

Transformative Assessment Planning Template
Outline for a Culture of Evidence Developmental Document – A Plan to Plan

Assessment Plan Outline Element	Process	Team Action Plan
I. Institutional Inventory		
a. Statement of relevant institutional mission/vision	Draw on an analysis of institutional planning documents and what you know about the institutional culture to articulate a vision	
b. List of planning documents that are necessary to implement the vision (e.g., Strategic plan, IT Strategic Plan)	Identify and Collect the documents.	
c. Report on alignment of planning documents (between each other and the mission/vision).	One way to do this is to go through the Align Planning branch of the READY system.	
d. Communication and collaboration plan.	Identify the groups or organizations that would be involved in activities that would lead to the specific outcome/goals envisioned by this mission/vision.	
e. Describe the processes you are going to use to formulate and refine the goals and outcomes in operational terms.	One technique is to use the Triad Exercise (see resources under “Links,” in http://team.educause.edu/tap)	
f. Conceptual Framework	<ul style="list-style-type: none"> • Develop common set of desired developmental and learning outcomes. • Identify teaching and learning activities/experiences and programs that will lead to those outcomes. • Define role of technology in supporting the teaching and learning activities/experiences and programs. 	

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e. Planning matrix	<ul style="list-style-type: none"> • List the key questions to study in relation to the conceptual framework elements • Identify key indicators used to answer the questions (baseline, short-term, intermediate and long-term) • Identify stakeholders and intended audience for indicators • Identify how audience will use indicators to make decisions 	
II. Institutional Assessment Program	Identify and prioritize series of assessment projects (iterative process)	
a. Institutional Capacity	Identify resources available to conduct assessment (Go through the Transformative Assessment branch of READY system)	
i. Individuals/Offices	Offices that might be involved include: Institutional Research; Assessment/ Evaluation; Department/ College of Education; Center for Teaching Excellence; Instructional Technology; Library; etc.	
ii. Previous studies	Such as: accreditation self-studies; institutional research studies; studies by the center for teaching excellence.	
iii. Existing task forces/committees (their reports and activities)	Examples include: Faculty senate committees on teaching and excellence; A TLT Roundtable or similar group; an accreditation self-study committee.	
b. Prioritized list of projects	Prioritize and choose few critical questions (based on review of institutional capacity, and institutional priorities)	
c. Institutional development plan	Authenticate the institutional vision and mission relating to teaching and learning	

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	Plan an ongoing way to involve stakeholders, operating in their communities of practice, in implementing and refining the conceptual framework and assessment program	
III. Assessment project plan(s)		
a. Project timeline	Lay out project timeline based on planning matrix	
b. Project team description	Based on review of stakeholders, identify project team make-up, team members and team roles	
c. Key indicators	Prioritize and choose a few critical indicators that this project will address	
d. Scenarios	Identify range of potential assessment results and their implications	
e. Evaluation plan for the assessment project	Design evaluation plan that looks at the results, whether the results were acted upon	
f. Conceptual framework recommendations	Modify conceptual framework based on what you've learned	