Administrative Effectiveness Evaluation (AEE)

Instructions for Logging into & Navigating Anthology Planning Software

WILLIAM & MARY
CHARTERED 1693

8/15/2023

SACSCOC Principles Standard 7.3:

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

GENERAL LOGISTICS

General Instructions

1

o Go to
https://wm.campuslabs.com/planning/dashboard

o Enter your W&M User ID & Password.

WILLIAM & MARY
CHARTERED 1693

W&M Central Authentication Service

WMuserid:
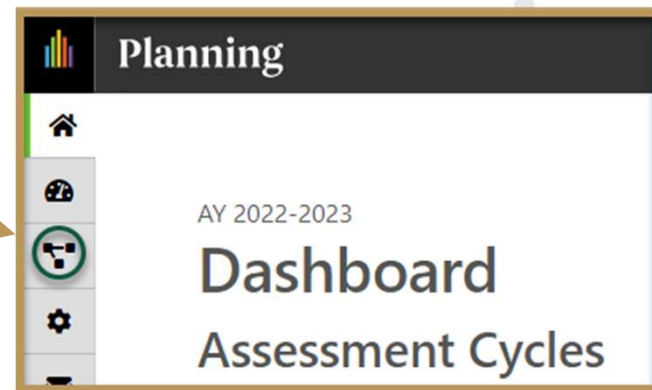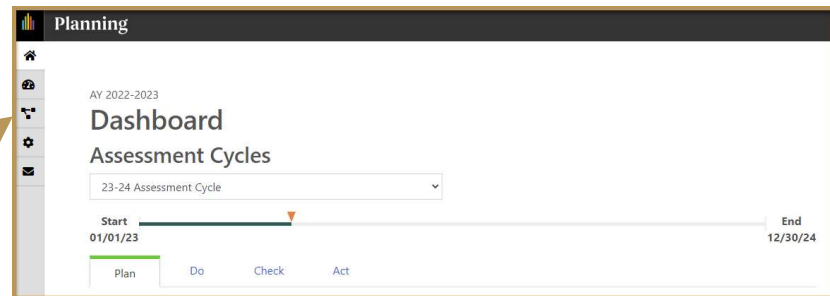
Password:

☐ I am at a public workstation.

LOGIN

General Instructions

2

o Your **Dashboard** displays here.

o Select the **Plans** icon to access your Administrative Effectiveness Evaluation(s) (AEE).
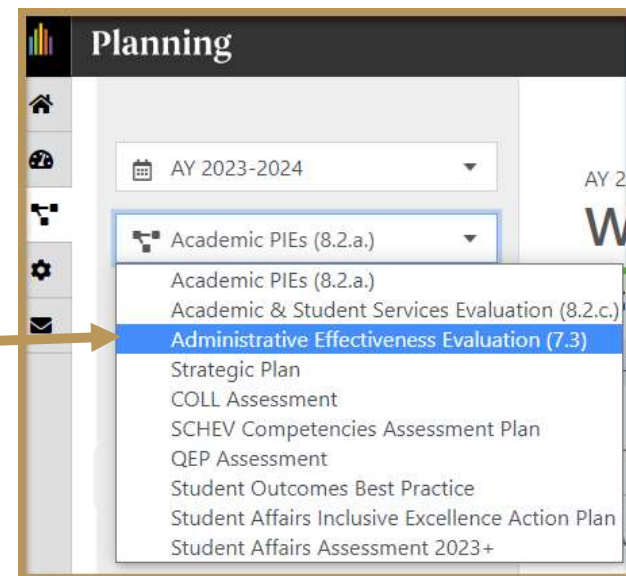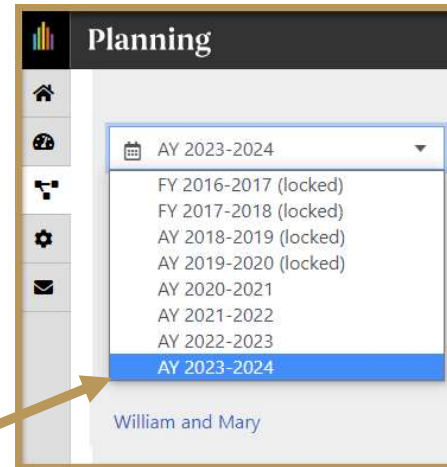
General Instructions

3

o Ensure you are working in the current **Academic Year**.
Planning is set to default to the current year.

o Select **Administrative Effectiveness Evaluation (7.3)** inside the dropdown list.
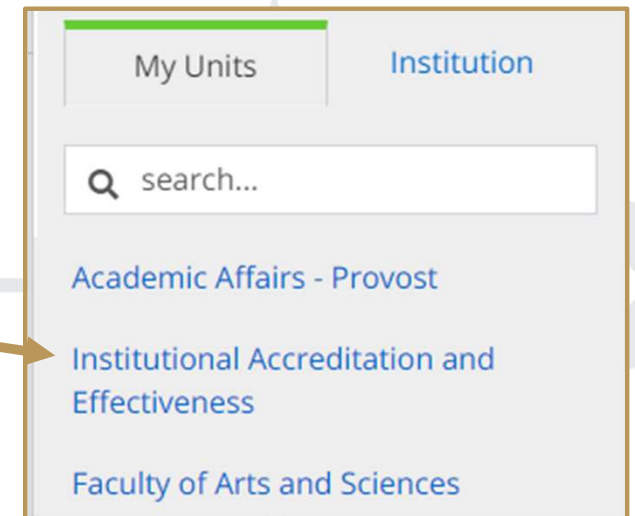It may be the only item on your list.

General Instructions

4

My Units | Institution

Q search...

William and Mary

---

o Select the **My Units** Tab in the left-hand navigation menu.

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

o

My Units | Institution

Q search...

Academic Affairs - Provost

Institutional Accreditation and Effectiveness

Faculty of Arts and Sciences

General Instructions

5

o Your Administrative Effectiveness Evaluation **Plan Items** display here.

o Click the item name to access and complete your unit's **Purpose/ Mission Statement** and two **AEE Expectations**.
Expectation 1 – Efficient & Effective Operations and Expectation 2 – Quality of Service/Stakeholder Satisfaction.

AY 2023-2024 / ADMINISTRATIVE EFFECTIVENESS EVALUATION (7.3)

Institutional Accreditation and Effectiveness

Plan Items · Reports · Documents

FILTER · Sort Default · + Plan Item

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

1 - Efficient & Effective Operations: The unit establishes and maintains efficient and effective operations, optimizing processes and resources (budgetary, human, technological, physical) to achieve targets.
Institutional Accreditation and Effectiveness
Administrative Effectiveness Evaluation Plan & Results · 7/1/23 - 6/30/24

2 - Quality of Service/Stakeholder Satisfaction: The unit ensures high-quality service delivery and meets stakeholder expectations to achieve targets.
Institutional Accreditation and Effectiveness
Administrative Effectiveness Evaluation Plan & Results · 7/1/23 - 6/30/24
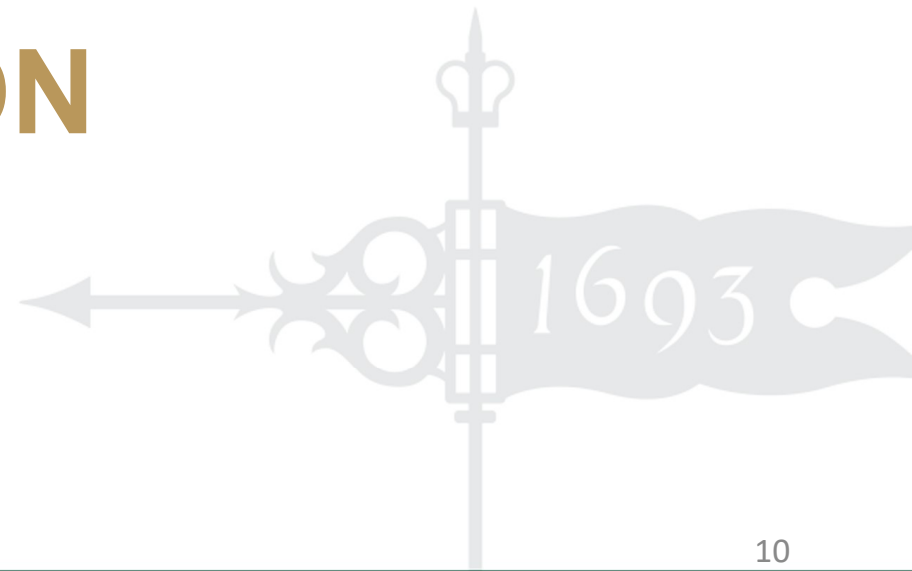
General Logistics

6

o Click on your name in the top right corner to **Sign Out of Planning** and the **Anthology** platform.

o Close your browser to fully complete the sign out process.
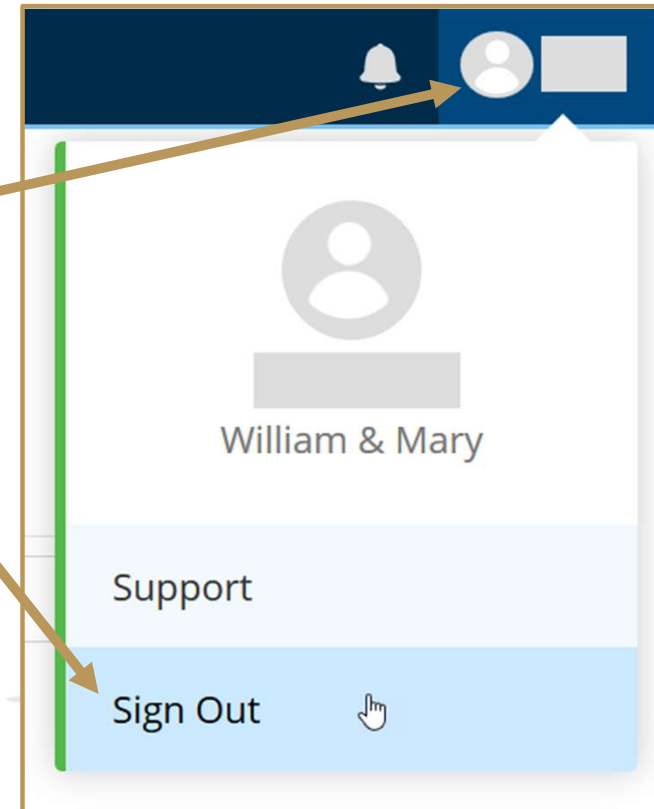
PURPOSE/MISSION STATEMENT

7 Complete Your Unit's Purpose/ Mission

o From the **Plan Items** page, select your unit's **Purpose/Mission Statement** to view and edit.

o The **title** and **general instructions are displayed** at the top of each field. Additional specific instructions/ prompts, as applicable, appear inside text boxes.

o Clicking anywhere outside of text boxes will **save** your edits.
You will see a green circle with a checkmark to the right of the box.

AY 2023-2024 / ADMINISTRATIVE EFFECTIVENESS EVALUATION (7.3)

Institutional Accreditation and Effectiveness

- Plan Items   Reports   Documents

FILTER   Sort Default   ▼   + Plan Item ▼

Institutional Accreditation & Effectiveness Purpose/Mission

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

Unit Name Purpose/Mission *

Institutional Accreditation & Effectiveness Purpose/Mission

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

File Edit View Insert Format Tools Table

↩ ↪   Paragraph   ∨   B *I*   ≡ ≡ ≡ ≡   ...

P

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

File Edit View Insert Format Tools Table

↩ ↪   Paragraph   ∨   B *I*   ≡ ≡ ≡ ≡   ...

P
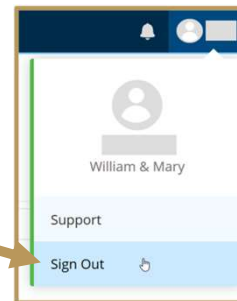
Auto Saved: Jan 9, 2019, 1:07:23 PM

8 Complete Your Unit's Purpose/ Mission

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

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

EXPECTATION EVALUATION PLAN

9

Complete Expectation Evaluation Plan

o Your unit will evaluate **Efficient & Effective Operations** (Exp. 1) and **Quality of Service/ Stakeholder Satisfaction** (Exp. 2).

o **Expectation Description:** Explain what it is you would like to gain from this evaluation. Please follow the prompts.

o **Participants:** Who will be included in this evaluation?

Expectation Name *

1 - Efficient & Effective Operations: The unit establishes and maintains efficient and effective operations, optimizing processes and resourc

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

File Edit View Insert Format Tools Table

Paragraph | B I | ≡ ≡ ≡ ≡ | ⤶ ⤷ | ≔ ∨ ≔ ∨

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

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

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

Expectation Evaluation Plan

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

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

File Edit View Insert Format Tools Table

Paragraph | B I | ≡ ≡ ≡ ≡ | ⤶ ⤷ | ≔ ∨ ≔ ∨

P

10 Complete Expectation Evaluation Plan

o **Data Sources, Collection, & Review Process:** Tell us about the information you plan to collect, how it will be collected, and when. Please follow the prompts.

o **Expectation Achievement Target:** What is the desired outcome or goal of the evaluation? The wording used will allow you to determine if your **target** was "*Met*", "*Partially Met*", or "*Not Met.*"

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

File   Edit   View   Insert   Format   Tools   Table

Paragraph   **B**   *I*

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

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

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

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

File   Edit   View   Insert   Format   Tools   Table

Paragraph   **B**   *I*

11

Complete Expectation Evaluation Plan

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

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

Approximate Start Date of the Evaluation *

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

07/01/2023

Approximate End Date of the Evaluation *

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

06/30/2024

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

File   Edit   View   Insert   Format   Tools   Table

Paragraph   B   I   ≡ ≡ ≡ ≡   ⇤ ⇥   ☰ ˅ ☰ ˅

p

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

File   Edit   View   Insert   Format   Tools   Table

Paragraph   B   I   ≡ ≡ ≡ ≡   ⇤ ⇥   ☰ ˅ ☰ ˅

p

12 Complete Expectation Evaluation Plan

o **Evaluation Plan Review Status:** Select "**Ready for Review**" in the dropdown box. If you are still editing, select "**Not Ready for Review**." *Due 10/27/2023.*

Evaluation Plan Review Status

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

Not Ready for Review ▼

Not Ready for Review
Ready for Review
Resubmitted for Final Review
Review Complete (For IAE/SA Admin Use)
[Blank]

o **IAE/REVIEWER(S)** will indicate approval ("Review Complete" in blue above) or that action is needed after review. **IAE/REVIEWER(S)** will also provide feedback on the evaluation plan here.

Evaluation Plan Review Comments

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

File Edit View Insert Format Tools Table

↶ ↷   Paragraph   ∨   **B** *I*   ≡ ≡ ≡ ≡   ⊡ ⊡   ☰ ∨ ☰ ∨

p

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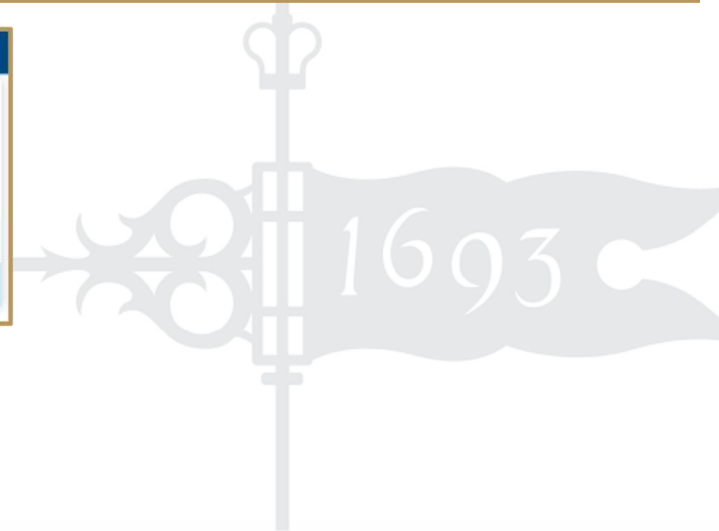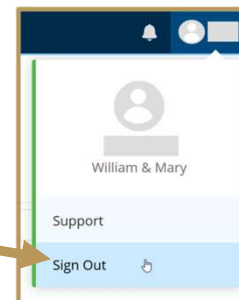
13 Complete Expectation Evaluation Plan

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

- o **Complete** the next **Expectation's Evaluation Plan** or **Sign Out** of Planning and **close** your browser.
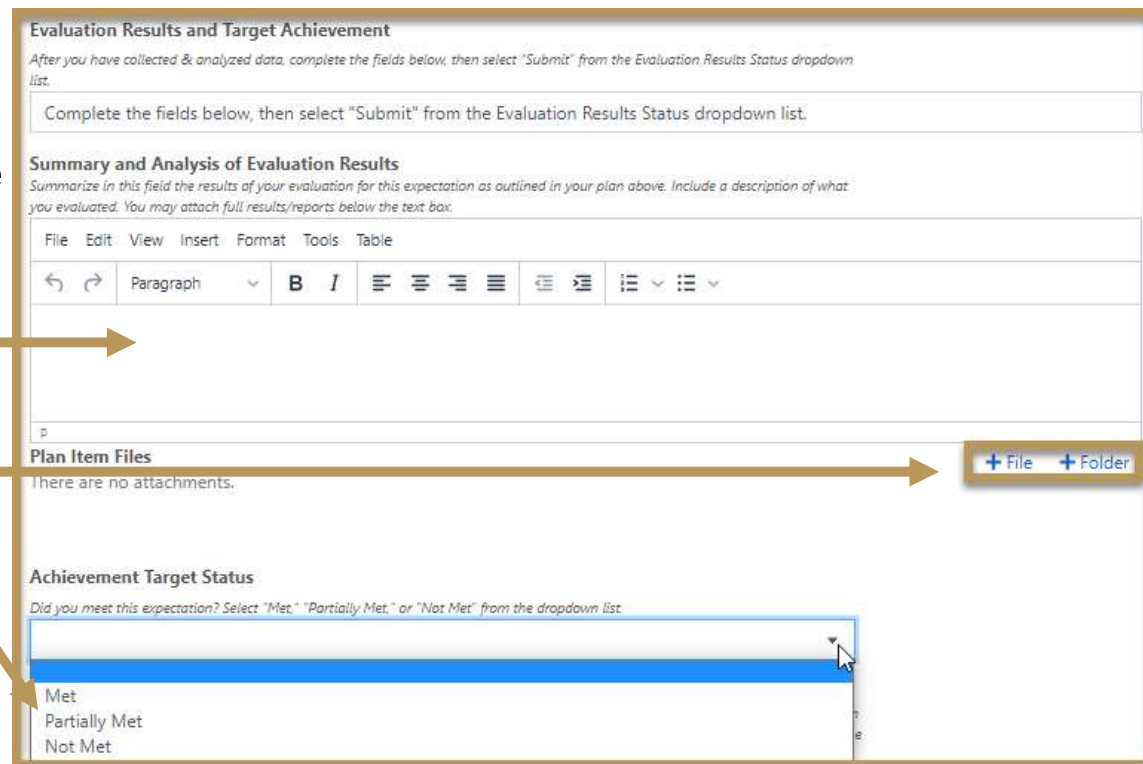
EVALUATION RESULTS & TARGET ACHIEVEMENT

14 **Complete Evaluation Results & Target Achievement**

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

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

o **Achievement Target Status:** Set target status dropdown to either *"Met", "Partially Met", or "Not Met."*

Evaluation Results and Target Achievement

After you have collected & analyzed data, complete the fields below, then select "Submit" from the Evaluation Results Status dropdown list.

Complete the fields below, then select "Submit" from the Evaluation Results Status dropdown list.

Summary and Analysis of Evaluation Results

Summarize in this field the results of your evaluation for this expectation as outlined in your plan above. Include a description of what you evaluated. You may attach full results/reports below the text box.

File Edit View Insert Format Tools Table

↶ ↷   Paragraph   ∨   **B** *I*   ≡ ≡ ≡ ≡   ⇥ ⇤   ☰ ∨ ☰ ∨

p

Plan Item Files   **+ File   + Folder**
There are no attachments.

Achievement Target Status

Did you meet this expectation? Select "Met," "Partially Met," or "Not Met" from the dropdown list.

	▾

Met
Partially Met
Not Met

15 Complete Evaluation Results & Target Achievement

o **Action Plan *if Achievement Target is Partially or Not Met*:** Describe **actions** to make improvements or changes based on your analysis of results.

o **Evaluation Results Status:** Select "*Submit*" when done. *Due 6/30/2024.*

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

o **Complete** the next **Evaluation Results** or **Sign Out** of Planning and **close** your browser.

Action Plan *if Achievement Target is Partially or Not Met*
(IF THE ACHIEVEMENT TARGET STATUS IS PARTIALLY OR NOT MET) Describe actions – improvements, updates, and changes – you plan to implement to meet this expectation's achievement target. If you have already started to implement actions, state what you have done and what remains to be done.

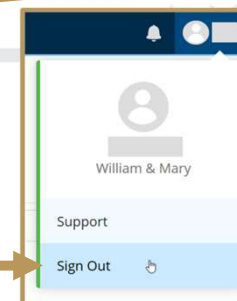File   Edit   View   Insert   Format   Tools   Table

Paragraph   **B** *I*

p

Evaluation Results Status
Please select "Submit" from the dropdown list when you have completed the fields above.

Submit
ASC/IAE Reviewed

Done

William & Mary

Support

Sign Out

Questions?

Contact Us

Denise (drridl@wm.edu, 1-2608)

Roger (rmbryan@wm.edu, 1-6225)

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