Planning & Outcomes Assessment Management Solutions

Performance Requirements Analysis Guide

This checklist is designed to help you determine if the planning & outcomes assessment management solution you are evaluating is capable of providing a breadth of support for continuous improvement, assessment, program review, accreditation and strategic planning.

The Improvement Platform enables institutions and individuals in higher education to plan more consistently, collaborate more effectively, make smarter decisions, and ultimately, create a culture of data-informed, goal-aligned performance. The Platform leverages investments you have already made in BI, predictive analytics, state data marts, public databases, learning management systems and student information systems and brings it all together in one place integrated directly with metrics and strategies in an actionable plan. It unites relevant data and planning processes leveraging Azure, Power BI and Office 365 campus and system-wide.

Improvement Platform Capabilities	Product 1	Product 2
Platform includes a well integrated set of core capabilities including a leading continuous improvement "engine", the ability to align and manage across improvement processes involving any number of goal sets, and the ability to leverage reporting/BI across multiple sources to enhance effective action		
Platform can scale to support any sized institution, system of institutions or ministry level improvement initiatives		
Platform leverages productivity and collaboration tools within a user interface familiar to hundreds of millions to enhance ease of use and lower training costs		
Platform has modern architecture that supports leveraging emerging cloud services in the Business Intelligence (BI), collaboration and productivity areas to support institutional improvement		
Role based views for leadership that include metrics on progress against each plan and an ability to follow selected metrics and to drill down into areas of interest		
Platform allows you to relate any data/reporting from any source to any plan		

All relevant BI/reporting can be tied to planning/outcomes based on role and at the point of greatest impact. This includes metrics, KPI's, predictive analytics and machine learning		
BI/reporting available on campus can readily be connected to planning/outcomes as part of the Platform deployment		
New BI/reporting sources an be readily added as they become available		
Ability to add new BI/reporting sources into a reusable "library" to be used against planning		
Platform offers visual information to manage the planning process itself including detailed metrics on progress at each step and in each area		
Vendor has partnered with Ellucian to work together on access to the Ellucian Ethos Platform to provide improved access to information to Ellucian systems within the platform		
Vendor has partnered with Ellucian to effectively tie Ellucian on premises BI to the platform		
Vendor has partnered with Ellucian to effectively tie Ellucian cloud based analytics to the platform		
Vendor has the ability to augment existing BI with world class BI consulting that is grounded in deep higher education experience		
Goal-aligned action supported across the organization and across multiple goal sets		
Platform documents institutional memory (plans, results, actions, data/information, etc.) which is available for future decision makers		
Platform supports organizational learning including the sharing of best practices and lessons learned at every level and across the institution		
Platform has fully integrated suite of performance tools tied to driving achievement across the institution		
Platform allows you to see the impact you and your program/department are having on "moving the needle" for both your program/department and the overall institution		
Platform grows with your planning and data maturity model allowing you to easily incorporate new information sources while maintaining a history of thinking and action related to "old" information sources		
Platform based on enterprise level architecture		

Improvement Platform Capabilities - Users	Product 1	Product 2
Ability to review all the activities executed against your institution's plans at a glance		
Planning process drives continuous progress toward measurable goals		
Platform distributed so the right people see the right information at the point of maximum impact in the decision making cycle		
Platform supports a culture of data-informed decision making		
Ability to assign plan components to individuals and collect their feedback in an automated way		
Collaboration supported at every step of data informed improvement		
Platform manages entire improvement cycle		
Collects resource requirements during the planning cycle (e.g. budgetary requests)		
Platform provides capability to align your programs toward student success by providing faculty information on their students' key performance indicators and documents their actions to make improvements over time		
Platform allows alignment of program review processes with broader organizational plans and goals		
Platform allows you to use mandated reporting activities (e.g. accreditation, program review) as tools to drive continuous improvement and student success		
Platform allows for easy student data collection, aggregation and disaggregation of results		

Assessment and Planning Solution is a leading application that supports academic outcomes assessment, program review, strategic planning and administrative outcomes all from the same solution. Solution can be purchased as a standalone application or as part of an Improvement Platform (see above) depending on your institution's needs.

Assessment and Planning Solution Functionality - Institution or System Level	Product 1	Product 2
There is a clear path to enhance the solution to a comprehensive continuous improvement platform if your institutional needs require this at some point in the future		
Deployments at multi-campus university and community college systems		
Developed for institution-wide outcomes assessment, strategic planning, program review, and accreditation		
Application is designed for use in academic and non-academic areas of the institution		
Application supports institutional nomenclature for assessment		
Application configurable at the level of the program and above supporting unique needs of specific units		
Custom fields can be defined and added to many screens/forms		
Application supports an unlimited number of reporting and assessment units		
Application supports an unlimited number of users (e.g. faculty and staff)		
Role-based access (roles defined by institution)		
Branding elements (e.g. logo) may be added to most standard reports and may appear on the login screen		
Data can be brought into application from multiple sources (e.g. LMS, e-portfolio) and in multiple formats (e.g. Zip file, Excel, Word)		
Summary page show status of assessment for all of the institution's programs/departments		

Assessment and Planning Solution Functionality - Institution or System Level, continued	Product 1	Product 2
Application supports task assignment to any user or designated non-user via email. If running application in Office 365, users and non-users can see/access/complete assignments in a task assignment app		
Includes a web-based data collection tool that is form based		
File manager with folder access by program and role		
Supports recurring assessments, demonstrating longitudinal progress and continuous improvement		

Functionality - Reporting Unit Level (School, College, Division)	Product 1	Product 2
Roll up results from related assessment units (programs/depts.), make summary observations and take action at reporting unit level		
Configurable for each reporting unit (e.g. Business, Education, Student Affairs, General Education, Strategic Planning)		
Link reporting unit goals to higher level goals (e.g. institutional, accreditation, etc.)		
Define unique nomenclature and custom fields for reporting units		
View and manage outstanding tasks (if using Task Assignment)		
Reporting unit summary pages show status of assessment for each program/department in the reporting unit		

Functionality - Assessment Unit Level (Department, Program, Committee)	Product 1	Product 2
Define labeling for groups of assessment units (e.g. academic, non-academic, program review, planning, etc.)		
Define custom fields for individual assessment unit(s)		
Summary pages show status of assessment plan, student learning outcomes for each course		
Course level outcomes assessment		
Link course level outcomes to assessment unit (e.g. program) outcomes as well as to goals at unit, institution, and/or system levels		
Unlimited number and type of assessment methods for each outcome		
Task Assignment allows users and designated non-users to submit data, comment and propose action via emailed link. If application deployed in Microsoft O365, users and non-users can see/access/complete assignments in a task assignment app.		
Resource requests tied to actions for improvement		

Configurability & Reporting	Product 1	Product 2
Standard configurable reports available		
Ability to add your institution's logo to the top of most standard reports		
Program and role-based access to reports		
Standard reports available in PDF, HTML, and Microsoft Word		
Ad hoc reports available in PDF, HTML, Microsoft Word and Excel		
Curriculum mapping in PDF, HTML, Microsoft Word and Excel		
Many reports include links to supporting data		

Advanced Technology	Product 1	Product 2
Application offered hosted (Azure cloud) or on premises		
Application does not require a dedicated server (if on premises)		
Application can run in Office 365 / SharePoint Online or On Premise		
Application aligned with Microsoft productivity solutions		
Users access application through common web browsers: Internet Explorer, Firefox, Safari, Chrome		
Unlimited application data storage (hosted)		
Institution controls when software updates are applied		
Supports multiple authentication standards such as LDAP, Active Directory, Shibboleth and CAS		

Services and Support	Product 1	Product 2
Implementation services are delivered remotely (option for on-site)		
Designated Professional Services staff member for on-going configuration, customization and training (managed services option)		
A situational analysis is used to inform application configuration		
Additional fee-based services available as needed		
Support/Help videos and tutorials within the application		
Telephone and email support available as part of annual maintenance contract/subscription		

Vendor Resources	Product 1	Product 2
Experience in planning and outcomes assessment for over 16 years		
Significant partnerships (e.g. Microsoft, Ellucian)		
An active user group and annual user conferences facilitate collaboration and provide networking opportunities		
Designated Customer Success team member assigned to institution		
Case studies and references available		
Newsletter and product update mailings		