Effective Practice: Using the Portal as an Institutional Portfolio

Submitting Institution:
The College of New Jersey

Date Submitted:
8/11/2004

Subject Terms:
Accreditation, Strategic Planning, Institutional

Background/Challenge:
The College of New Jersey sought to leverage technology to integrate our campus-wide planning process with our accreditation process. Traditionally, the accreditation process has required that institutions pause while documenting the processes leading up to the present. Rooms full of filing cabinets and binders with data and papers documenting decisions, plans, results, and the process itself were gathered to prove to an accrediting body that sound decisions were being made based on a cycle of inquiry.

Practice/Solution:
The college is in sync with a new approach to accreditation advocated by Middle States Association of Colleges and Schools, our accrediting body. This approach allows for an accreditation process that works hand in hand with the institutional planning process. The key question is not what you did, but what you are doing, as well as how and why.

To facilitate this approach, we have leveraged the "workgroup" functionality in the PeopleSoft Portal (any portal that allows users to create directories can be used to simulate this approach) to group the documents of our various planning divisions into our cycle of inquiry—vision, data collection, programs, and probing questions.

In addition, we have added the ability for departments to assign metadata to each document that shows which elements that planning document supports. These elements are taken directly from the Middle States accreditation review process.

Combining these tools with a query tool that allows people to search by division, standard/element, and annual cycle and an inventory page that includes links to the documents that support the accreditation elements gives the accreditors easy access to our documents.

Benefits:
The most significant benefit of this tool is the ability to leverage the diverse approaches to planning to create one repository that supports accreditation. Individual units can continue to plan autonomously and submit the resulting documents to the planning portal. Representatives from institutional research, academic affairs, and IT review the documents to make sure they are appropriately described and tagged.

The portfolio also offers planning executives the ability to easily share high-level documents, showcase their efforts, and learn from each other's best practices while reducing the likelihood that an important document is maintained on one individual's desktop.

An electronic portfolio acts as a central repository—one location for key documents. We want to avoid the scenario in the popular TV commercial where a guy is knocked out right after he says, "All the information is right up here." The electronic portfolio approach helps limit the liability of concentrating knowledge in one person and minimizes the effects of attrition. It also allows the institution to leverage existing backup strategies and security safeguards while allowing Web access to documents anytime, anywhere.

Shortcomings:
The planning process on campus is diverse and changing, which limits the effectiveness of a planning tool. Different areas have different ways of organizing and discussing their planning processes, making it difficult to build an application that doesn't limit flexibility yet remains useful.

The biggest challenge is getting people to use it. Adding the metadata for the accreditation process is an extra step that has no immediate benefits for planning units, especially when it's not an accreditation year.

**Future Plans:**

Once the accreditation process is complete, we plan to work toward a campus standard planning process that includes annual submission and review of documents in the portal.

**References - File(s):**

- Planning Portfolio Presentation
- Power Point Presentation

**Costs:**

- portal consultant (360 hours + travel)
- 1 full time application developer (4 weeks)
- 1 full time Web developer (4 weeks)
- 1 full time project manager (3 weeks)
- 1 part time DBA (1 week)

**Replicable:**

How replicable is this practice or solution?

- Not at all
- Highly

**Effectiveness:**

How effective is this practice or solution?

- Not at all
- Highly

**Contact:**

This person has agreed to be contacted for more information on this effective practice.

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