System for Assessment Management: Contributor’s Manual
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Introduction

Our Mission

The mission of the Institutional Effectiveness, and Planning unit in USF’s system Office of Decision Support is to promulgate good assessment and data analysis practices across all programs at the university and to align these activities with other continuous quality improvement initiatives to include the strategic plan, program review, annual reporting, institutional research, and all requirements of the Board of Governors (BOG) and external accrediting agencies. However, the primary purpose of the unit remains the continuous improvement of teaching and learning by providing faculty and staff with methodologically sound information regarding student learning and program planning in areas targeted by the curriculum so that programmatic adjustments may be made most effectively.

Assessment

Assessment is an ongoing effort at USF and is linked to the broader enterprise of continuous quality improvement. External forces have shaped the direction of assessment over the past decade including the requirements of the Southern Association of Colleges and Schools Commission on Colleges (SACSCOC) and new requirements by the Board of Governors (BOG). Assessment is facilitated by the Institutional Effectiveness and Planning unit.

System for Assessment Management (SAM)

SAM is an online assessment system used to enter and edit all assessment plans for academic programs (undergraduate, graduate, certificate), academic and student support services, and Centers and Institutes to meet SACSCOC and Florida BOG requirements.

Using this Guide

This guide will explain and show how to access, navigate, and input information into SAM.
Accessing SAM

Getting into SAM
In order to get into SAM, follow the instructions below.

1. Open your web browser
2. Go to usf.edu/ods
3. Click “About ODS” tab at the top of the screen

4. In the drop down menu, click “Institutional Effectiveness and Planning (IEP)”
5. Click “Assessment”
6. Click “SAM Reporting”
7. Click “Log In”
   - Note: If you never accessed SAM before, you may not have access. In order to request access to SAM click the “Request Access” link. Please see the following section on how to use the Request Access page.
Requesting Access

On the Request Access page you will need to input the following information:

NetID, First Name, Last Name, Email, Type (see below for the explanation), Campus, College/Div.

Assessments are organized by assessment and period types. There are four assessment types:

- Academic
  - All the academic programs (excluding certificates) fall under this category.
- Certificates
- Institute and Centers
- Academic and Student Support Services

There are also three time period types (Please see the “Assessment Due Dates and Timeline” section to learn where your program(s) falls):

- Academic Year
- Calendar Year
- Fiscal Year

Once all the required information is selected, you will see a list of assessments appear in the section titled “Available Assessments”. Please select the assessments to which you need access, then click “Add”. Use Ctrl-Click or Shift-Click to select multiple assessments. Enter any unlisted assessments you need access to in the “Other Assessments” area.

By default everyone is given a “Contributor” role; however you may request another role if needed. There are three roles in SAM that a faculty or staff member may request:

- Contributor
  - This role is given to the faculty or staff member who is responsible for editing and submitting assessments; the person in this role receives updates, emails, and notification regarding the assessment.
- Supervisor
  - This role is for someone who supervises the assessment, but is not directly involved with monitoring every single assessment plan/report (i.e. a Dean or a Chair); the person in this role may edit or submit the assessment information, but they will not receive updates, emails, and notification regarding the assessment.
- Viewer
  - This role gives permission only to view the assessment, without the ability to edit or submit them; the person in this role does not receive updates, emails, and notification regarding the assessment.
Navigating SAM

Homepage and Assessment List
When you have successfully logged into SAM, you will see the homepage with announcements about important information regarding upcoming due dates, changes to the assessment requirements, and other important information.

In order to see assessment plans/reports to which you have access, click “Assessments” on the tab above and select assessment type together with the period type; you will see a list of assessments.

Status Columns
The first six columns are self-explanatory (Campus, College, Major, Degree, Level, CIP Code); however, please take a look at the last four.

1. **Status Column** shows the last action conducted on assessment.
   a. **Not Started** – no assessment has been added to the system for the current cycle.
   b. **Edited** – the assessment was edited but not yet submitted.
   c. **Submitted** – the assessment has been submitted and awaits IE review.
d. **Reviewed** – the assessment has been reviewed. You may go in and make adjustments if needed.
e. **Reopened** – the assessment was viewed by the department but there have been no edits made.

2. **Review Status Column** shows status of the review.
   a. **(Plan) Report Not Reviewed** – the assessment was not reviewed; either it was not submitted, or we have not yet been able to review it.
   b. **(Plan) Report Not Approved** – the assessment is not in compliance with SACSCOC and/or FL BOG, therefore adjustments to the assessments are needed.
   c. **(Plan) Report Approved** – the assessment meets minimum SACSCOC and FL BOG standards.
   d. **In Review** – Institutional Effectiveness is in the process of reviewing the assessment. You cannot make edits if the plan/report is marked “In Review”.

3. **Last Review** shows the degree of compliance and granted exceptions.
   a. **Compliant** – the assessment meets minimum SACSCOC and FL BOG standards.
   b. **Non-Compliant 1** – minor edits are needed to bring the assessment into compliance.
   c. **Non-Compliant 2** – major issues with the assessment (e.g. missing elements).
   d. **On Hold** – the assessment was granted an extension or an exception.

4. **Actions**
   a. **View Assessments** (Paper Symbol)
   b. **Edit Assessment** (Pencil Symbol)

**Assessment Cycles**
At the top-right corner you will see the cycle selection. There are two concurrent cycles that you can work with in SAM at any given moment:

1. **Planning Phase**
   During this phase you are submitting a plan for an upcoming year. Required assessment sections are:
   a. Student Learning Outcome Statement
   b. Method of Assessment
   c. Performance Target

2. **Reporting Phase**
   During this phase you are submitting a report for the year that has passed. Required assessment sections are:
   a. Assessment Results
   b. Use of assessment Results

*Important Caveat. Whenever you are submitting an assessment, make sure you are submitting it into the correct cycle.*
**Academic Learning Compacts**

BOG Regulation 8.016 requires each SUS institution to develop a process that ensures that program faculty:

- Develop and publish an Academic Learning Compact (ALC) for each baccalaureate program. At a minimum, the ALC must contain a list of core student learning outcomes (SLOs) in the areas of content/discipline knowledge and skills, communication skills, and critical thinking skills – and examples of assessment students might encounter.

SAM automatically extract SLOs, curriculum map, and common assessment methods and publishes it on the public-facing web page; you can access and see the ALCs from the “Assessments” menu.
Working with the Assessment Plan/Report

Assessment Structure
Each assessment plan/report consists of a number of different components.

1. Mission Statement
2. Curriculum Map (Not required for graduate program)
3. Goals
4. Student Learning Outcomes
5. Common Assessment Methods

Editing Goal/Outcomes
In order to edit a goal or an outcome, click an edit button that is directly to the right of the object you wish to edit. Please note, if “Assessed this cycle” is unchecked, all the sections beside the Student Learning Outcomes Statements will be hidden (e.g. Methods of Assessment, Performance Targets, Assessment Results, and Use of Assessment Results). In other words, contributors are not able to edit the sections, and Institutional Effectiveness is not able to review them; therefore, if you intend to assess an outcome, make sure that “Assessed this cycle” is checked.

“Assessed this Cycle” checkbox
Rationale. This feature was introduced into SAM to help academic programs conform to SACSCOC and FL BOG requirements stating that every program “…identifies, evaluates, and publishes goals and outcomes for student achievement…”. The checkbox feature allows the programs to list all of their SLOs, but only assess a few of them per period. The idea is for external evaluators to be able to see all of the SLOs of any given program, and not only those assessed in a given period.

Example. Take a look at the following example. The following program listed three different outcomes under the “Communication Skills” goal, therefore demonstrating the outcomes students will achieve as a result of the program. However, the program decided to assess only the second outcome this period, therefore they checked “Assessed this cycle” for that outcome.
Goal Type

One of the features is the ability to select “goal type” when creating a new goal or editing an existing one. When you are creating or editing a goal, there is a drop down menu that allows users to select one of the four “goal types”:

1. Discipline-Specific Knowledge and Skills;
2. Communication Skills;
3. Critical Thinking Skills;
4. Other (Non-ALC).

Please note that all undergraduate programs are required to have at least one outcome for the goal types one, two, and three. It is possible to have additional goals that do not fit the ALC framework; in this case select “Other (Non-ALC)” goal type and input a goal statement. Some examples of possible Non-ALC goal types are laboratory skills, information literacy, ethical reasoning, civic engagement, and so on.

Note that graduate programs are not required to use any of the three ALC goal types; instead, they may select “Other (Non-ALC)” goal type and state goals that represent their specific program.

As stated previously, you may select goal type whenever you edit an existing goal or add a new one.

For the existing goal, click “Edit” next to the goal statement. If you do not see an “Edit” button, scroll to the bottom of the screen and click “Reopen for Editing”/“Unsubmit Assessment”.

You will be able to select the goal type from the drop down menu, and input the goal statement in the field below.
If you are adding a **new goal**, click “Add Goal” and you will be able to select a new goal type and input a new goal statement.

Please note that in this case the “Communication Skills” goal type no longer appears on the list. Each assessment plan may only have one of each ALC goal types; however, you may have any number of “Other (non-ALC)” goal types.

The example below is a good way to organize outcomes:

- **Goal Type:** “Communication Skills.”
- **Goal Statement:** “Students getting an undergraduate degree in Mechanical Engineering will be able to communicate effectively and on the level that is necessary for a successful employment within the discipline”.
  - Outcome 1: “Students will demonstrate written communication skills by writing a thesis that presents defensible conclusions, is based on verifiable evidence, demonstrates students’ ability to convey essential discipline-specific knowledge, and employs rules of the Standard Written English”.
  - Outcome 2: “Students will demonstrate oral communication skills by giving a presentation using various verbal and non-verbal techniques of effective delivery”.
  - Outcome 3: “Students will be able to communicate effectively as a team, including the ability to plan and organize workflow, manage conflicts, and efficiently share information with each other”.
Uploading Curriculum Map
The section to upload a curriculum map is at the top of the assessment plan page. To upload your curriculum map, click on the edit button at the top right of the curriculum box. Two more buttons will appear.

- Choose File: select a file ending in .bmp, .gif, .png, .jpeg, .doc, .xls, .xlsx, .pdf
- Upload File: Upload selected file to SAM. Once uploaded, the document will become a link that when clicked will download the uploaded file.

Important Note: Please make sure that Student Learning Outcomes (SLOs) listed in the map and those stated in the assessment plan should be perfectly aligned; in other words, (1) there should be an equal number of SLOs, (2) SLOs wording should be identical both in the curriculum map and in assessment plan.

Submitting Assessment
In order to submit an assessment for our review, please scroll to the bottom of the assessment page and click “Review Submission”. Clicking it will take you to a separate checklist page where all the sections are grouped together by section type. This page asks the contributor to certify that their assessment plan/report adheres to the compliance standards. If you are satisfied with your assessment, you may check “Learning outcomes are ready for review” and click “Submit”, provided that you can attest that the criteria have been met.

Important Caveat. Whenever you make changes to the individual sections within the assessment plan/report, assessment remains in the “Edited” status. In order for Institutional Effectiveness to be able to review the assessment, you need to finalize your changes by submitting the report.

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