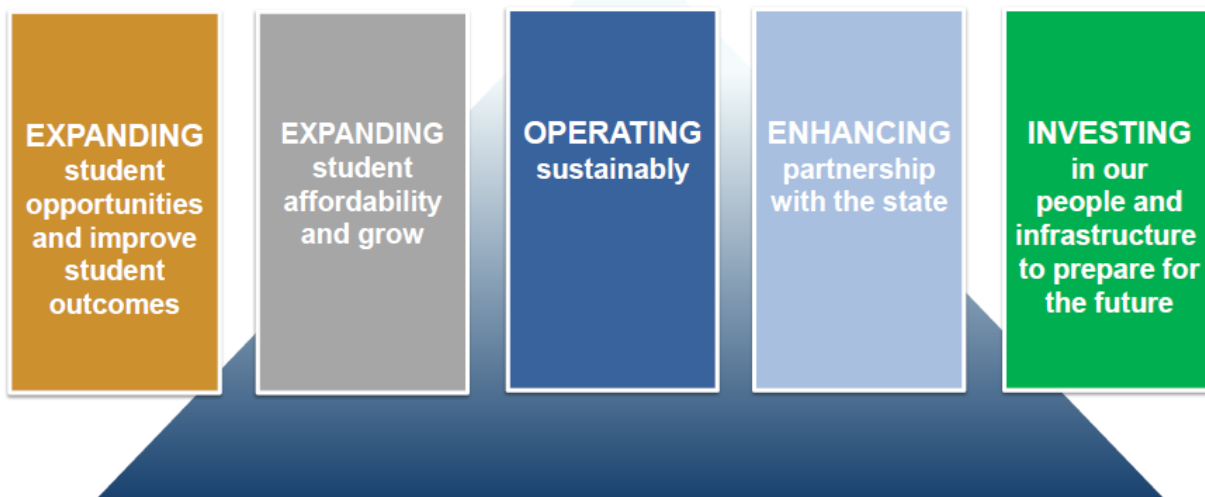
Part II: Strategic Direction and Planning

This section includes information about setting the strategic direction and planning processes which are informed by internal and external sources and at different levels (e.g., State System, institutional, divisional, unit, and program).

A. Act 188, State System's Mission, and 2022-25 Priorities

Act 188 is the enabling legislation for the Pennsylvania State System of Higher Education ("State System"). It states that "the primary mission of the system is the provision of instruction for undergraduate and graduate students to and beyond the master's degree in the liberal arts and sciences and in applied fields, including the teaching profession." The State System's website provides a current, more detailed mission "to provide high-quality education at the lowest possible cost to students; to increase educational attainment in the Commonwealth of Pennsylvania ("the Commonwealth"); to prepare students at the undergraduate and graduate levels for professional and personal success in their lives; and to contribute to the economic, social, and cultural development of Pennsylvania's communities, the commonwealth, and the nation" ([About the State System](#), para 1.). To meet Pennsylvania's educational needs, System-level research asserts that growth will come from (1) improving student outcomes, (2) strengthening traditional pipelines, (3) expanding underserved, adjacent, new markets, (4) investing in high-demand occupations and credentialing pathways, and (5) building new partnerships. From this, the State System has articulated five related priorities as stated in Figure 1.

Figure 1: State System 2022-25 Priorities



As one of the 10 State System institutions, CU aligned its mission and priorities with the State System’s mission and priorities. The CU Strategic Planning process intentionally incorporated the System’s purpose as outlined in Act 188, its strategic statements, and the 2022-25 System priorities shown in Figure 1. Each year, CU conducts a comparative analysis of the System’s priorities and objectives to ensure appropriate alignment.

B. CU Mission, Vision, Values, and Strategic Planning Development Processes

CU’s inaugural strategic statements were developed over a two-year period culminating with the adoption of a unified mission, vision, and values in August 2022 and the final endorsement of the [CU Strategic Plan](#) in October 2023. In 2021-22, CU commissioned Blue Beyond Consulting (BBC) to facilitate a year-long engagement process with key internal and external constituencies to arrive at the strategic statements that were endorsed by the Council of Trustees (COT) on August 9, 2022. The engagement strategies included two Cabinet workshops, 17 one-on-one stakeholder interviews, 23 focus groups, two online surveys, collaboration with a cross-campus steering committee, campus visits, and several COT presentations.

BBC continued their work in the 2022-23 fiscal year, building upon those initial engagement strategies, in consultation with President’s Cabinet, a three-person core team, and the broadly representative Strategic Planning Committee (SPC). During the first three months (July – September 2022), BBC consulted with the core team, President’s Cabinet, and key stakeholder groups to aid in seating the SPC, conducting background research, and interviewing key stakeholder groups. The remainder of the fall included an extensive review of State System and CU planning documents, metrics, research studies, institutional survey results, accrediting standards and reports, data dashboards, and the Strategic Plan survey results collected to inform institutional priorities and goals.

The SPC met, and presentations were provided at university-wide forums to review and refine the strategic plan framework including core commitments, strategic priorities, goals, initiatives, and selected metrics. Following a March 2023 constituent survey to validate the plan draft, the SPC met and refined the plan before presenting it and soliciting final feedback at local assemblies and the May Council of Trustees meeting. The Senate endorsed the five-year strategic plan at its inaugural meeting on September 14, 2023, and the Council of Trustees endorsed it on October 6, 2023. Consistent with the legacy institutions’ approach, a similar, comprehensive process for developing the Strategic Plan occurs, at minimum, once every five years while the SPC annual review, CU

Assessment Council and subcommittee reporting, and President’s Cabinet monitoring of plan progress against metrics lead to potential recommendations for change during the life of the plan. Progress reports are also provided at meetings such as university-wide town halls, senate, local assemblies, and Council of Trustees meetings.

C. CU Strategic Statements and Plan

Below are the elements of the CU Strategic Plan Framework, including the mission, vision, values, core commitments, and priorities. The Strategic Plan posits three core commitments and four priority areas with supporting initiatives and metrics. The Strategic Plan Framework (see Figure 2 followed by the statements in text) serves as the foundation for institutional effectiveness as CU implements the five-year plan, aligns divisional and unit planning, and assesses progress toward realizing its mission and priorities.

Figure 2: CU Strategic Plan Framework (Placement Format)



1. Mission

Our hard-working and determined students are at the heart of everything we do. Commonwealth University leverages the power of Bloomsburg, Lock Haven, and Mansfield to provide affordable, high-quality education emphasizing high-impact practices, personal and career connections, and inclusivity supporting all learners to succeed in our region and beyond.

2. Vision

Commonwealth University will be a premier regional public institution that supports and prepares all students for success in the global workforce by providing an accessible and transformative educational experience.

3. Values

Six values were identified through the extensive engagement strategies facilitated by BBC and include:

- Student-Centered
- Welcoming & Inclusive
- Accessible
- Innovative & Exceptional
- Collaborative
- Resilient

The faculty/staff and student perspectives of these six values are defined in Figure 3.

Figure 3: Values Defined



4. Strategic Priorities, Goals, and Initiatives

Figure 4 provides the visual representation of the four strategic priorities, their supporting goal statements, initiatives, and selected metrics. Ongoing review of the selected metrics has resulted in a modified set of selected metrics, which are documented and tracked in the KPI and selected metrics dashboard and workbook. The actual text of the strategic statements follows Figure 4.

Figure 4: Strategic Priorities, Goals, Initiatives and Selected Metrics



Academic Excellence and Innovation

Provide an innovative and transformative educational experience that prepares graduates and credential earners to succeed in meaningful careers and beyond

Initiatives

- Ensure transformative academic offerings that incorporate high-impact practices, accelerated programs, and innovative credentialing opportunities to attract and retain diverse populations of students at each campus
- Develop and support exemplary pedagogy to ensure effective curricular delivery across multiple locations to meet the needs of diverse learners
- Enhance and support student-faculty engagement through the expansion of scholarly and creative works
- Invest in employee professional development to advance scholarship and creative works, innovation, and effectiveness

Student Success

Provide holistic and inclusive support to meet the needs of all students and prepare them for personal and professional success

Initiatives

- Deliver a high-quality, accessible, and affordable educational experience
- Provide meaningful opportunities for networking, mentoring, and career readiness for all learners
- Create and provide exemplary and holistic student services

- Develop a comprehensive process to create a successful transition from student-to-alumni
- Comprehensively embed financial literacy to enable informed decision-making regarding financial aid packaging, scholarships, and student employment opportunities

University Success

Ensure fiscal sustainability, increase enrollment, and develop cutting-edge systems and processes to attract and retain diverse students, faculty, and staff

Initiatives

- Connect enrollment, retention, and graduation rates to fiscal decision-making and sustainability
- Implement employee recruitment and hiring strategies that attract a broad candidate pool to support a diverse student body
- Develop and implement comprehensive onboarding procedures for all university personnel
- Identify and align efficient and effective processes and workflows to ensure appropriate resource allocation and fiscal sustainability
- Market Commonwealth University effectively to students, alumni, and other key constituents
- Develop and implement a comprehensive campaign to support strategic priorities

Welcoming and Inclusive Community

Create an inclusive and welcoming university culture while developing and strengthening connections among our multiple locations and within our local communities

Initiatives

- Create a Commonwealth University culture that embraces change and supports and values employees
- Improve communication and effectively cascade information to inform, engage, and include appropriate stakeholders
- Support student organizations, athletics, and affinity groups in creating an engaged community and sense of belonging
- Develop and expand mutually beneficial town-gown and strategic relationships

5. Core Commitments

Diversity, Equity, Inclusion, and Belonging (DEIB)

Serve as central guiding principles and efforts that ensure all students and university personnel can feel valued, supported, and empowered.

Strategic Communications

Ensure effective communication across the organization while elevating our reputation externally.

Thriving Students, Faculty, and Staff

Foster a culture that embraces growth and wellbeing so that students and university personnel can thrive.

D. Comprehensive Planning Process (CPP)

The Comprehensive Planning Process emerged from the State System’s Redesign initiative to identify pathways that lead to financial sustainability. A comprehensive planning tool, the CPP was designed as a framework to align System and university goals toward financial sustainability and consolidate sustainability planning, goal setting, budgeting, and institutional assessment. The CPP is a high-level, multi-year planning process that integrates academic program planning, university goals and the strategies to achieve them, and the financial and budget projections to support programs, goals, and sustainability. The university developed the CPP narrative with sustainability goals linked to the

strategic priorities, forming a cohesive foundation to support informed, transparent decision making about key budgetary levers (e.g., pricing and institutional aid). As it relates to goal setting, the 2023-24 CPP described three goals linked to strategic priorities to (1) stabilize and grow enrollment (CPP-1); (2) elevate diversity, equity, and inclusion (CPP-2); and (3) ensure financial sustainability (CPP-3). The CPP workbook includes multi-year financial, enrollment, and workforce data, and expected progress on the 24 performance indicators that comprise the Board-Affirmed Metrics (BAMs).

E. Alignment of Priorities, Goals, and Standards

As stated above, CU’s background research and strategic planning encompassed the State System priorities, CPP goals, and MSCHE Standards, Criteria, and Expectations. Grounding the plan in this research resulted in alignment of the sources to CU’s strategic priorities as shown in Table 1.

Table 1: Mapping of Priorities, Goals, and Standards

Strategic Priority Areas and Core Commitments	Comprehensive Planning Process (CPP) Goals	2022-25 State System Priorities	MSCHE Standards
Priority: Academic Excellence & Innovation	CPP-1: Enrollment CPP-2: DEI CPP-3: Sustainability	Opportunity/Outcomes Affordability/Grow Operate Sustainably Partnership Invest in People/Infrastructure	SI, SII, SIII, SIV, SV, SVI,
Priority: University Success	CPP-1: Enrollment CPP-2: DEI CPP-3: Sustainability	Opportunity/Outcomes Affordability/Grow Operate Sustainably Invest in People/Infrastructure	SI, SII, SIII, SIV, SV, SVI, SVII
Priority: Student Success	CPP-1: Enrollment CPP-2: DEI CPP-3: Sustainability	Opportunity/Outcomes Affordability/Grow Partnership Invest in People/Infrastructure	SI, SII, SIII, SIV, SV, SVII
Priority: Welcoming and Inclusive	CPP-1: Enrollment CPP-2: DEI CPP-3: Sustainability	Opportunity/Outcomes Affordability/Grow Partnership Invest in People/Infrastructure	SI, SII, SIII, SIV, SV, SVI, SVII
Commitment: Diversity, Equity, Inclusion, and Belonging (DEIB)	CPP-1: Enrollment CPP-2: DEI CPP-3: Sustainability	Opportunity/Outcomes Affordability/Grow Partnership Invest in People/Infrastructure	SI, SII, SIII, SIV, SV, SVI, SVII
Commitment: Strategic Communication	CPP-1: Enrollment CPP-2: DEI CPP-3: Sustainability	Opportunity/Outcomes Affordability/Grow Partnership Invest in People/Infrastructure	SI, SII, SIII, SIV, SV, SVII
Commitment: Thriving Students, Faculty, and Staff	CPP-1: Enrollment CPP-2: DEI CPP-3: Sustainability	Opportunity/Outcomes Affordability/Grow Operate Sustainably Partnership Invest in People/Infrastructure	SI, SII, SIII, SIV, SV, SVI, SVII

F. Operationalizing the Strategic Plan in Divisional/Unit Plans

The aforementioned strategic statements and plan inform the divisional and unit plans that are developed/refined each year through deliberative and consultative processes that undergo systematic and periodic review and revision. Each summer, CU’s six divisions and more than 60 units conduct operational planning, aligning their goals, initiatives, and measures to the Strategic Plan. Plans are to be submitted in Nuventive by September 15 (or the next closest working day) and mapped to the Strategic Plan core commitments and priorities/initiatives to provide evidence of how functional areas and operations support the mission and priorities. Divisional and unit annual reports (described in Part IV) provide outcomes and action plans.

G. Diversity, Equity, and Inclusion (DEI) Strategic Plan

The DEI Strategic Plan specifies four priorities around diversifying the student body and employee complement, improving URM retention and graduation rates, enhancing the campus climate, and ensuring DEI perspectives are emphasized. The more recent climate and NSSE survey results and participation in AASCU's Transformation Accelerator Cohort (TAC) provided data and information to inform CU's Strategic Plan and refresh DEI strategies.

H. Key Resource Plans

1. Facilities Master Plans

Each campus conducted facilities master planning and maintained a long-term facilities master plan. Those facilities master plans and several other facilities planning tools and analyses have been used to develop a draft integrated facilities master plan with goals to reduce square footage to align with PASSHE space guidelines, consolidate space, and provide adequate housing without logging a surplus. The plan will be finalized in Spring 2025 following vetting through the Senate shared governance structure (including the space and facilities subcommittee), president's cabinet, and Council of Trustees.

2. State System Capital Spending Plan

The five-year schedule of capital construction lists major, high-dollar value construction renovation projects throughout the State System campuses, funded by the Commonwealth. The plan is reviewed annually for potential changes by each university having projects within the upcoming five-year period and approved by the State System Board of Governors (BOG) annually. The capital projects plan includes the space reduction, right-sizing actions for each campus when developing the final needs list.

3. Facilities Projects Plan

This annual plan lists maintenance, repair, and renewal projects for the upcoming fiscal year, including project designs and studies. The Facilities Projects Plan is based on the four-year facilities needs list and is adjusted each year to reflect any changes to campus needs or equipment failures. The plan is completed and submitted to the State System each October for construction contract oversight authority for the following fiscal year. Funding is provided through institutional plant funds, state-provided "Key'93" deferred maintenance funds, auxiliary operations plant funds, grants, and donor funds. The projects plan includes the space reduction, right-sizing actions for each campus when developing the final needs list.

4. Information Technology Strategic Plan

The IT strategic plan prioritizes projects and investments based on their alignment with CU's strategic priorities, current needs, and potential impact, ensuring that critical initiatives are addressed first. The plan outlines a clear roadmap for initiative sequencing and timing and, importantly, is aligned with annual and longer-range budget and IT resource capacity. The draft information technology strategic plan 2024-2027, required by PASSHE, will be finalized in Spring 2025 following vetting through the Senate shared governance structure (including the IT committee) and president's cabinet. It will supersede the current IT strategic plan when finalized.

5. Information Technology Replacement Plan

The information technology replacement plan is an equipment and software life-cycle replacement plan, which is reviewed and executed annually based on a five-year replacement cycle for general use equipment (classrooms and offices) and a ten-year cycle for large equipment like multi-plex printers and wide paper plotters. Software replacement/upgrades are based on effective application and user need evaluation. The plan is based on an established life schedule but reviewed and adjusted each year to reflect any changes to campus needs or equipment failures.

6. Institutional Aid Plan

CU establishes an institutional financial aid strategy supplemental to approved government aid. The aid strategy falls essentially into two categories, merit and need. Based on an established

annual institutional aid budget, the Enrollment Management and Student Affairs Division awards institutional aid in the form of scholarships for students with academic achievement in high school or college for transfer students. Merit-based aid is complemented by need-based aid for students meeting specific financial thresholds.

7. Staffing Complement Plan

The complement plan is a listing of all university faculty and staff positions approved under the current budget. A vacancy report is also distributed weekly to executive staff to show the status of vacant positions. The plans list all labor costs (e.g., salary and benefits), permanency of position (e.g., temporary or permanent), position classification level, union affiliation, and assigned full-time equivalency (FTE). The plans are the basis for calculating the student/faculty and student/staff ratio performance indicators. When a need to hire is identified by the divisional vice president, each vacancy is evaluated by the President and associated divisional vice president for need and/or re-purposing to meet critical staffing needs on campuses.

I. Performance Indicators of Institutional Effectiveness

The various planning processes have yielded metrics for which CU monitors and gauges periodic progress. Those performance measures include:

- 24 [BAMs](#) for Student Success (i.e., enrollment and student outcomes) and University Success (student support ratios, university financial strength, student affordability, private giving)
- 35 Strategic Plan Metrics for Academic Excellence & Innovation, Student Success, University Success, and DEIB of which 22 are KPIs
- 3-4 CPP Goals/Targets; in addition, goals/targets/projections are reviewed and refined during the bi-annual CPP updates, and the CPP workbook provides projections for the BAMs
- Divisional and unit goals, measures, and targets aligned to the strategic documents

While CU tracks all the strategic plan metrics, BAMs, and CPP measures, a cross section of high-level success measures represent CU’s key performance indicators across the four strategic priority areas (see Table 2 and the [KPI and selected metrics dashboard](#)).

Table 2: Key Performance Indicators

Strategic Priorities and Key Performance Indicators	
Academic Excellence and Innovation <ul style="list-style-type: none"> - HC Enrollment - Retention to Second Year - 4-/6-Year Graduation Rates - Faculty/Student Ratio 	Student Success <ul style="list-style-type: none"> - Average Unmet Need - Placement Rates - Student Success metric
University Success <ul style="list-style-type: none"> - Retention to Second Year – URM, Pell - 4-/ 6-Year Graduation Rates – URM, Pell - Net Operating Margin - New Gifts and Pledges - Student Diversity – URM, Pell - Employee Diversity 	Welcome and Inclusive Community <ul style="list-style-type: none"> - Climate Survey - Engagement with Local Communities - Strategic Communication

Note: This section documents several key planning documents; however, other periodic and episodic planning may occur at various levels across CU.

Part III: Planning and Budgeting

The CU budgeting process occurs within the context of the State System’s planning and budgeting guidelines and directives, comprising the CPP. The CPP contains detailed revenue and expense projections for E&G, auxiliary, and restricted funds, along with supporting enrollment and workforce projections, key assumptions, and projections of student success and university success BAMs, which are

critical performance measures. Both the University COT and State System BOG approve the university's budget, as reflected in the CPP. The CPP incorporates results of university-wide planning processes for the current and three future fiscal years.

The main revenue sources are tuition and fee revenue and annual state appropriations from the Commonwealth and allocated by the State System. Revenue projections included in the CPP are determined in the spring as the enrollment outlook for the following year becomes clearer. A well-established and regularly evaluated model is used to forecast future enrollment levels using historical retention rates, projected graduating students, and targeted first-time and transfer students, with appropriate adjustments made as fall registration data becomes available. The System's Budget Office provides multi-year estimates of appropriation levels and tuition rates, as they are set by the BOG. Projections of other student fee rates are provided in accordance with COT decisions. Thus, reliable revenue projections flow from combining the enrollment projections with established tuition and fee rates and estimated state appropriations.

Well-established processes exist to develop the expense side of the budget. It includes projected personnel costs using the Personnel Budgeting Module (PBM) of the SAP system which contains salary and benefit detail information for all existing personnel; current and future compensation provisions of CBAs, and current and projected costs of fringe benefits and payroll taxes. PBM also projects the cost of vacant positions and pool lines for seasonal hires, temporary faculty lines, summer session contracts, and overload/overtime. Other expense categories include (1) institutional student aid based on projected yield of scholarship and grant offers and retention rates for those receiving aid, (2) facilities and technology expenditures, (3) utility costs from historical consumption levels and rates in multi-year utility contracts, changes in space utilization, and implementation of conservation strategies, (4) known charges for services centrally provided by the State System, and (5) encumbrances required for legal and other settlements, facilities projects, technology, marketing, and other purchases.

The operating projections included in the CPP are based on the University's annual budgeting process which begins in January. The President announces the total discretionary operating budget to be allocated to the University's divisions. Budget templates are distributed to divisional vice presidents and their fiscal points of contact (PoCs) for completion. The budget office meets with PoCs throughout the budget process as they develop budgets based on the University's strategic plan and priorities. The budget templates are submitted to the budget office by April 1 followed by budget meetings with the University President, divisional PoCs, and the budget office through mid-April to determine what operational funding is needed to align with operational needs and strategic plan initiatives before finalizing the budget. Divisions must link the funding requests to the University's strategic initiatives on the budget template. These budget allocations will roll up into the University's CPP that is due mid-May. Budgets are loaded in SAP by June 30 and available for personnel and operational spending on July 1.

Part IV: Assessment

Systematic assessment

The CU Assessment Council (CUAC) oversees the development, integration, implementation, and continuous improvement of institutional assessments; academic program assessments; and administrative, educational support, and student support unit assessments to increase institutional effectiveness and student achievement. CUAC and its subcommittees work in collaboration with the Faculty Assessment Liaison, General Education Council (GEC), and Office of Institutional Effectiveness (OIE) to coordinate and make recommendations regarding assessment across the institution. CUAC responsibilities are outlined fully on the [Assessment Website](#). Through an annual academic and administrative reporting process, the CUAC reviews assessment reports and provides recommendations through the SPC to Cabinet. In addition to the CUAC and its committee assessment summaries and year-end reports, other key assessments at various levels are included below.

A. State System Assessments

1. Board-Affirmed Metrics

The State System reports progress on strategic priorities and BAM results to the BOG at least bi-annually (e.g., February and October BOG meetings). BAM results also are posted annually for all State System universities. The [public BAM dashboard](#) includes longitudinal trend data, which was used to inform the CU Strategic Plan and gauges year-over-year progress to benchmark outcomes against all State System universities.

2. Financial Risk Assessment

This assessment identifies the level of each university's operational risk based on the measurement of the past three years of change associated with the annualized student FTE enrollment, adjusted annual operating margin, adjusted primary reserve ratio, and minimum reserves balance. Financial performance expectations are based on NACUBO standards (as specified in BOG policy) by which to address deficient performance.

3. Comprehensive Planning Process (CPP) Targets

As part of the State System's CPP process, targets are set for the CPP goals (in the narrative) and for BAMs for which progress is recorded in the CPP workbook, which documents interim and annual results on the CPP goals for all universities. The CPP also serves as an academic planning and cost analysis tool. The process includes a peer review from representatives of other State System universities.

B. Institutional Assessments

1. Key Performance Indicators

The key performance indicators focus on those most important measures of institutional success. The KPI and selected metrics dashboard documents CU's results for the KPIs, strategic plan selected metrics, and any additional measures used to determine the allocation formula.

2. Strategic Plan Audit and Metrics

Strategic Plan core commitments and priorities are mapped to divisional and unit goals in Nuventive Solutions Premier which generates an audit report that shows how the strategic plan is operationalized in terms of divisional and unit goals, initiatives, measures, and results. The strategic plan includes 35 selected metrics that span all divisions with both institutional and area-specific measures. A cross section of those measures constitute the 22 key performance indicators, but CU tracks progress on the more granular metrics in division or unit reports to holistically determine the degree to which we are accomplishing the Strategic Plan.

3. Institutional Research Dashboards

Institutional data (i.e., official reporting data) are available on the web through more than 30 dashboards on enrollment, retention, completions, graduation rates, etc. Institutional Research follows IPEDS data definitions and standards for data collection and reporting; however, the State System's calculation of some measures, e.g., student-faculty ratios, differs from IPEDS. IR data and State System measures are used throughout the year in campus planning and updates.

4. Program Review Dashboards

Academic program trend data by college, department, and program are provided in dashboards for student enrollment, retention, completions, courses, and faculty. These data are analyzed each year as part of the annual report program assessment review (PAR) for each academic program.

5. IPEDS

CU uses IPEDS as a data source for peer comparisons of colleges and universities within and outside of the State System. Peer comparisons are also conducted among State System universities where information is available on State System dashboards and data sources.

6. Institution-wide Surveys

OIE's survey web page posts university-wide survey results for the following surveys, providing easy access to data for use in institutional, unit, and program planning that occurs with periodic (e.g., divisional and unit planning) and ad-hoc planning initiatives. Presentations of summary results and analyses are also shared at university forums (e.g., town halls, senate, local assemblies, leadership meetings, divisional/unit meetings).

a. National Survey of Student Engagement (NSSE)

All State System universities administer the NSSE Survey once every three years to collect information from first-year and senior students about educational quality and how they spend their time.

b. First Destination

CU uses the National Association of Colleges and Employers (NACE) framework for its post-graduation core survey questions to collect initial data on respondents' career placement and graduate/professional school enrollment. Program-specific questions provide academic programs with data that informs program planning. The survey is administered twice a year, in the spring and fall, six months after graduation.

c. Climate Survey

A system-administered climate survey was conducted in 2022 with the intent of surveying once every three years. The survey collected perceptions of faculty, staff, students, and non-represented employees about safety; discrimination, bias, and harassment; diversity and inclusion; engagement; political and religious views; and overall climate.

Note: Other surveys used for strategic planning or divisional/unit planning may be administered across CU (e.g., LibQual, Optimal Town College Assessment, Market Research, Athletics Interest and Abilities Survey)

7. CU Forums

Forums such as town halls, senate, local assemblies, meet and discuss, student government meetings, and COT meetings, etc., offer opportunities to provide updates on outcomes and results to the University community and key constituencies but also to receive questions and comments that can inform change.

8. President's, Management, Faculty, and Staff Performance Evaluations

BOG Policy 2002-03-A: Evaluating Presidents allows for regular review of the President, and the Non-represented Employee Performance and Reward Manual outlines performance evaluation processes for managers. The evaluation template requires that goals and expected results are established at the beginning of the evaluation cycle and linked to the core commitments and strategic plan/System priorities. Performance is evaluated at the end of the cycle against those goals and six standard proficiency factors (e.g., commitment to university/System mission, leadership, initiative and commitment, management practices, communication skills, job knowledge, and relational skills). In addition, all represented employees are evaluated according to the provisions outlined in the respective collective bargaining agreement.

9. Leadership Development

CU established leadership development initiatives that include leadership assessments, mentoring, and development sessions. From the pulse survey results, President's Cabinet members created leadership development plans for which progress is reported to the President in one-on-one meetings.

C. Divisional, Administrative, Educational Support, and Student Support Assessment

1. Divisional Scorecards

The President reviews quarterly progress on a subset of divisional measures, most of which are performance indicators or divisional plan metrics.

2. Divisional / Unit Administrative, Educational Support, and Student Support Annual Reports

Every division and unit submits its plans, initiatives, measures, and targets in Nuventive by September 15. Those measures and targets may include key performance indicators, selected strategic plan metrics, and other more granular measures of unit success. Results can be entered into Nuventive as soon as available but no later than July 15 (*per the Fall 2024 committee decision to move the due dates for all units which were earlier in the year*). Following these submissions, the Administrative, Educational, and Student Support Assessment Committee develops a summary report of the submissions that provides feedback on the quality of planning and assessment and shows the degree to which divisions/units are meeting targets based on the criteria specified in the assessment plans. These reports are shared with the committee, administration, unit points of contact in assessment sessions, and the CUAC.

3. Other Major Assessments

a. Financial Audit

Each year, the University commissions an independent financial statement audit of finances

b. Enrollment Studies

The State System and CU has partnered with Ruffalo Noel Levitz to conduct recruitment, financial aid optimization, and price sensitivity studies. In addition, CU has consulted with RNL on the development of enrollment management strategies.

c. Facilities Annual Evaluation Report

A facilities operational evaluation/assessment is conducted by a third-party vendor, currently Gordian. The vendor develops performance measures for work order processing, preventive maintenance work, general maintenance expenditures, capital renewal reinvestment rates, energy consumption/costs, staffing workload and supervisor ratios, and campus service satisfaction survey feedback. The report is typically available in March/April of each year for the previous fiscal year

d. Projects Design and Construction Operations (Peer Review)

This is an internal operational review by a similarly sized State System campus conducted every five years by peer project and construction staff reviewing and assessing the planning and construction processes, forms, policies, methodologies, techniques used at each institution for effectiveness and use of best practices. It serves as a shared practice and cross-campus information exchange program specifically for project work.

e. Information Technology Audit

The State System annually contracts with the accounting firm, Clifton Larson Allen LLP, for a comprehensive Information Technology Audit. The audit covers IT organization and security, access controls, change management controls, and backup and recovery. CU completes multiple questionnaires and uploads files validating compliance with IT Audit standards. Any exceptions discovered are reported to the Chief Information Officer (CIO) for further explanation and/or remediation. After the four-month process is completed, which includes university feedback, a final list of recommendations is made to the CIO and reported to State System's Office of the CIO.

D. General Education Assessment

Semester Data Collection and Reporting

The GEC serves as the body responsible for assessing CU's institutional learning goals, as articulated in the General Education Program. The GEC Chair leads General Education Program Assessment. The [GE website](#) provides information about the GE Program themes, goals, and

learning objectives. Under introduction and resources, the site also links to the [GE Advisor and Student Handbook](#), curriculum rubrics, GE worksheets (for organizing assessment data), the GE data submission forms (Qualtrics-based forms), and the [GE dashboard](#), which shares summary student learning outcomes data. GE data collection and summary reporting occurs every semester for all learning goals and objectives. Assessment reviews with a deeper analysis occur on a five-year rotation as shown in Table 3 below.

Table 3: General Education Assessment Review Cycle

Year	Semesters of Data Collection	Program Learning Goal	Academic Year Review
Year 1	Fall 2023 – Spring 2024	First-year Seminar	2024-25
		Written Communication	
		Oral Communication	
		Quantitative Reasoning	
Year 2	Fall 2023 – Spring 2025	Historical Themes	2025-26
		Diversity	
		Global Perspectives	
		Foreign Language	
Year 3	Fall 2023 – Spring 2026	Citizenship and Society	2026-27
		Ethical Reasoning	
		Critical Analysis and Reasoning	
		Natural World	
Year 4	Fall 2023 – Spring 2027	Literature	2027-28
		Arts	
		Creative	
Year 5	Fall 2023 – Spring 2027	Five-year program review	2028-29

E. Academic Program Assessment

The Academic Program Assessment Committee oversees academic assessment processes to ensure disciplined self-assessment of institutional effectiveness in academic departments/programs and help the University share and utilize assessment data for decision making, resource allocation, and improvement. The Annual Report PAR User Guide provides information about the academic program annual report PAR now due in Nuventive by September 15 (*per the Fall 2024 committee decision to move the date which was May 15*). The report includes a program description, curriculum map, student learning outcomes, analysis of program data, and action plan based on program and student learning outcomes. Following these submissions, the Academic Program Assessment Committee develops a summary report of the submissions that provides feedback on the quality of academic program planning and assessment and shows the degree to which students are meeting program learning goals/objectives based on the criteria specified in the assessment plans. These reports are shared with the committee, academic administration, college/program assessment coordinators through assessment sessions, and the CUAC.

F. Program Review

The BOG Policy 1986-04-A: Program Review and associated procedures were suspended in 2019 but underwent State System review, revision, and approval in 2024. In accordance with the revised policy and procedures, CU developed five-year rotation schedules, program review templates, and a process/timeline for all academic programs and administrative, educational support, and student support units. However, all CU programs, both administrative and academic, underwent a comprehensive review prior to and during the integration. The program review schedule accounts for those reviews for integration as well as scheduled external reviews (e.g., accreditation self-studies and reporting). All programs and units that have external reviews and reporting requirements will complete their program review in accordance with that schedule (e.g., accredited programs undergoing self-study in 2024-25 are scheduled for the program review, and the self-study is largely

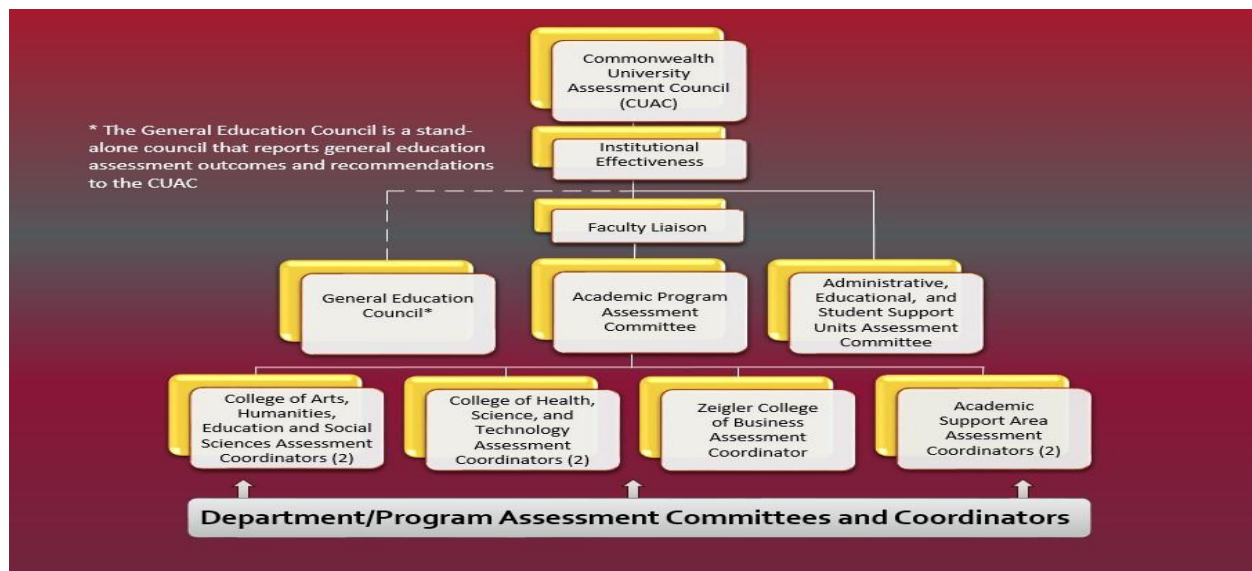
used in lieu of the review. A program summary of strengths, opportunities for improvement, and planned actions is submitted to the State System). All unaccredited programs and units without external reporting requirements will conduct program reviews according to the schedule, beginning in 2026-27.

Note: This section documents several key assessments; however, other periodic and episodic assessments may occur at various levels across CU.

PART V: Continuous Improvement

The CUAC and its subcommittees and the SPC are structures established to develop data-informed recommendations for President’s Cabinet. Figure 5 shows the CUAC reporting structure. On the academic side, the program and college assessment coordinators are conduits of information to the Academic Program Assessment Committee. Feedback from the assessment coordinators and the annual report summaries serve as inputs for assessment program and process improvements. Similarly, the Administrative, Educational, and Student Support Assessment Committee includes representatives from the divisions who can share feedback from their units as well as review annual report summaries to identify potential changes. Both academic and administrative, educational, and student support annual reports include results summaries and action plans, which articulate divisional, unit, or program-level outcomes and efforts toward continuous improvement. Annual reports are evaluated with a rubric, and the results are aggregated into assessment summaries that are forwarded to the committees for review and potential action. All annual report assessment summaries (including those from the GEC) are shared with the administration, assessment coordinators and points of contact, and the CUAC through the year-end committee reports. Minor committee suggestions are addressed by the Office of Institutional Effectiveness and implemented immediately (e.g., changes to the data dashboards, user guide, rubrics). Other changes that require resources or collaboration across divisions are provided to the CUAC in the year-end committee reports. The CUAC will review and forward major recommendations through the SPC to the President’s Cabinet to determine any impact on strategic priorities/goals.

Figure 5: CUAC Assessment Reporting Structure



According to its charge and responsibilities, the SPC will also review the institution’s progress on strategic plan implementation, including annual reports and dashboards for key performance indicators and strategic plan selected metrics. Recommendations resulting from those reviews are forwarded to President’s Cabinet for consideration.

Administrative Unit – Nuventive Assessment Session

May 8, 2025



Agenda

- A. Welcome
- B. Review the 2023-24 annual report assessment review rubric results and opportunities for improvement
- C. Discuss MSCHE team findings about administrative, educational and, student support (AES) assessment
- D. Set expectations for assessment reporting by July 15
- E. Review reporting in Nuventive
- F. Consider OIE resources (e.g., web pages and dashboards)
- G. Ask questions and give answers (throughout the entire session)
- H. Complete [session evaluation](#)



Assessment Review Rubric in Nuventive

Admin (Enrollment Management and Student Affairs) - Health Centers/Clinics

ASSESSMENT REVIEW RUBRIC

Report last run 4/23/2025 7:54 PM

Review Year

Showing 1 of 1

2023 - 2024 Complete 100% C. Myers 6/24/2024

Unit Goals Score
3 - TARGET - Articulated sufficient (e.g., 3-5 goals) unit goals that are measurable, specific, and linked to the institutional/divisional goals

Measure Score
3 - TARGET - Identified the best measures of unit success with specific targets (e.g., X% participated, completed) for each measure that aligns with the stated goals

Initiative Score
3 - TARGET - Articulated detailed initiatives for all goals that clearly link to assessment results/prior year's action plan and describe how the unit will accomplish goals

Result / Outcome Score
3 - TARGET - Reported results/outcomes for all measures and goals in the unit plan and achieved most/all annual targets

Action Plan Score
3 - TARGET - Identified data-informed actions for next year that align with the institutional and divisional priorities, goals, and outcomes

ONLYOF

Assessment Feedback

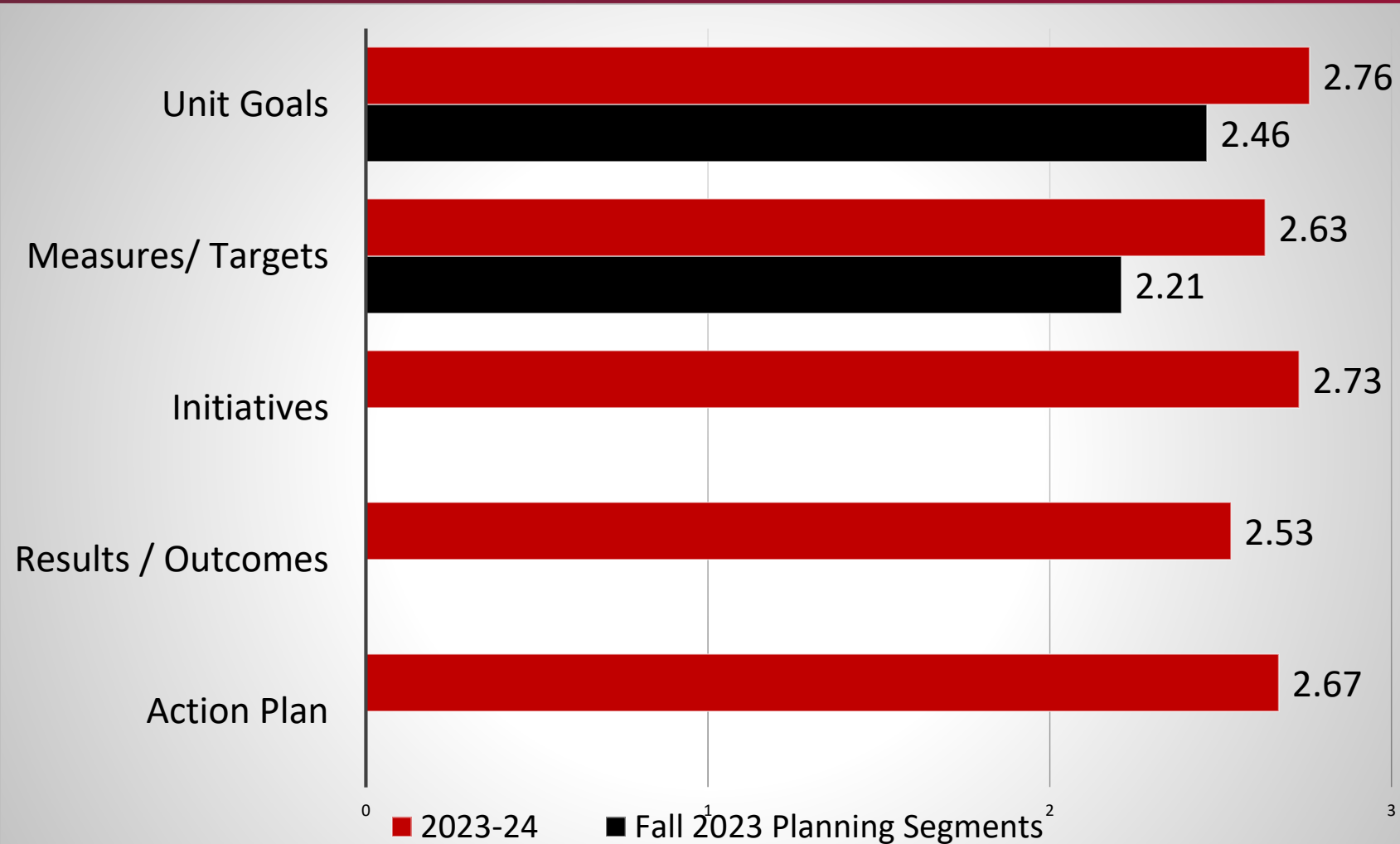
COMMONWEALTH UNIVERSITY OF PENNSYLVANIA

Assessment Feedback

Admin (Enrollment Management and Student Affairs) - Health Centers/Clinics

Click the three dots to see all notes or click icon to run report

Annual Report 2023-24 Rubric Scores



Documented in the [AES Assessment Summary 2023-24](#) which:

- Describes the process
- Shows unit mapping to the strategic priorities
- Includes average rubric scores and percent of unit reports meeting expectations
- Offers opportunities for improvement

Unit Goals

Opportunities for Improvement

- Unit goals (78%; n=51/65 met expectations)
 - Focus more on outcomes – what are your most important outcomes?
 - Increase enrollment
 - Increase satisfaction
 - Decrease wait times
 - Increase utilization
- ...and less on initiatives as a goal statement which is the HOW
 - Develop a program
 - Implement a process or policy
 - Develop a plan
- State 3-5 enduring goals

The screenshot shows a web-based goal management interface. At the top, there is a search bar with the text 'Increase Customer Satisfaction' and a dropdown arrow. Below this is a navigation bar with three tabs: 'UNIT GOAL' (selected), 'MEASURES', and 'RESULTS / OUTCOMES'. A note below the tabs states '* denotes a required field.' The main form contains the following fields:

- Goal Name ***: 'Increase Customer Satisfaction' (highlighted in yellow)
- Unit Goal ***: 'Improve year-over-year survey scores for Open House events and Daily Visits' (highlighted in yellow)
- Goal Status**: A dropdown menu currently set to 'Active'.
- Goal Year(s)**: A list of year ranges with a dropdown arrow: '2022 - 2023 x', '2023 - 2024 x', and '2024 - 2025 x'.
- Initiatives ⓘ**: A list of initiatives for each year:
 - 2022-2023: 1. connect faculty to campus partners whenever possible. Provide lunch for all visitors
 - 2023-2024: 1. Connect individual tour guides to survey data - improve performance -
 - 2024-2025: 1. Connect individual tour guides to survey data - improve performance, 2. Use of tour guide specific surveys to guide training and make continual improvements to tours, 3. Survey withdraw admits to understand consumer behavior of this segment

Measures/Targets Opportunities for Improvement

- Measures/targets (65%; n=42/65 met expectations)
 - Articulate a specific target (e.g., a number or percent increase) and not initiatives
 - Ensure measures and targets align with the goals and are consistent with each other (e.g., if the measure calls for a number, then the target should be expressed as a number not percent)

Click the three dots to see all information on measures

Search: Increase Customer Satisfaction

Measure Status: View All

UNIT GOAL MEASURES

Survey Results from Open House Survey Results from Daily Visit C. Lapos 10/10/24

Measure: Survey Results from Open House, Survey Results from Daily Visit

Establish baseline year for tour guide performance based on surveys C. Lapos 9/14/23

Measure: Establish baseline year for tour guide performance based on surveys

* denotes a required field.

Measure Status *
Active

Measure *
Survey Results from Open House
Survey Results from Daily Visit

Target(s)
Open House Score: 3.58/4.0
Daily Tour Score: 3.74/4.0

Initiatives Opportunities for Improvement

- Initiatives (75%; n=49/65 met expectations)
 - State and label initiatives for each year (e.g., 2024-25)
 - Provide more details
 - Link to previous year's assessment results/action plan in the future

Q Increase Jones Honors College enrollment (CU-university-wide) to 8-10% of total undergrad... | v

■ UNIT GOAL ● MEASURES ● RESULTS / OUTCOMES

Initiatives ⓘ

2023-24
Recruitment of high performing regional area high school students, transfer students, early college students, and high performing 2nd year CU students

2024-25

Continue recruitment of high performing regional area high school students, transfer students, early college students, and high performing 2nd year CU students. Specifically, we are:

1. (For prospective high school students) Sending HC personnel to large area high schools with underrepresented CU populations for HC recruiting events. We held two all-day events, one each at Williamsport and Hazleton Area High Schools.
2. (For prospective high school students) Post-card initiative. Honors College students get volunteer service hours (which are one of our required HC program requirements) for hand-writing post cards to Honors-qualifying high school students who have applied to CU but not yet deposited and/or committed to join the Honors College.
3. (For prospective high school students) We have Honors College staff and/or students tabling at all on-campus recruitment events (e.g., accepted students days, high school juniors days).
4. (For prospective high school students) We are working with admissions to include Honors College slides into all of their "boilerplate" recruitment presentations that are shown to prospective new students visiting campus. We have built campus-specific content that highlights the unique features of the Honors College on each campus, as well as slides that outline HC material in general (e.g., benefits of joining the HC, HC program requirements).
5. (For prospective high school students) On days when large groups of high school students are visiting campus, we have had HC staff attend the introductory presentations and pitch the Honors College in person.
6. (For Early College students) We are building a positive working relationship with the Early College staff (Jerome Manley and Kendra Rockwell) to recruit current CU EC students who we hope will apply to and attend CU. Where possible (i.e., in Honors classes where seats are available and the EC students have the requisite high school GPA), we have scheduled EC students into 200-level Honors seminars. We heavily recruit this (small) latter group of students into the Honors College, with the pitch that – unlike any other first-year CU students – they have already completed part of their Honors College program requirements.
7. (For transfer students) We are working with admissions to target select transfer students into the Honors College, which would fall into two pools: (i) High-achieving/high-potential transfers who enter CU with 30 or few credits; and (ii) transfer students who were enrolled (and in good standing) in honors programs at their previous institution.

Results Opportunities for Improvement

- Results – outcomes (57%; n=37/65 met expectations)
 - Do not let results blank
 - Enter unreported results for placeholders or for measures for which no outcomes were reported
 - Separate in Nuventive multiple measures/targets to more accurately report results and targets met
 - Provide discussion and analysis

Bloomsburg | Lock Haven | Mansfield

DIVISION / UNIT PLANS AND RESULTS

Alumni Volunteer and Employer Engagement

Measure Status: View All | Reporting Period: View All

UNIT GOAL | MEASURES | RESULTS / OUTCOMES

Unique Alumni Volunteers

- 2023 - 2024: Target Met (N. Lefelhoc 6/28/24)
 - Result / Outcome: Engaged 175 unique alumni volunteers.
 - We achieved our goal due to the new alumni volunteer roles aligned with student engagement.
 - Implemented comprehensive volunteer management process.
 - Created Lock Haven branded marketing materials to promote alumni volunteerism.
 - Launched alumni surveys to collect feedback on alumni events and alumni volunteer experiences to improve and adapt strategies.
 - Adopted board management software to facilitate board engagement and support records of board activities.
 - Action Plan For Next Year (Initiatives): Focus on building volunteer opportunities and collaborating with academic and Student Success and Campus Life departments to increase volunteers.
- 2023 - 2024: Target Met (N. Lefelhoc 7/10/24)
 - Result / Outcome: Achieved an 85.19% alumni volunteer Net Promoter Score (NPS).
 - Adopted NPS survey and follow-up question to gain a better understanding of reason for score.
 - Volunteer and event surveys are new to Lock Haven. Having these in place will help us receive feedback from our volunteers and alumni.
 - Action Plan For Next Year (Initiatives):
- 2023 - 2024: Target Met (N. Lefelhoc 7/10/24)
 - Result / Outcome: Achieved a 92.45% alumni event Net Promoter Score (NPS).
 - Adopted NPS survey and follow-up question to gain a better understanding of reason for score.
 - Volunteer and event surveys are new to Lock Haven. Having these in place will help us receive feedback from our volunteers and alumni.
 - Action Plan For Next Year (Initiatives):

8

Actions

Opportunities for Improvement

- Actions (75%; n=49/65 met expectations)
 - Provide actions that were omitted in part or altogether
 - Share more detail
 - Connect result - actions
 - Complete actions for areas in which placeholders were entered
 - Consider actions even when target is met

The screenshot shows a dashboard for 'Student-Patient Satisfaction'. At the top, there are filters for 'Measure Status', 'Reporting Period', and 'Conclusion', each with a 'View All' button. Below the filters is a navigation bar with three tabs: 'UNIT GOAL', 'MEASURES', and 'RESULTS / OUTCOMES', with the latter being the active tab. The main content area displays a report titled 'Student survey, created through survey Monkey, and distributed to students seen at the ...'. The report is for the period '2023 - 2024: Target Met' and was created by 'S. Brunozi' on '6/11/24'. The report is divided into two sections: 'Result / Outcome' and 'Action Plan For Next Year (Initiatives)'. The 'Result / Outcome' section describes a survey that was shortened from 10 to 8 questions and sent to students at Bloomsburg, Lock Haven, and Mansfield campuses. It reports that over 91% of students were satisfied with the health services provided. The 'Action Plan For Next Year (Initiatives)' section suggests shortening the survey further, re-examining clinic practices, and outreach to increase satisfaction scores to a goal of >91% for the next academic year.

Documentation Opportunities for Improvement

- Upload relevant supporting documents, e.g., survey results, spreadsheets, etc.

Conclusion *




Target Met



Action Plan For Next Year (Initiatives)

Attempt to shorten the survey even further in order to increase participation. Confirm how Mansfield is sending surveys to students to ensure no bias. Satisfaction %s are good (91%) but it would be great to get them closer to 95%. Re-examine clinic practices, outreach, education regarding health services in order to continue to increase overall satisfaction scores. Share the survey results with the clinic staff in order to reexamine practices and customer service practices to increase the overall satisfaction to a goal of >91% for next academic year. In the survey, stress was reported to impact academic success in a significant number of students, which could be a bias due to the likelihood of illness causing the stress, however future survey questions could focus on identifying other factors that impact academic success and potentially retention.

Related Documents

Document Name	Document Description	
Survey Results Bloomsburg Survey Spring 2024 No Comments.pdf		
Survey Results Lock Haven Spring 2024 No Comments.pdf		
Survey Results Mansfield Survey Spring 2024 No Comments.pdf		

Acknowledge CU Work in Progress

- Academic Affairs Programs in Review
- Administration Cross-Divisional Work
- Advancement Divisional Scorecard
- Enrollment Management Retreats and Town Halls
- Fiscal Affairs CPP and Budgeting
- Information Technology Strategic Plan
- Facilities Master Planning

MSCHE Team Findings – Recognitions

A few examples:

- Integrating three institutions is not an easy task, the efforts CU has placed on creating their mission, vision, goals, and outcomes in such a short time is admirable. Also, getting these approved and recognized by the community at large is noteworthy. (SI, p. 7)
- The University should be commended for successfully managing the complex and time sensitive integration of three college systems and campuses. Throughout this process, the University maintained each campus's unique identity while continuing to deliver uninterrupted student support services. (SIV, p. 17)
- We are especially impressed by the integrated process for mission development, strategic planning, and the creation of the many budgeting, planning, and financial processes necessary to integrate the three campuses into CU. (SVI, p. 23)

MSCHE Team Findings – Collegial Advice

- Institutionalize formal **ethics and integrity review cycle** for continuous improvement (SII, p. 10)
- ...Developing more comprehensive strategy for **multi-modal course offerings...** (SIII, p. 13)
- ...Address equity gaps in **access to high-impact practices...** (SIII, p. 13)
- Increasing the frequency and variety of **direct evaluations of student support service offices** could provide valuable feedback from students (SIV, p. 16)
- Re-evaluating the **first-year seminar course and its impact on the student experience...** (SIV, p. 16)
- ...Suggest [administrative] reports more directly **connect the data they collect to both resource allocation and improvement – especially at the unit level...** (SVI, p. 22)
- ...Assess [shared governance structures] effectiveness and responsiveness to the institution's needs... (SVII, p. 25)
- Any other insights?

Expectations for 2024-25 Assessment Reporting

Prepare for reporting – review status now

- Review goals, initiatives, measures, and targets
 - What did you say you would do and measure?
 - What did you do and measure?
 - What resources did you allocate?
 - Are there some adjustments that should be made (e.g., do your measures and targets align with each other and your goals)
- Consult your supervisor and make needed adjustments in Nuventive, if warranted
- Collect your results/outcomes

Expectations for 2024-25 Assessment Reporting

- May want to run the **Plan Progress Report** and use it as a basis to collect/organize your data -

The screenshot displays the Nuventive Solutions web application interface. On the left, a navigation menu is open, highlighting the 'DIVISION / UNIT PLANS AND RESULTS' section. The main content area shows a 'RESULTS / OUTCOMES' section with a 'Plan Progress Report' button. A yellow callout box with a pointer indicates: 'Click on the Plan Progress Report Icon and Run Report for 2024-25'. The interface also shows a 'Reporting Period' dropdown set to 'View All' and a 'Conclusion' dropdown set to 'View All'. The bottom right corner features the logos for Bloomsburg, Lock Haven, and Mansfield, along with the text 'COMMONWEALTH UNIVERSITY OF PENNSYLVANIA' and 'Plan Progress Report'.

Plan Progress Report

Professional Testing Services	
<p>Unit Goal: Examine and evaluate testing programs and services that meet key stakeholder needs</p> <p>Goal Status: On Track</p> <p>Goal Year(s): 2023-2027, 2027 - 2028</p> <p>Initiatives:</p> <p>2023-24: Fill vacant positions at the Test Center, replace LH camera system, implement <u>WorkKeys</u> exam program (BL), reach out to Job Corps to explore CED/HISET appointments</p> <p>2024-25: Begin implementation of the Test Center; implement TC Comment Card process at LH Test Center; attend RBCon24 Conference to identify best practices; explore A Test Center location; reduce seats in unpopular programs; do not renew agreements with programs that do not align with promotional activity with <u>StratComm</u> website (Triad); add new testing programs</p> <p>Start Date: 01/01/2023</p>	
Measures	Results / Outcomes
<p>Measure: Overall volume of exams administered</p> <p>Target(s): Year-One through Year-Five SP Target: Increase overall volume by 5% per year Year-Five SP Aggregate Target (2023-28): Increase overall volume by 25% over five-year period</p>	
<p>Measure: # exams administered in signature testing programs</p> <p>Target(s): Year-One through Year-Five SP Target: 15 additional exams administered in the seven signature testing programs each year Year-Five SP Aggregate Target (2023-28): 75 additional exams administered in the seven signature testing programs since baseline (2022-23)</p>	<p>Report on prior year's actions: Resources allocated to implement prior year's actions: Results and analysis: Action Plan for Next Year (based on results): Resources Needed/Expected to Implement Actions (Initiatives):</p>

As an option, use this blank space to organize your actions implemented, resources allocated, results/analysis, actions, and resources needed next for year

Add in the prompts for your use; those in red may be refined later during unit planning

Expectations for 2024-25 Assessment Reporting

Complete these fields in Nuventive on the Results and Analysis Tab:

- **Reporting period** (select 2024-25 from the dropdown)
- **Report on prior year's actions** – What did you actually do to meet your target in 2024-25?
- **Resources allocated to implement prior year's actions** – What resources were needed beyond current staff, technology, and facilities in 2024-25?
- **Results and analysis** – What are the results, what do they mean, what did you learn?
- **Conclusion** (select met/not met from dropdown)
- **Action Plan for Next Year (Initiatives)** – Connect the results data to the actions you will take next year. How does the data inform your actions (at least preliminarily)?
- **Resources Needed/Expected to Implement Actions (Initiatives)** – What resources do you need beyond current staffing, technology, facilities, etc.?
- **Related Documents** – Upload supporting documents and link to results

Nuventive Results and Analysis Screen

Result / Outcome Date *

05/01/2025

Reporting Period *



Report on Prior Year's Actions *

Resources Allocated to Implement Prior Year's Actions *

Result and Analysis *

Conclusion *



Action Plan For Next Year (Initiatives)

Resources Needed/Expected to Implement Actions (Initiatives)

Related Documents

Document Name

Document Description



Complete fields in the white portion of the screen. You may need to refine the Action Plan for Next Year and Resources Needed as your unit conducts 2025-26 planning

Expectations for 2024-25 Assessment Reporting

- Annual Report Due Dates

- May 21, 2025 – faculty-led units submit
- July 15, 2025– administrative units submit or when available (e.g., fiscal affairs year-end audited data)

Note: Use placeholders to denote outcomes data not available at the time of submission. Report data as soon as available (e.g., audited financials, census data enrollment and retention) and state actions

- Submitted in [Nuventive Solutions Premier](#)
- Use OIE resources for assistance (e.g., web pages, dashboards, contacts, etc.)

Reporting in Nuventive Solutions Premier

- Log into [Nuventive](#)
- Review basic screens
- Answer any questions



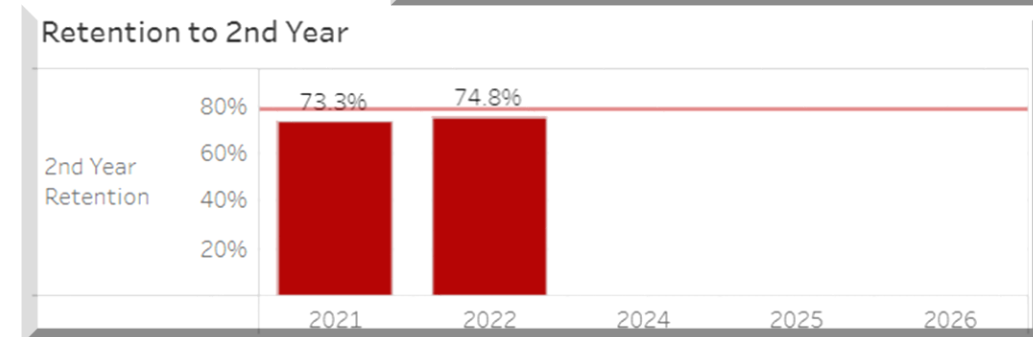
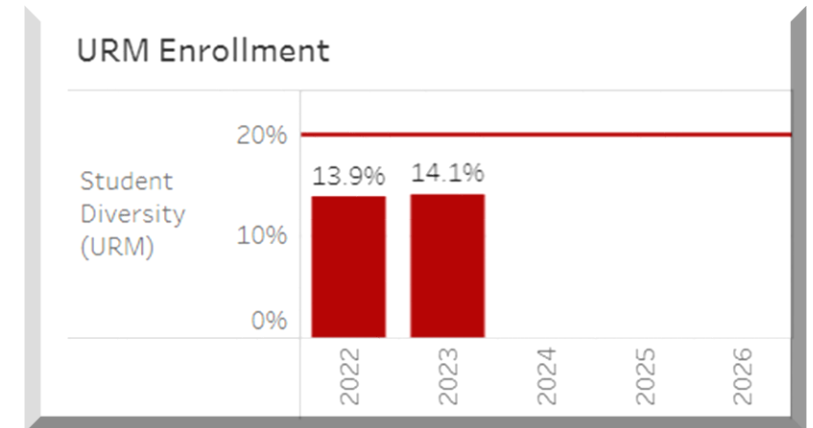
Review OIE Resources – Web Pages

The following web pages provide information on assessment-related topics / resources:

- [Strategic Planning](#) (for the strategic plan and KPIs)
- [Institutional Effectiveness \(OIE\)](#) (for general resources)
- [Assessment](#) – (for assessment committee structure – roles)
- [Program Assessment](#) (for academic program assessment resources and dashboards)
- [OIE-Sponsored Technology](#) (for JobsEq, Qualtrics, and Nuventive)
- [Institutional Surveys](#) (for First Destination, Climate, and NSSE surveys)
- [Institutional Research](#) (for institutional data dashboards)

Review OIE Resources – Dashboards

- [KPI and Selected Metrics Dashboard](#)
- [IR Dashboards](#)
- [Program Assessment Dashboards](#)



Questions, Comments, Evaluate

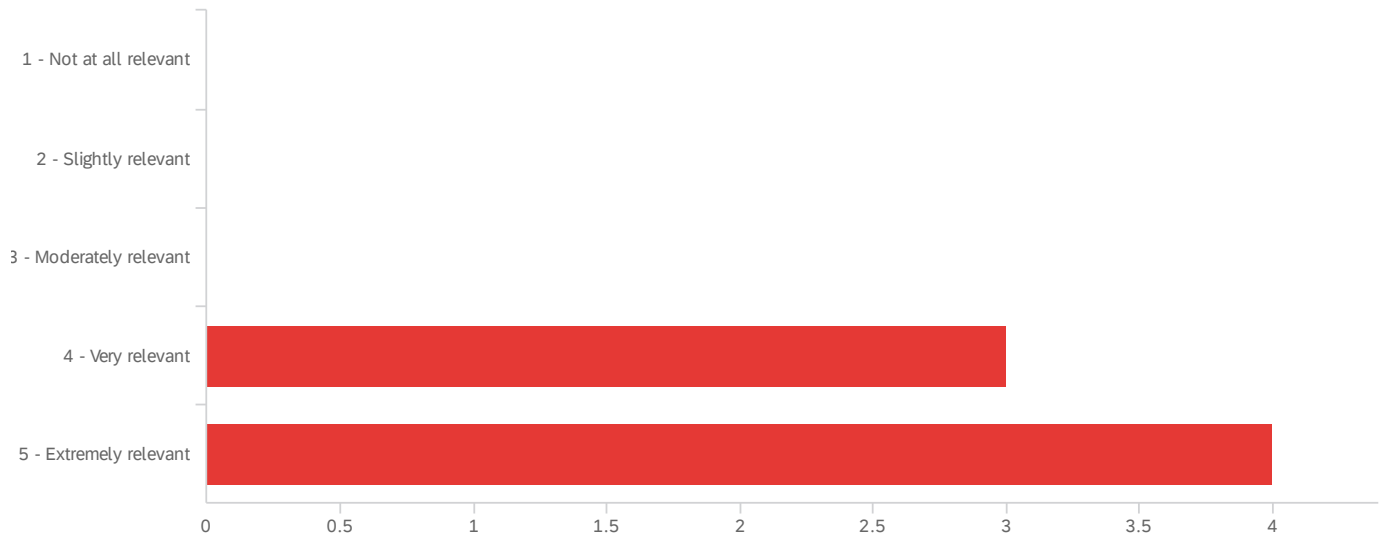


Appendix G: Administrative Unit Assessment Session 05 08 2025 Evaluation

Administrative Assessment Session 5-8-2025

May 12, 2025 4:36 PM EDT

Q3 - I found the content relevant to my work.



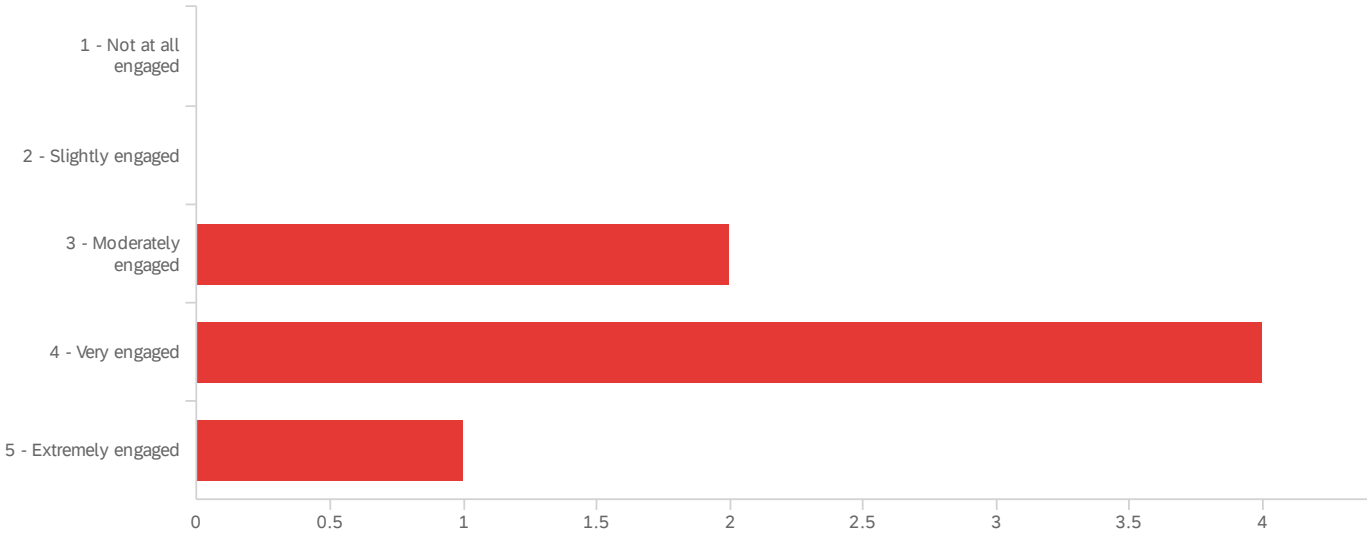
#	Field	Minimum	Maximum	Mean	Std Deviation	Variance	Count
1	I found the content relevant to my work.	4.00	5.00	4.57	0.49	0.24	7

#	Field	Choice Count
1	1 - Not at all relevant	0.00% 0
2	2 - Slightly relevant	0.00% 0
3	3 - Moderately relevant	0.00% 0
4	4 - Very relevant	42.86% 3

#	Field	Choice Count
5	5 - Extremely relevant	57.14% 4
		7

Showing rows 1 - 6 of 6

Q4 - I was well-engaged during the assessment session.

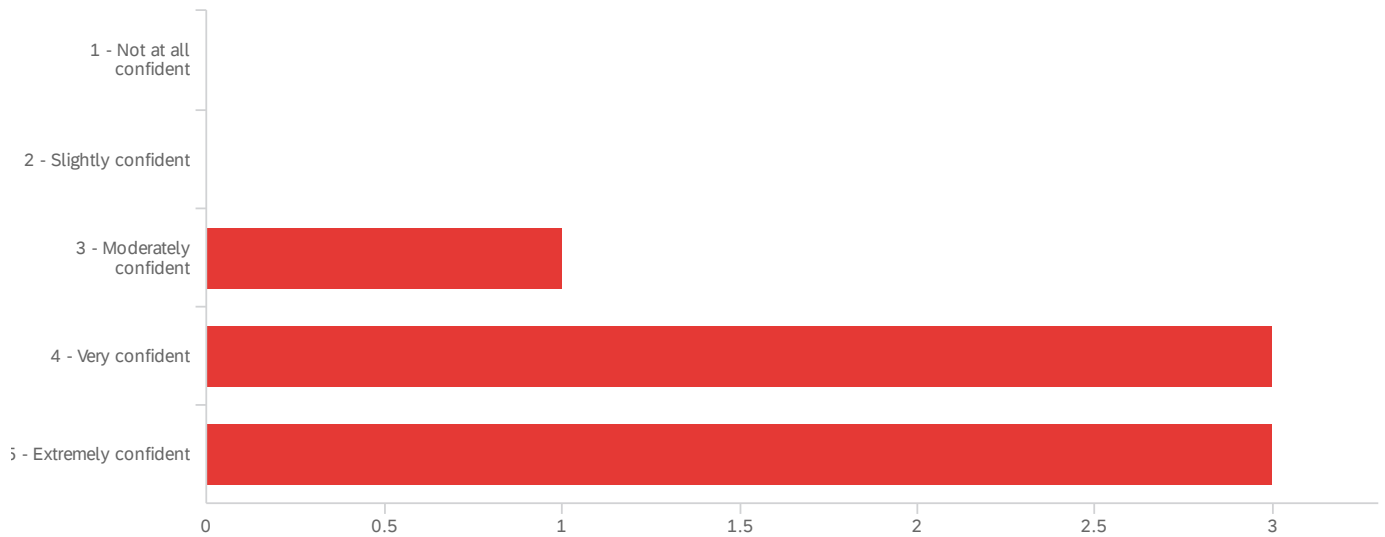


#	Field	Minimum	Maximum	Mean	Std Deviation	Variance	Count
1	I was well-engaged during the assessment session.	3.00	5.00	3.86	0.64	0.41	7

#	Field	Choice Count
1	1 - Not at all engaged	0.00% 0
2	2 - Slightly engaged	0.00% 0
3	3 - Moderately engaged	28.57% 2
4	4 - Very engaged	57.14% 4
5	5 - Extremely engaged	14.29% 1
		7

Showing rows 1 - 6 of 6

Q5 - I am confident I can apply what I learned today to my department's/program's assessm...

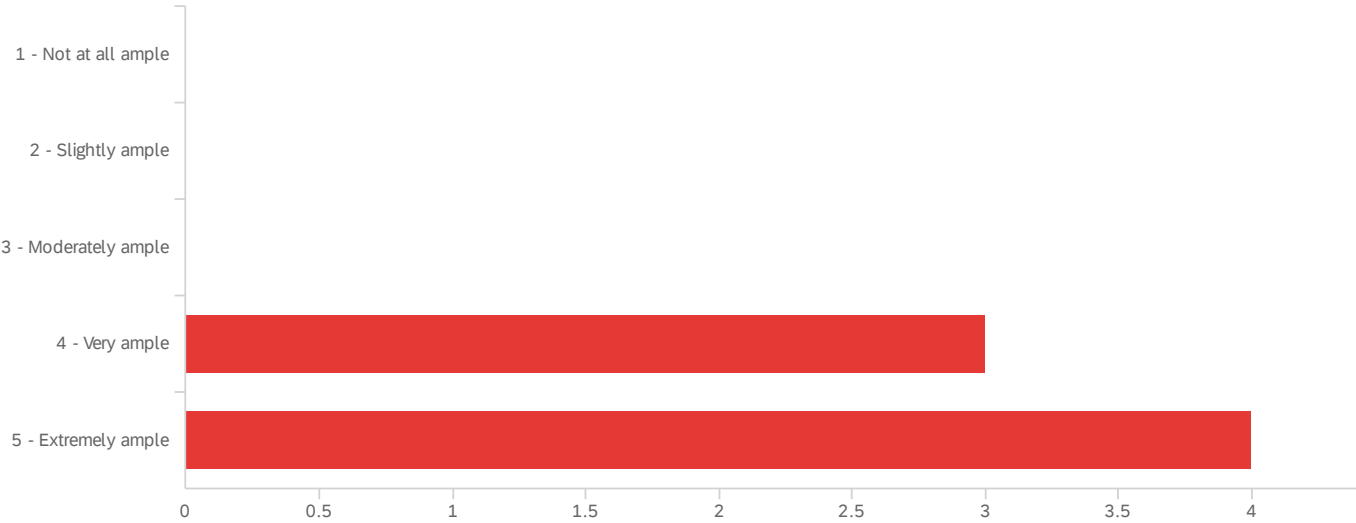


#	Field	Minimum	Maximum	Mean	Std Deviation	Variance	Count
1	I am confident I can apply what I learned today to my department's/program's assessment work.	3.00	5.00	4.29	0.70	0.49	7

#	Field	Choice Count
1	1 - Not at all confident	0.00% 0
2	2 - Slightly confident	0.00% 0
3	3 - Moderately confident	14.29% 1
4	4 - Very confident	42.86% 3
5	5 - Extremely confident	42.86% 3
		7

Showing rows 1 - 6 of 6

Q6 - I had ample opportunity to ask questions.

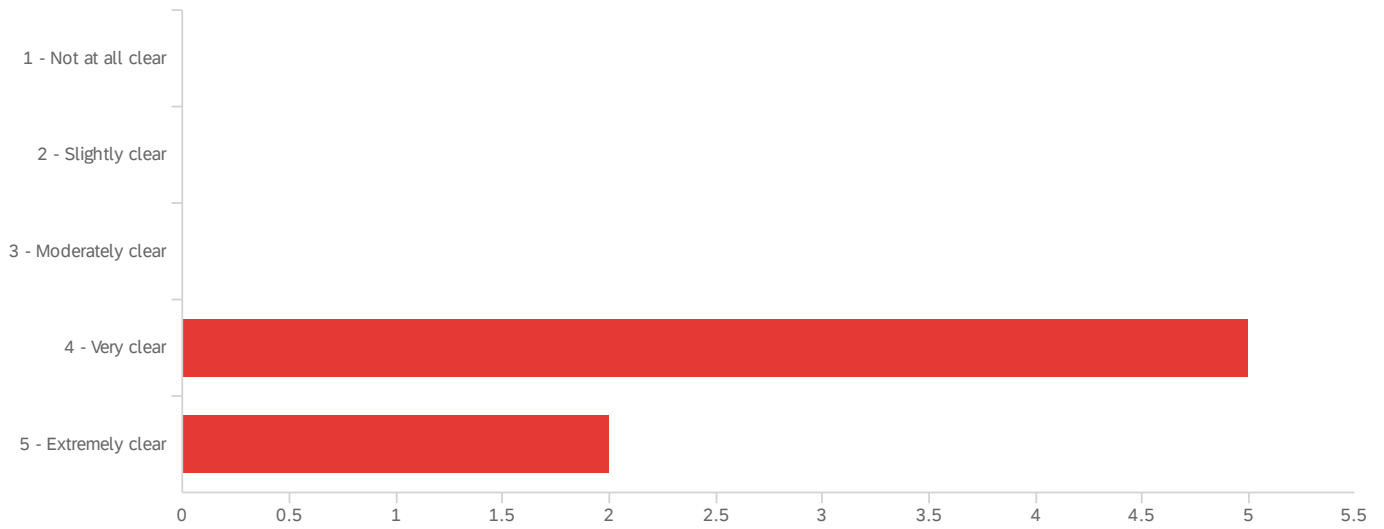


#	Field	Minimum	Maximum	Mean	Std Deviation	Variance	Count
1	I had ample opportunity to ask questions.	4.00	5.00	4.57	0.49	0.24	7

#	Field	Choice Count
1	1 - Not at all ample	0.00% 0
2	2 - Slightly ample	0.00% 0
3	3 - Moderately ample	0.00% 0
4	4 - Very ample	42.86% 3
5	5 - Extremely ample	57.14% 4
		7

Showing rows 1 - 6 of 6

Q7 - I am clear what is expected of me as a result of this assessment session.

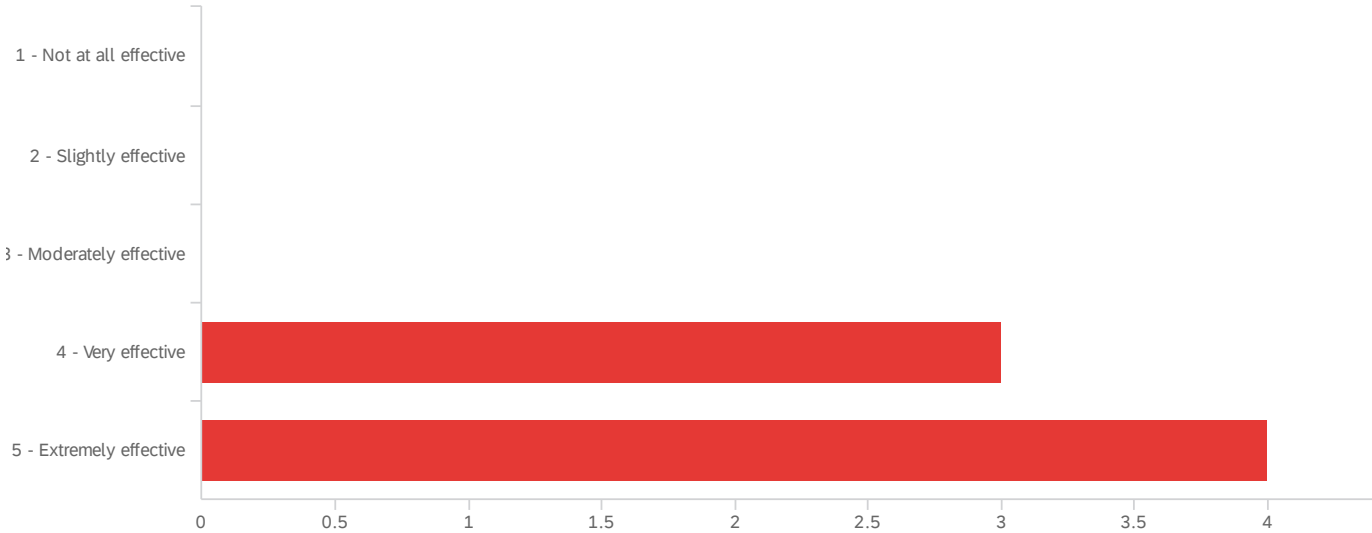


#	Field	Minimum	Maximum	Mean	Std Deviation	Variance	Count
1	I am clear what is expected of me as a result of this assessment session.	4.00	5.00	4.29	0.45	0.20	7

#	Field	Choice Count
1	1 - Not at all clear	0.00% 0
2	2 - Slightly clear	0.00% 0
3	3 - Moderately clear	0.00% 0
4	4 - Very clear	71.43% 5
5	5 - Extremely clear	28.57% 2
		7

Showing rows 1 - 6 of 6

Q8 - What is your overall rating for this assessment session?

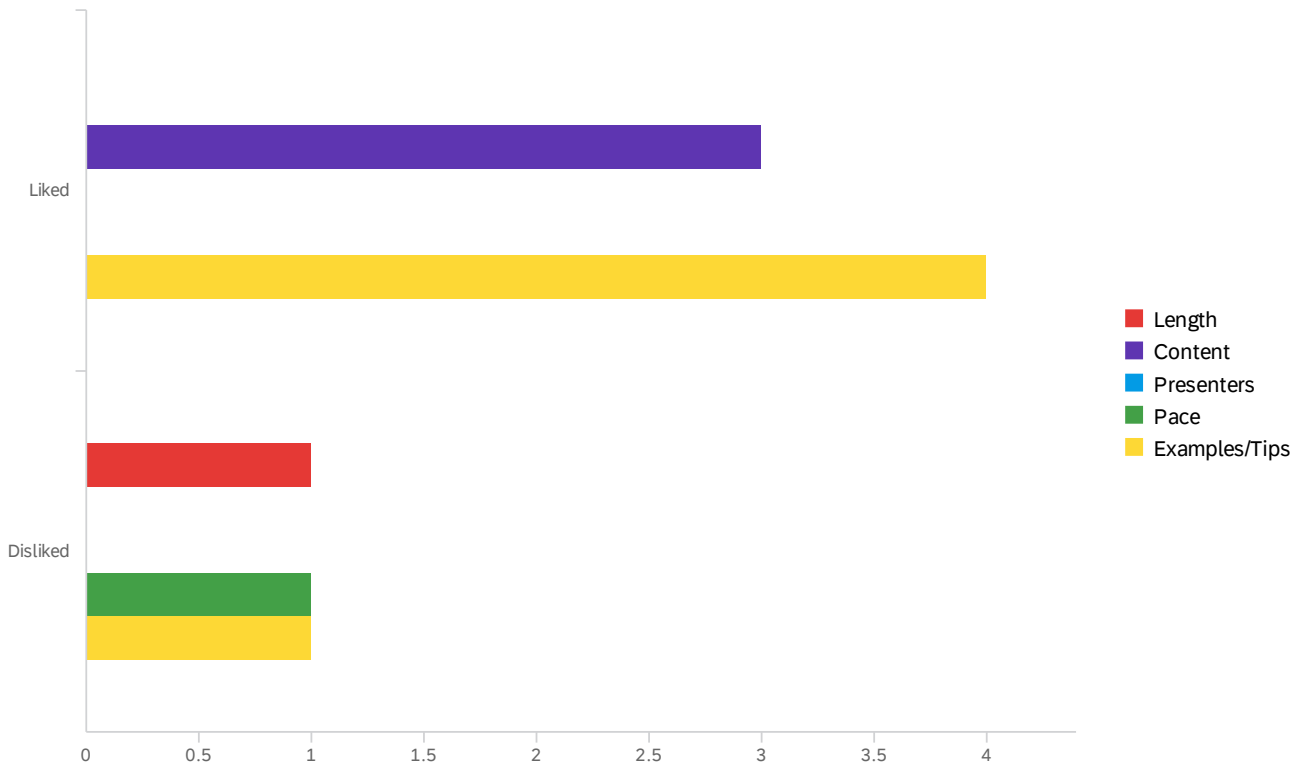


#	Field	Minimum	Maximum	Mean	Std Deviation	Variance	Count
1	What is your overall rating for this assessment session?	4.00	5.00	4.57	0.49	0.24	7

#	Field	Choice Count
1	1 - Not at all effective	0.00% 0
2	2 - Slightly effective	0.00% 0
3	3 - Moderately effective	0.00% 0
4	4 - Very effective	42.86% 3
5	5 - Extremely effective	57.14% 4
		7

Showing rows 1 - 6 of 6

Q9 - What did you like the most and the least about this assessment session?



#	Field	Minimum	Maximum	Mean	Std Deviation	Variance	Count
1	Length	2.00	2.00	2.00	0.00	0.00	1
2	Content	1.00	1.00	1.00	0.00	0.00	3
3	Presenters	0.00	0.00	0.00	0.00	0.00	0
4	Pace	2.00	2.00	2.00	0.00	0.00	1
5	Examples/Tips	1.00	2.00	1.20	0.40	0.16	5

#	Field	Liked	Disliked	Total
1	Length	0.00% 0	100.00% 1	1
2	Content	100.00% 3	0.00% 0	3
3	Presenters	0.00% 0	0.00% 0	0

#	Field	Liked		Disliked		Total
4	Pace	0.00%	0	100.00%	1	1
5	Examples/Tips	80.00%	4	20.00%	1	5

Showing rows 1 - 5 of 5

Q10 - Please explain why you disliked [QID9-ChoiceGroup-SelectedChoicesForA...

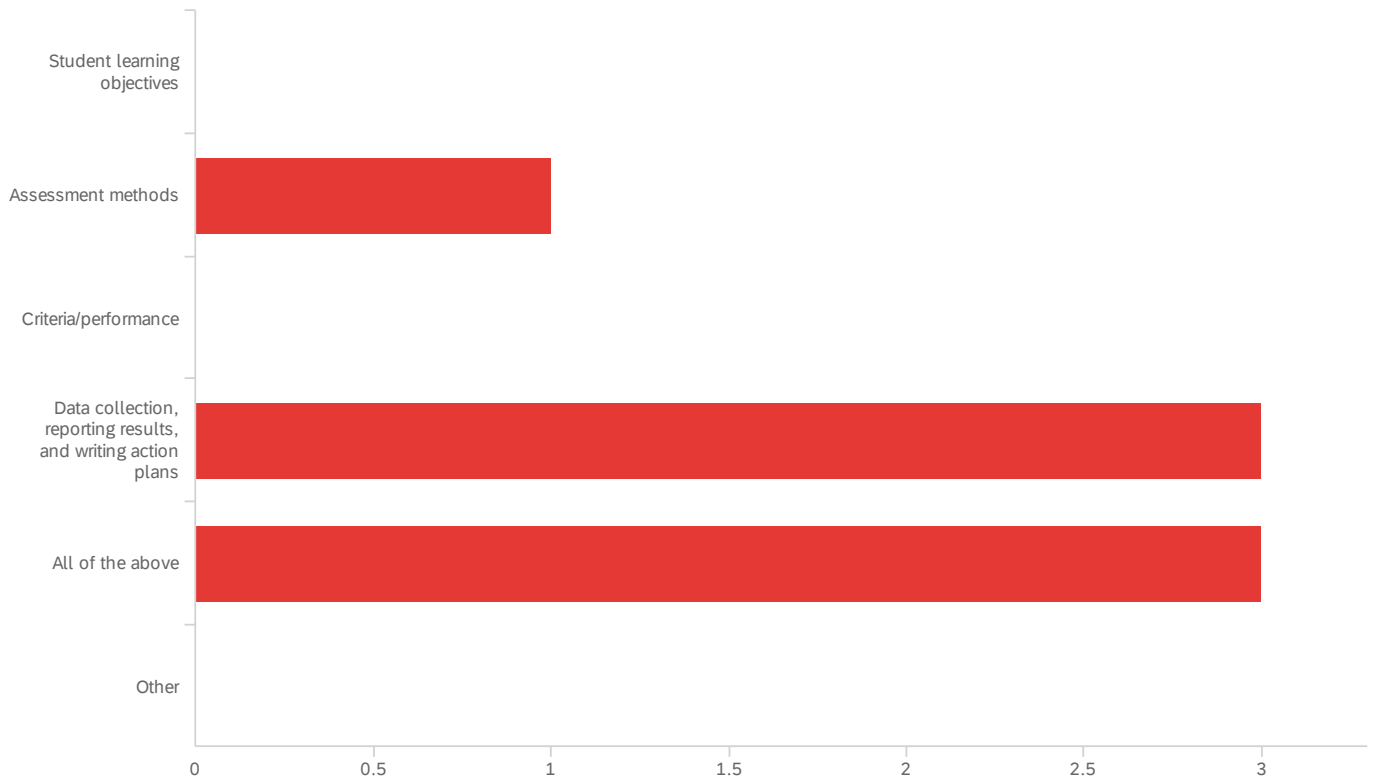
Please explain why you disliked [QID9-ChoiceGroup-SelectedChoicesForAnswer-...

I didn't really dislike the length, but needed to choose something. I actually felt that the length was adequate.

Would have liked to see audience members ask questions.

It might have been helpful to have more examples with explanations of why they were good? It was a minor suggestion - the whole meeting was great.

Q14 - For which of the following assessment topics do you wish you had more training or res...



#	Field	Minimum	Maximum	Mean	Std Deviation	Variance	Count
1	For which of the following assessment topics do you wish you had more training or resources:	2.00	5.00	4.14	0.99	0.98	7

#	Field	Choice Count
1	Student learning objectives	0.00% 0
2	Assessment methods	14.29% 1
3	Criteria/performance	0.00% 0

#	Field	Choice Count
4	Data collection, reporting results, and writing action plans	42.86% 3
5	All of the above	42.86% 3
6	Other	0.00% 0

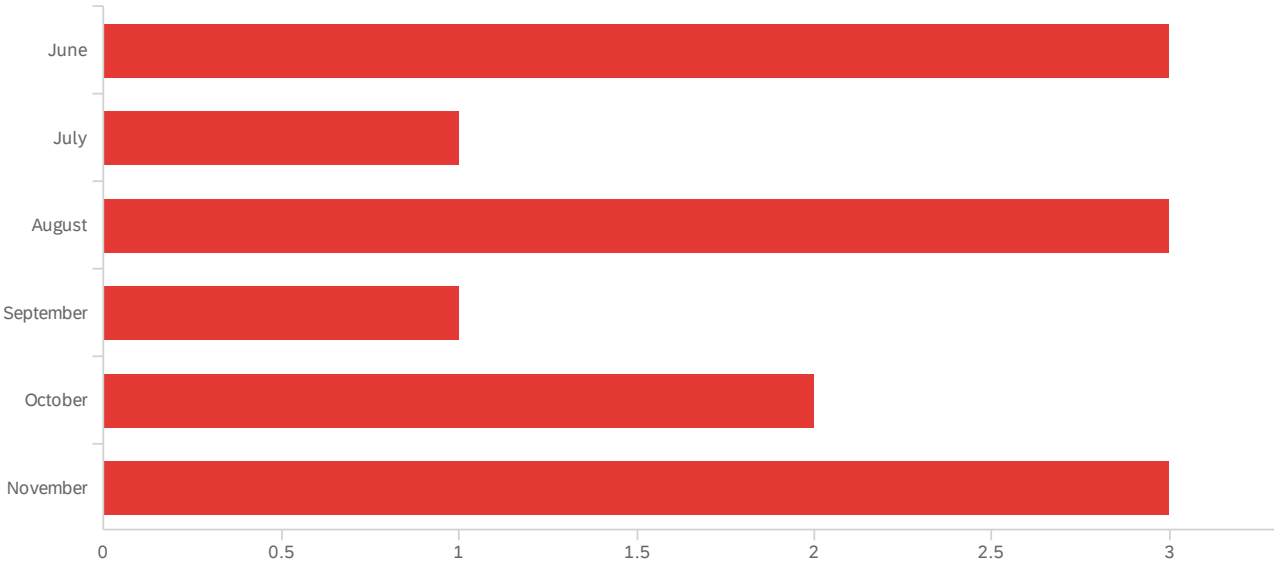
7

Showing rows 1 - 7 of 7

Q16 - Please tell us what topics interest you for future sessions.

Please tell us what topics interest you for future sessions.

Q15 - When would you prefer future assessment sessions to be offered (check all that apply):



#	Field	Choice Count
1	June	23.08% 3
2	July	7.69% 1
3	August	23.08% 3
4	September	7.69% 1
5	October	15.38% 2
6	November	23.08% 3

Q11 - Which, if any, of your questions were left unanswered by this assessment s...

Which, if any, of your questions were left unanswered by this assessment se...

Q: Are we to tie specific item purchases to both department and university goals?

How did the evaluation of our plans occur - who evaluated them?

None

Q12 - Any other questions/comments?

Any other questions/comments?

Q: Could we work with someone from your office to create department-specific dashboards that could be shared on our department website?

Thanks for offering this - very helpful.

I feel I better understand what is expected of my unit, and the institution. The training set us up to improve upon what we did last year, and hopefully improve the effectiveness of the unit in a how long desired goals.

Great job team! I always appreciate you all and your willingness to keep walking us through this

End of Report