ADMINISTRATIVE SUPPORT UNITS ASSESSMENT GUIDELINES

INSTITUTIONAL EFFECTIVENESS UNITS

(IE)

Updated August 2025

THE INTERNATIONAL

INSTITUTIONAL ASSESSMENT, RESEARCH & PLANNING

Abbreviations & Definitions

IE	Institutional Effectiveness Units
FAQs	Frequently Asked Questions
OIARP	Office of Institutional Assessment, Research, and Planning
OBJ	Objective

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Introduction to IE Assessment

Purpose

The purpose of IE assessment is to demonstrate a commitment to ongoing, comprehensive, and integrated research-based planning and evaluation processes that (a) focus on institutional quality and effectiveness and (b) incorporate a systematic review of institutional goals and objectives consistent with its mission. The information presented in each section of this manual defines Texas A&M International University's (TAMIU) expectations for the documentation of objective assessment. This "how-to" manual is designed to guide institutional effectiveness offices (hereafter referred to as *IE units*) through the assessment process and highlight best practices.

Components

The **Assessment Plan**, completed every Fall semester, identifies the objectives that will be assessed during the *upcoming* year (academic or fiscal), as well as the measures and targets used to assess each one. Units may identify as many objectives as they see fit to assess each year, but **at least two must be assessed annually**.

The Assessment Plan consists of the following:

- Division/Unit Mission
- Objectives
- Measures & Targets

The **Assessment Report** completed every Fall semester summarizes assessment results (i.e., findings) gathered over the course of the *previous* year, as outlined in the established Assessment Plan for that year.

The Assessment Report consists of the following:

- Findings

Roles

Over the course of the assessment cycle, assessment forms follow a 6-step workflow. Individuals in the following roles participate at one or various points in the cycle:

- **Program Coordinators**: Staff and/or unit leadership responsible for documenting and submitting Assessment Plans and Reports in HelioCampus Formerly AEFIS
- **Department Academic Liaisons**: Appointed individuals by the President or the Vice President of the division who work with OIARP to provide support and communicate expectations to Program Coordinators in their respective divisions; responsible for providing internal feedback on Assessment Plans and Reports. This position is commonly referred to as "office reviewer"
- **OIARP**: The University's administrative office that is responsible for providing support to those in the roles defined above as they participate in the annual IE assessment process; responsible for managing the assessment platform (HelioCampus) and publishing resources for users, as well as providing feedback and final comments on completed Assessment Plans and Assessment Reports

Guidelines Description

The components making up the Plan and Report are covered individually and in detail throughout this manual. The walkthrough sections of this companion manual follow the same order of the sections comprising the Assessment Plan and Assessment Report.

Component sections include:

- A description of the component
- Criteria for what each component should include and on which feedback is provided
- Examples
- Frequently Asked Questions (FAQs)
- Screenshots of what the components look like in HelioCampus

The information presented in each section of this manual defines Texas A&M International University's expectations for the documentation of IE assessment. This how-to manual is designed to guide IE units through this process, highlight best practices, and facilitate the review of Assessment Plans and Assessment Reports.

Please pay particular attention to the **callouts** with the red exclamation mark image on the left. These callouts mark important information.

Each section of this companion manual includes an FAQ section. The FAQs in **blue text** indicate information that addresses functionality within the HelioCampus Formerly AEFIS system. The HelioCampus logo on the left indicates callouts for important technical information about HelioCampus.

IE Assessment Deadlines

Deadlines for the AY2024-25 and AY2025-2026 assessment cycles are listed below, and visual representations of these workflows can be found in the Appendices.

AY2024-25 Deadlines

Workflow Step	Step Name (In HelioCampus Formerly AEFIS)	Assigned Role	Step Purpose	Submission Deadline*
Step 1	Program Coordinator Plan Submit	Program Coordinator	Draft Plan Submission	February 16, 2024
Step 2	Office Review Plan Checklist	Department Academic Liaison	Internal Division Approval and Feedback on Plan	March 1, 2024
Step 3	Program Coordinator Plan Submit	Program Coordinator	Revise based on Internal Division Feedback/ Submit Plan	March 8, 2024
Step 4	Assessment Office Plan Rubric	OIARP	OIARP Approval and Feedback on Plan	April 19, 2024
Step 5	Program Coordinator Plan Submit	Program Coordinator	Assessment Plan Returns to Program Coordinator for Reviewing Feedback and any Necessary Revisions	September 19, 2025
Step 6	Program Coordinator Report Submit	Program Coordinator	Draft Report Submission	October 03, 2025
Step 7	Office Reviewer Report Checklist	Department Academic Liaison	Internal Division Approval and Feedback on Report	October 17, 2025
Step 8	Program Coordinator Report Submit	Program Coordinator	Revise based on Internal Division Feedback/Submit	October 24, 2025

			Final Report	
Step 9	Assessment Office Report Rubric	OIARP	OIARP Provides Feedback and Approval on Report	November 28, 2025

AY2025-26 Deadlines

Workflow Step	Step Name (In HelioCampus Formerly AEFIS)	Assigned Role	Step Purpose	Submission Deadline*
Step 1	Program Coordinator Plan Submit	Program Coordinator	Plan Submission	October 31, 2025
Step 2	Assessment Office Plan Rubric	OIARP	OIARP Provides Feedback and Approval on Plan	November 28, 2025
Step 3	Program Coordinator Report Submit	Program Coordinator	Report Submission	August 14, 2026
Step 4	Office Reviewer Report Checklist	Department Academic Liaison	Internal Division Approval and Feedback on Plan and Report	September 11, 2026
Step 5	Assessment Office Report Rubric	OIARP	OIARP Provides Feedback & Approval on Report	October 16, 2026
Step 6	Program Coordinator Submit Acknowledgement	Program Coordinator	Submit Acknowledgment	November 20, 2026

*The submission deadline denotes when the form needs to be submitted to the *next* workflow step. For example, in the 2023-24 cycle, the deadline for forms at Step 3 to submit to Step 4 is March 10, 2023.

Using HelioCampus to Document Annual Assessment

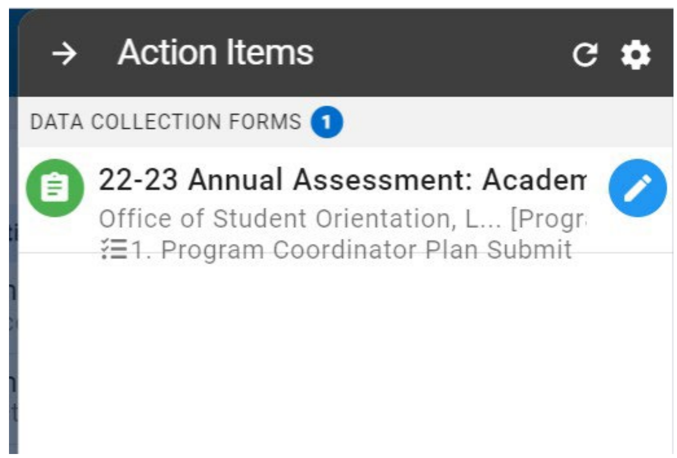
Getting Started

Program Coordinators responsible for the submission of Assessment Plans and Reports are called **Program Coordinators** in HelioCampus. Program Coordinators use their NetID and password to log in to HelioCampus (tamiu.aefis.net).

Newly appointed Program Coordinators should refer to the HelioCampus User Guide for specific instructions on logging in, accessing, and submitting Assessment Plans. This visual guide includes helpful tips, things to remember, and information about system features that Program Coordinators may find useful. The following information covers the basics of using HelioCampus for program assessment.

Accessing Assessment Forms

Assessment forms assigned to Program Coordinators will appear in the Action Items list on the right side of the screen into HelioCampus. Click the blue pencil icon to edit the information in the assessment form.



If the Action Items list does not automatically appear, it can be accessed by clicking on the bell icon at the top right of the screen in the blue bar, which is pictured below.

Please pay particular attention to the academic year listed on the form in which you are working. At any given time, there are **two** active assessment cycles—the cycle for which the Plan is being documented and the cycle for which assessment data is being collected and the Report is being documented. Sometimes those forms will be visible in the Action Items list at the same time. Program Coordinators should verify they are working in the intended form.

Upon opening the 25-26 assessment form for the first time, Program Coordinators will find information is already entered in some fields. The following information has been pre-populated in the 25-26 forms (from the previous cycle's forms):

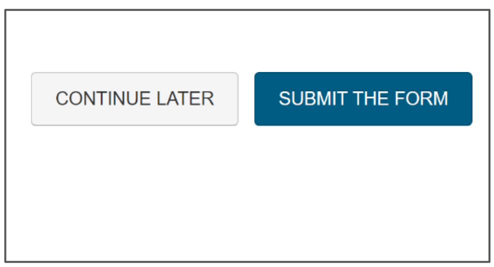
- All Objectives

New divisions/units will not have any information pre-populated in their 23-24 forms.

Submitting Assessment Forms

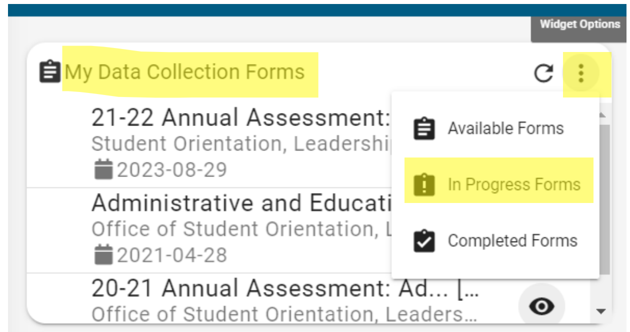
Over the course of the assessment cycle, Program Coordinators will submit the Assessment Plan during Step 1 and the Assessment Report during Step 3. See the Appendices for a visual representation of the assessment cycle.

Upon submitting the Plan, it will be sent to the Assessment Office after Step 1 for the Assessment Office Plan Rubric. Simply click the "Submit the Form" button at the bottom of the form to submit it.



After receiving feedback and approval on the Assessment Plan from the Office of Institutional Assessment, Research, and Planning (i.e., when the form is at Step 3), Program Coordinators will then be able to input the report findings. Simply use the "Continue Later" button to save any changes made to the form. The form will conveniently remain in the Action Items list over the course of the academic year as assessment data is gathered.

How to Locate Assessment Forms Not Showing on Your Action Items

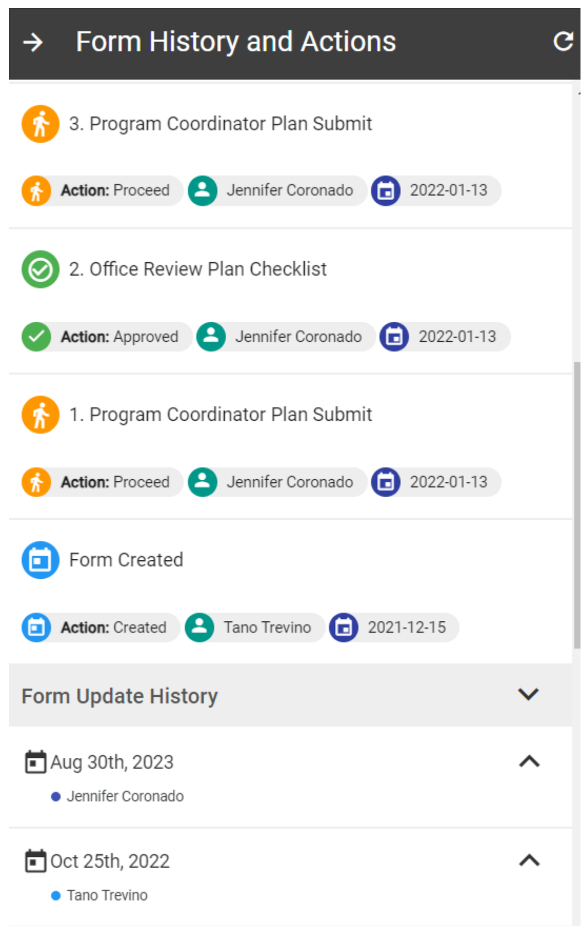


After the Program Coordinator submits a form, it will no longer appear on their Action Items list. However, Program Coordinators can view read-only copies of submitted forms from their HelioCampus dashboard widget labeled "My Data Collection Forms." Simply click the three-dot icon at the top right of the widget and filter by "In Progress Forms."

Completed assessment forms from previous cycles (e.g., AY 22-23, AY 23-24) can also be accessed from this widget. Simply select "Completed Forms."

Form History 

HelioCampus tracks the changes made within assessment forms and the progression of assessment forms through the workflow. While in a form, you can review this information by clicking the clock icon at the top right of the form (pictured above).



The resulting menu has two sections:

- **Form Actions.** This section shows the submission history of the form, including date, time, whether the form was sent forward in the workflow (Action: Proceed or Action: Approve) or backward (Action: Rejected), and by whom.
- **Form Update History.** This section shows a list of dated sessions in which the Program Coordinator, Office Reviewer, and/or OIARP staff member was making edits in the form. Each section is date-stamped and labeled with the user's name.

Expand a section by clicking the caret (^). This view will show each individual change that was made in the form (timestamped). Clicking on an individual change/update will automatically navigate you to that section of the form.

This feature is useful if more than one Program Coordinator is responsible for entering information in the assessment form. It provides a total history of what has been entered, when, and by whom.

Email Notifications

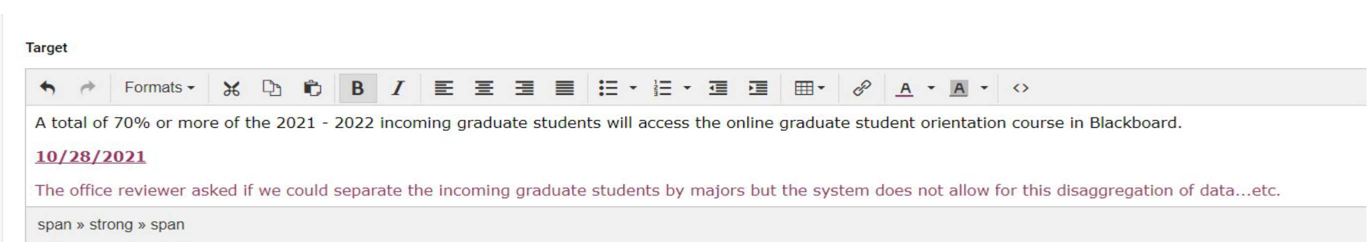
When feedback is submitted to Program Coordinators—whether from the Office Reviewer or OIARP staff—the system automatically sends an email notification indicating that an assessment form is available on the Program Coordinator's Action Items list. The sender of these notifications is listed as "TAMIU AEFIS System," but the notifications are sent automatically by the HelioCampus system. **Please read these email notifications carefully as they provide important information, such as who provided feedback, next steps and future deadlines, and technical information about the HelioCampus system.**

If you have a student (@dusty.tamiu.edu) and a work (@tamiu.edu) email address, you may need to forward these notifications from your student account to your work account. HelioCampus receives a nightly update from Banner, the University's Student Information System, during which student email addresses could overwrite work email addresses. If you do not believe you are receiving notifications, please check your student email account and set up the forwarding function.

Responding to Feedback

Office Reviewers provide feedback on Assessment Plans and Reports twice over the course of the cycle (Steps 2 & 7). Beyond making revisions or updates to the Plan/Report itself, there may be some cases in which the Program Coordinator wishes to respond to the feedback (e.g., perhaps because the recommended revision cannot be made, and the Program Coordinator wishes to provide an explanation).

To respond to the feedback provided in your form, simply type your response in the text box that includes the content on which the feedback was provided. That is, if the Office Reviewer provided feedback on a target, type your response in the target text box. OIARP recommends *dating* your response, as well as making the text a *different color* so that it stands out from the other content in the text box. See below for an example:



Division/Unit Mission

In this first section of the Assessment Plan, Program Coordinators are asked to provide their division/unit mission. When developing or refining your mission statement, consider the following:

1. Who are you as a unit?
    a. Does the office/unit mission state your office's name.
    b. Avoid vague pronouns like "Our mission is…"
2. What does your office/unit do?
    a. Include the primary functions or actives of the office/department.
    b. Illustrates the most important functions, operations, objectives and/or offering of the office/department.
3. Why does your office/unit do what you do?
    a. State the purpose of the office/department.
    b. Should include the primary reasons why you perform your major activities or operations.
4. For whom do you provide services for?
    a. These are the stakeholders (e.g., students) of your office/department.

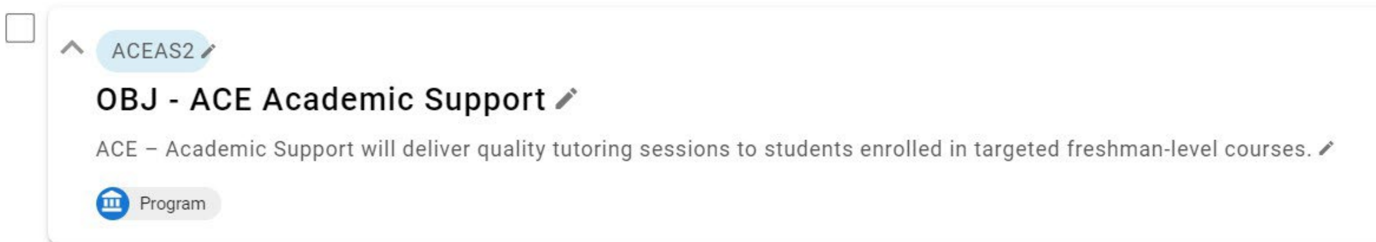
Division/Unit Mission FAQs

Q: Do we have to continually change the mission? Can we just leave it as it is?

A: The existing information as it pertains to the mission of the unit can stay the same, but Program Coordinators are encouraged to refer to previous year's forms to see if there was any feedback provided in which revisions were suggested.

Objectives

The primary purpose of IE assessment is institutional effectiveness and efficiency with which the unit operates and/or provides services to stakeholders. This process begins with an examination of the unit's core objectives. Strong objectives identify these key services and operations and define what they would look like in a high-functioning unit.



All IE divisions/units are expected to establish a minimum of three objectives that comprise the unit's comprehensive Assessment Plan. However, these objectives may be assessed on rotation. Leadership and staff should determine the most meaningful course of action for annual assessment, whether that means focusing on two objectives or all objectives. Some divisions may have specific internal requirements regarding objectives that are to be assessed. **Units are expected to meet the minimum requirement of assessing at least two objectives per assessment cycle.**

Objectives

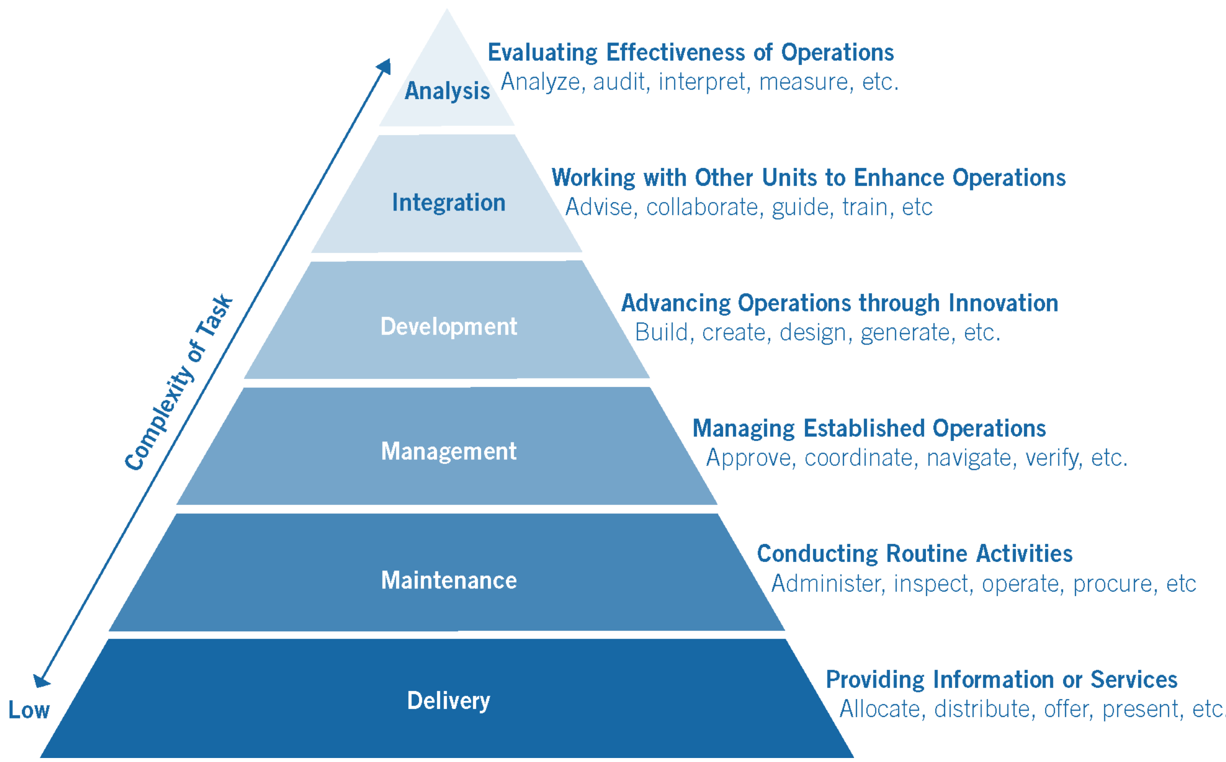
Divisions and units develop objectives based on Shults Dorimé – Williams (SDW) Taxonomy. The SDW Taxonomy provides IE units with a method of organizing and describing the complexity of tasks performed within their respective areas.

Shults Dorimé – Williams (SDW) Taxonomy

Shults Dorimé-Williams (SDW) Taxonomy provides IE units with a method of organizing and describing the complexity of tasks that are performed within their respective areas. The domain areas in which the Shults Dorimé Taxonomy exist are seen in figure 1 below:

Figure 1

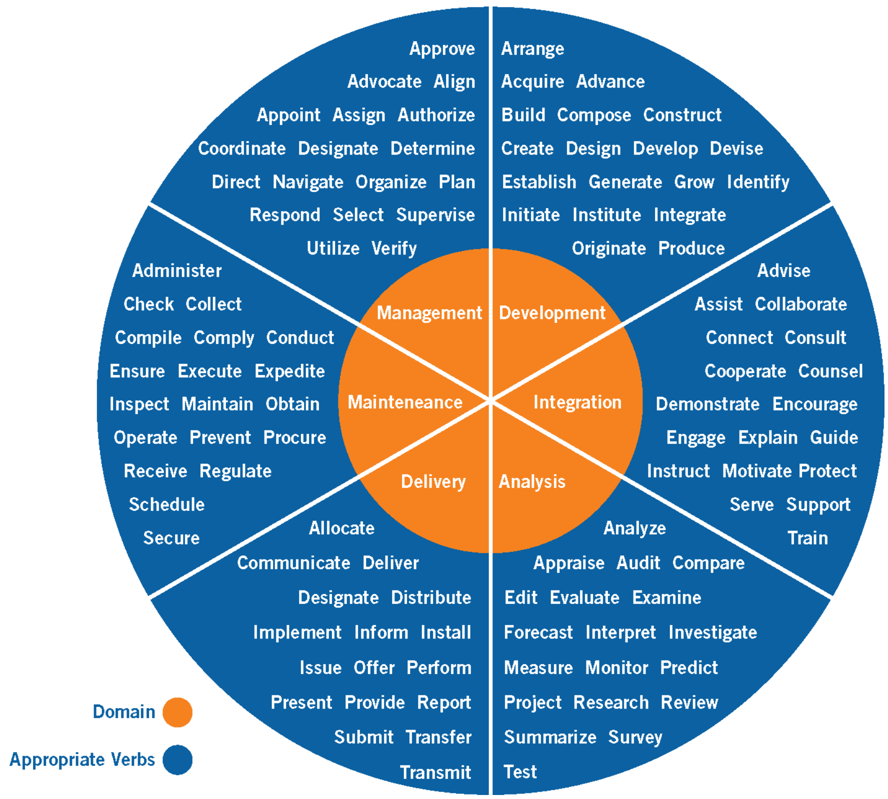
Shults Dorimé Williams Support Objectives Taxonomy



Additionally, the taxonomy provides a verb wheel (Figure 2) which helps to develop the objective sentence once the domain has been selected for the division/unit.

Figure 2

Support Objectives Verb Wheel



Moreover, descriptors pertaining to the objectives' goals of appropriateness, completeness, consistency, quality, and timeliness can be found in Figure 3.

Figure 3

Descriptors

Appropriateness	Completeness	Consistency	Quality	Timeliness
Appropriately	Accurate	Consistent	Acceptable	Concise
Increase/Decrease	Complete	Constant	Adequate	Efficient
Meaningful	Comprehensive	Continually	Clearly	Prompt
Necessary	Fully	Reliable	Competent	Timely
Needed	Integrated	Seamlessly	Correctly	Updated
Reduce/Expand	Systematic	Uniform	Effective	
Relevant	Thorough		Excellent	
Required			Quality	
Specific			Satisfactory	
Targeted			Sufficient	
Useful				

Examples of using the Taxonomy:

- The unit will respond to all inquiries and requests in a timely manner. (Management - Timeliness)
- The unit will produce meaningful, digestible reports for various stakeholders. (Development - Appropriateness)
- The unit will provide students utilizing [specific service] sufficient service. (Delivery - Quality)

Criteria

1. *OBJs reflect what is accomplished at the end of or as a result of the program/activity/service/workshop/training/etc.*

OBJs are written to reflect the objective or objective of the division's/unit's operations or services. They should not reflect something that has no relation to the operations or services of the division or unit. However, this does not mean objectives should focus on completion of a task or a project. Objectives should not reflect the completion of a task or a project as this is not appropriate for IE assessment.

2. *Two OBJs are tested in a cycle.*

As stated previously OBJs selection per cycle is a minimum of two per cycle. However, all OBJs for a division/unit must be tested once within three years.

3. *OBJs are written clear enough to infer action and measurability.*

OBJs should establish what is expected of the division/unit providing a rich description of the task domain. Additionally, the OBJs should contain precise verbs that promote measurability, avoiding vague words (e.g., understand, know, appreciate, etc.).

OBJ FAQs

Q: Why can't we include objectives about completing a task or project?

A: If the division/unit is working toward completion of a project or task, the focus of the objective should be on the *impact* of the completed project or task (i.e., effectiveness, efficiency, or stakeholder/customer perception). Objectives that can be measured dichotomously (e.g., "Completed/Not Completed") do not typically provide sufficient insight or information to guide decision-making, nor do they fit the cyclical assessment process facilitated by this reporting structure.

Q: Do we have to measure the same objectives every year? / Can we measure the same objectives every year?

A: Unit staff and leadership should guide the assessment process, determining which objectives are to be measured and when. Some units place their objectives on two- or three-year rotations, focusing on just one or two each year. In any case, assessment planning should be an *intentional* process. For some units this might mean measuring the same objectives annually, and in other units this might mean measuring them on rotation. Even units that assess their objectives on a planned rotation might need to deviate from their rotation from time to time, depending on the current needs of stakeholders or changing priorities.

Q: If we plan to make significant changes to one of our objectives, should we revise the existing objective or add a new objective in the assessment form?

A: If the revision is one that will fundamentally change how that objective will be measured (e.g., changing a Customer Satisfaction objective to an Operational Efficiency objective), **always add a new objective instead of simply revising the existing objective.** This ensures that the old version of the objective remains intact and tied to its relevant measures in assessment forms from previous cycles. Add the new objective and simply de-select the old objective to indicate that it will not be assessed in the current cycle. These outdated objectives can be permanently deleted later.

Q: Can I de-select an objective (i.e., un-check the checkbox) after I've finished entering all the information for it?

A: As long as the objective is selected/check marked again prior to submission, it's okay to de-select the objective while you're working. Minimizing an objective by unchecking it may make the form easier to navigate while you're actively working in it. However, if you do not remember to select the objective again, that information will not move forward in your submission.

Q: We are adding a new objective—what should we enter in the Objective Code field in the assessment form?

A: The Objective Code is an identifier no more than 20 characters long. We suggest naming your objective code your OBJ #. Additionally, you can add your program name if you wish, but it is unnecessary.

Measures & Targets

Measures

A **measure** describes the method of collecting and evaluating assessment data. A strong measure description makes the assessment strategy easy for internal stakeholders to replicate and easy to understand for an external party who is not intimately involved in the day-to-day operations of the unit/division.

Measures can be direct or indirect. **All OBJs must be assessed with two measures with one of those being a direct measure.**

Direct Measures designed to measure the efficacy of services, programs, initiatives, etc. within areas that test objectives not related to student learning. These types of objective measures may relate to efficiency of processes, effectiveness of programs, etc. Some examples of direct measures are:

- Activity Accuracy
- Activity Volume
- Industry Standards
- Number of users who access or participate in services
- Retention rates

Indirect measures provide secondhand information about student learning and the division's/unit's effectiveness or efficiency of its operations or services. Whereas direct measures are concerned with the *quality* of work as it relates to certain OBJs/SLOs, indirect measures are indicators of attitudes, perceptions, feelings, values, etc. Often, indirect measures are too broad to depict the achievement of specific OBJs/SLOs. Some examples of indirect measures are:

- Focus groups
- Interviews
- Debriefing sessions
- Open-text responses on surveys

Targets

A **target** is the level at which a unit considers their objective to be "met" on a given measure. Strong targets are clear levels of achievement. Below are some examples of acceptable targets. Keep in mind some of these examples are generically worded; units should include contextual information from the measure description in their targets.

- 75% of service requests will be acknowledged within 24 hours.
- 90% of reports will be submitted on time.

Below are some examples of **unacceptable** targets with accompanying explanation.

- All participants will engage in the focus group.

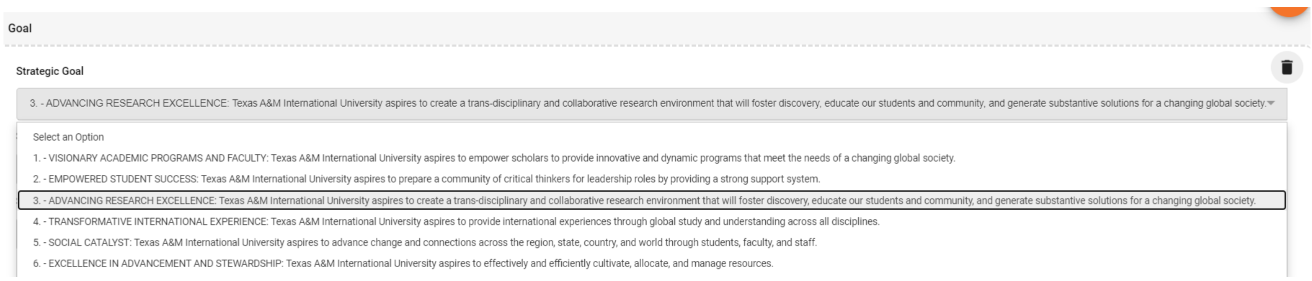
In this case, the statement likely does not align with the objective. The objective is not about the quality of the focus group interview, but rather about the quality of the service the focus group participants utilized. In other words, the purpose of the focus group is not the participants' engagement in the focus group; the goal should be to determine the effectiveness of the service, gather information about the user experience to make the program as effective as it can be, and/or identify what populations are not well served by the program.

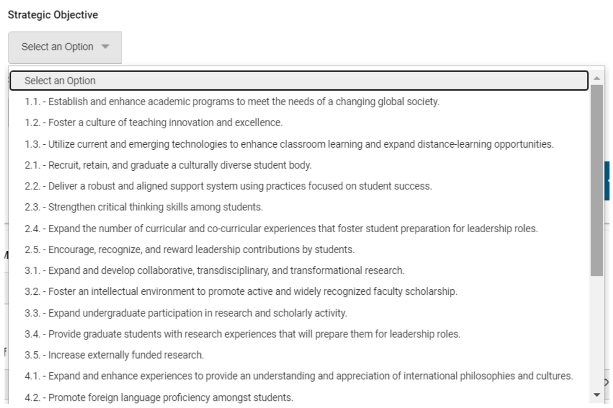
- Service requests will be acknowledged this cycle faster than the last cycle.

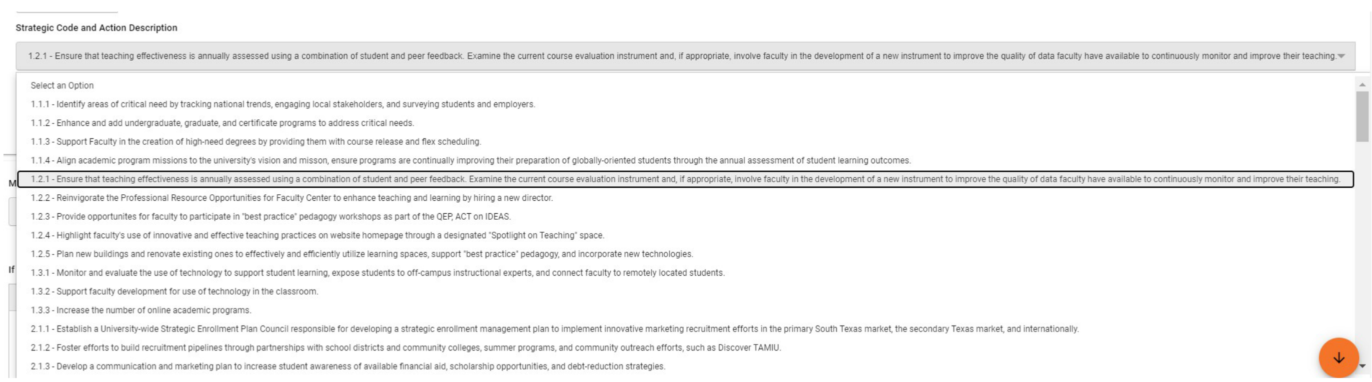
In this case, the statement does not provide a quantifiable and measurable target. We want outsiders to look at the target and determine the goal for this cycle so that when we see the findings, we can readily see if the goal was met or not met. A target of an increase may be possible, but we want to quantify what that increase looks like.

Strategic Goal Association

For each measure in the Plan, Program Coordinators are prompted to select the strategic goal alignment, strategic objective alignment, and strategic code and action description alignment from three separate dropdown menus in HelioCampus.







The first dropdown, strategic goal, is a mandatory selection, the other two selections are optional. You also have a button below the three dropdowns to add an additional goal if you wish. Please, only select strategic alignments *directly* related to the measure being recorded.

Measures and targets are reviewed based on the criteria described below.

Criteria

1. *Source of data and intended use is clear*

The information in each measure description should provide a clear picture of (1) where the data are coming from and (2) how the data are to be evaluated and reported. Many processes for measuring objectives are automated (e.g., software that generates a number, results extracted from a database such as Compass). In such cases simply indicate the primary source of data and the format in which they will be reported (number, percentage, average, etc.). For less automated collection methods, such as focus groups, the questions that align with the objective should be identified.

2. *Measure is consistent with the objective as defined.*

This criterion focuses on the *alignment* of the measure with the targeted objective. That is, is the measure capable of adequately capturing the achievement of the objective as it is defined? Also, consider whether the methodology is appropriate given the description of the objective. The measure(s) should reflect sound assessment practices, designed to provide usable and interpretable results.

3. *Target(s) include the minimally acceptable performance level or threshold.*

Strong targets have the following characteristics: (1) Alignment with the measure and objective in terms of language and specificity and (2) the level at which the targeted objective is determined to be "met" or achieved should be clearly stated.

4. *All referenced or relevant documents are attached or sufficiently described.*

Surveys, spreadsheet templates, sample reports, rubrics, focus group questions, or other instruments used for data collection and reporting may be attached to the assessment form in HelioCampus as supporting documentation. Alternatively, the Program Coordinator may instead choose to provide a detailed description of the instrument(s) in the Measure Description text box. For example, if an item on a customer satisfaction survey is used to gather data on a targeted objective, the unit may choose to attach the survey instrument and indicate the item number, or they may include in the measure description the exact text of the survey item and the scale on which customers are asked to respond to the item.

Please note the supporting documentation box appears in the reporting stage, but you are allowed to upload in planning if you wish. Refer to HelioCampus guide on how to do so.

Measure & Target FAQs

Q: Should we use more than one measure to assess an objective? Do we have to use more than one measure?

A: Yes you must use two measures. A single measure might only provide limited information about the extent to which objectives are achieved. Very broad objectives might call for three measures to determine whether it was achieved or not. Units are encouraged to use multiple measures because doing so provides a more complete picture of effectiveness and/or efficiency of unit processes. As a byproduct, utilizing multiple measures will help facilitate conversations about continuous improvement.

Q: The details of the method are not finalized by the due date of the plan in HelioCampus. What can I do to provide the requested level of detail?

A: The Measures & Targets section can be updated when the details of the method are finalized. For example, if your unit plans to conduct a focus group but the questions have not yet been finalized, the Program Coordinator should enter any available details and potential questions of the plan in HelioCampus by the due date. After the questions have been finalized, the questions that align with the objective can be added to the form in.

Q: Do the file names of uploaded supporting documents matter?

A: The file name of a supporting document should be descriptive enough that it is clear to a reviewer how it relates to the measure to which it is connected. If supporting documents are sometimes revised year-to-year, we suggest instituting a naming convention that includes the assessment cycle to which the document is relevant.

Q: How often, if at all, should targets be updated?

A: Staff and unit leadership should revisit targets annually and update them as necessary, particularly if the targets are met year after year. Targets that are consistently met every year may also be a sign that other methods of measuring the objective should be explored. It is considered good practice to rely on multiple measures for evidence of an objective.

Q: Do we have to justify our targets?

A: Although not mandatory, including a brief description of the origins or rationale for each target will likely prove to be beneficial in the future when targets are being reviewed and/or when other individuals become involved in the assessment process. These explanations are particularly useful when targets are based on state standards and other external requirements. Justifying target is considered an exemplary score on the IE rubric.

Q: We have more than one target for one of our measures—how should we indicate this in the assessment form?

A: You might want to consider if these are multiple measures. Is it a secondary target? Meaning that the minimum threshold is "80% will turn this document on time," and the secondary target is "no more than 5% will be one week late." If your second target is a secondary target go ahead and include it in the same text box as your target.

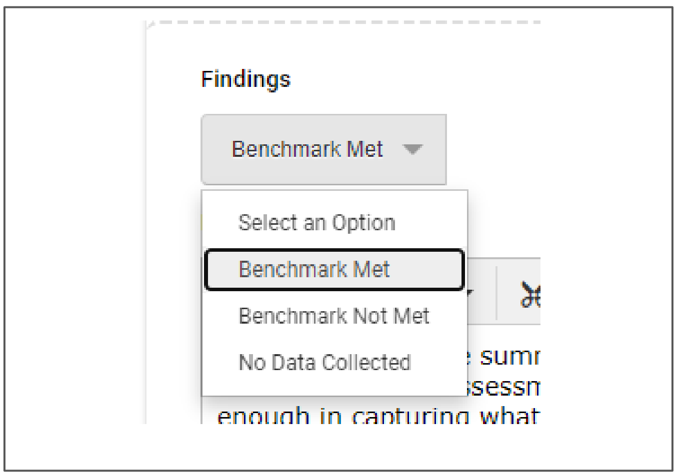
If the second target is a true second target on the same project, event, service, etc. then this might constitute a second measure. Contact OIARP and your office reviewer to see what works best.

Findings

Findings are the results from analysis of assessment data. Strong Assessment Reports will consistently communicate findings in a clear manner using language that aligns with the related measure and target.

In addition to the findings statement itself, divisions/units should select the appropriate designation— whether the Target was “Met,” or “Not Met,”—from the provided list. As a reminder, divisions/units are *not* penalized if their target(s) are not met.

What is important with any target and finding is that there is reflection.



If there are no findings to report for a given measure/target, units may select the third target status indicator—"No data collected” If this option is selected, please provide a brief explanation in the appropriate text box.

Criteria

1. *Discusses the current findings as they relate to previous assessment findings or other relevant trends.*

The findings are reported in the “Findings” text box in the HelioCampus assessment form. Additionally, in this text box divisions/units should briefly reflect on how the current findings compare to the findings from the last time the OBJ was measured. If possible, findings should be discussed in the context of past results, as the longitudinal pattern of findings can provide valuable information to the division/unit. If a mean result is reported, it may be useful to report the sample size along with the mean to provide further context for the finding. If the

OBJ has not been assessed before, what do the findings imply about the achievement of the objective/objective? Are there any other contextual factors that might be relevant?

2. *Where appropriate, specific/unique populations(s) served is/are discussed* ***(if applicable)***

IE divisions/units can identify the ways in which they provide support to different unique student populations and/or how unique student populations experience the services provided by the unit. **Findings have the option to disaggregate for the identified unique student population(s) served by the unit (e.g., student classification, by college, etc.).** See FAQs for more information.

Findings FAQs

Q: All of the targets were met, which is an indication that the unit is functioning well. Can we just say that in the Findings Description text box?

A: Saying simply that the findings are an indication that the unit is functioning well is essentially the same as indicating the target is "Met." The reflection should go one step further by contextualizing the results. This can be done in a variety of ways, but one of the most powerful ways to discuss the meaning of results is to describe the longitudinal trend. How has the division/unit performed on this OBJ/measure over the past few assessment cycles? Is progress being made?

Q: How should finding statements be structured?

A: There is not a prescribed template all finding statements must follow. However, the following is a template that units might find useful:

- **First sentence:** Present the assessment results in the context of the measure (e.g., 86% of respondents indicated that they were either Satisfied or Extremely Satisfied with the training session.).
- **Second sentence:** Reiterate the target, stating whether it was met, not met, or partially met (e.g., The target of 80% indicating they were Satisfied/Extremely Satisfied was met.).
- **Third sentence (second text box):** Contextualize the results by discussing longitudinal data trends, presenting other supporting data (if available), and/or by reflecting on the results.

Q: Should we upload supporting documentation for our findings? If so, what are some examples of appropriate documentation?

A: Supporting documentation in the Findings section is mandatory. The best supporting documentation is documentation that the division/unit has met to discuss the results and it is encouraged to show that decisions based on the results are made (minutes, email thread, zoom transcript, etc.). Additionally, some units may find it useful to upload documents that further illustrate their findings (reports, charts and graphs, raw data, etc.), as HelioCampus becomes a central location for that information from year to year. **Please ensure that uploaded documents do not include any identifying information**. You will upload this documentation in the supporting documentation area located below the action plan box.

Office Reviewer Approvals

Division leadership should be actively engaged in the program assessment process, particularly when it comes to reviewing assessment data and developing data-informed actions. In addition, division leadership plays an important role in the division approval of Assessment Plans and Reports. The Department Academic Liaison role as defined in HelioCampus, hereafter referred to "Office Reviewer" in the annual Assessment Review process allows Vice Presidents (and/or Associate Vice Presidents, Assistant Vice Presidents, Executive Directors, Directors, Associate Provosts, or Deans) to complete a final quality check of Assessment Plans and Reports before they are submitted to OIARP. Office Reviewers will be notified via email when Assessment Plans and Reports are available for review.

Email Notifications

HelioCampus automatically sends an email notification to the Office Reviewer when a Program Coordinator submits their Assessment Plan or Report for review. The sender of these email notifications is listed as "TAMIU AEFIS System," but the emails are sent automatically by the HelioCampus system. **Please carefully read these emails as they include deadlines for plan/report approval.**

Logging in to AEFIS

Go to https://tamiu.aefis.net to log in to HelioCampus, formerly AEFIS. The website will automatically redirect you to authenticate through SSO (Single Sign On) using your NetID and password.

Accessing Assessment Plans or Reports

Assessment Plans or Reports will appear in the Action Items list on the right side of the browser after logging in. Click the blue pencil icon to review the report. If the Action Items list does not automatically appear, it can be accessed by clicking on the bell icon at the top right of the screen.

Once in the plan/report, you will notice that none of the fields are editable except for your checklist section at the bottom of the report.

Approving & Rejecting Assessment Reports

All information in the plan/report is viewable by the Office Reviewer. Read through the plan/report, paying particular attention to each section as you go. If you feel revisions are necessary, provide specific feedback in the appropriate text box and/or at the bottom of the report, click "Reject Form" and then click "I'm Finished, Submit." This action will send the report back to the Program Coordinator. You may also want to notify the Program Coordinator via email that the form was rejected.

Conversely, if the report is in good shape and no revisions are deemed necessary, the report can be approved and submitted. We suggest you still provide feedback because any form of feedback is helpful to coordinators. To approve a report, click "Approve Form" and then click "I'm Finished, Submit."

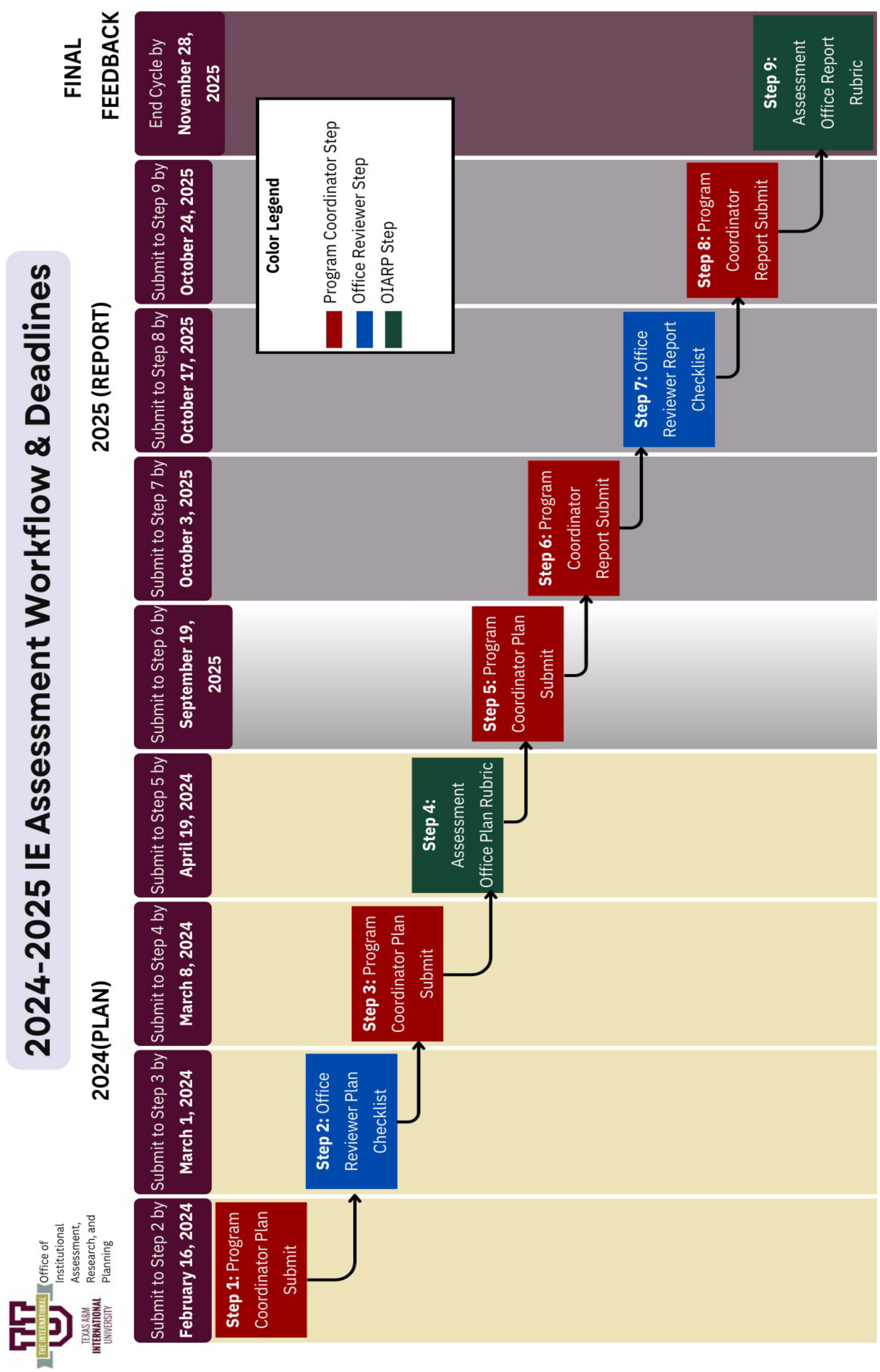
OIARP Comments

The last feedback given during each stage of the assessment cycle is provided by staff in the Office of Institutional Assessment, Research, and Planning (OIARP). In the planning and reporting stages, OIARP will 1) provide feedback on whether there is sufficient description provided 2) rate overall assessment plan and report, and 3) provide qualitative feedback if necessary.

When rating the division's/unit's overall assessment plan and report (as documented in HelioCampus), OIARP staff uses the Assessment Plan Rubric and the Assessment Report Rubric.

The levels of performance for both rubrics are Exemplary (3), Sufficient (2), Developing (1), Needs Attention (0). OIARP works with each IE division/unit to ensure that they achieve sufficient or exemplary in each assessment report element.

Appendix: AY2024-25 Support Unit Assessment Workflow



Appendix: AY2025-26 IEAssessment Workflow