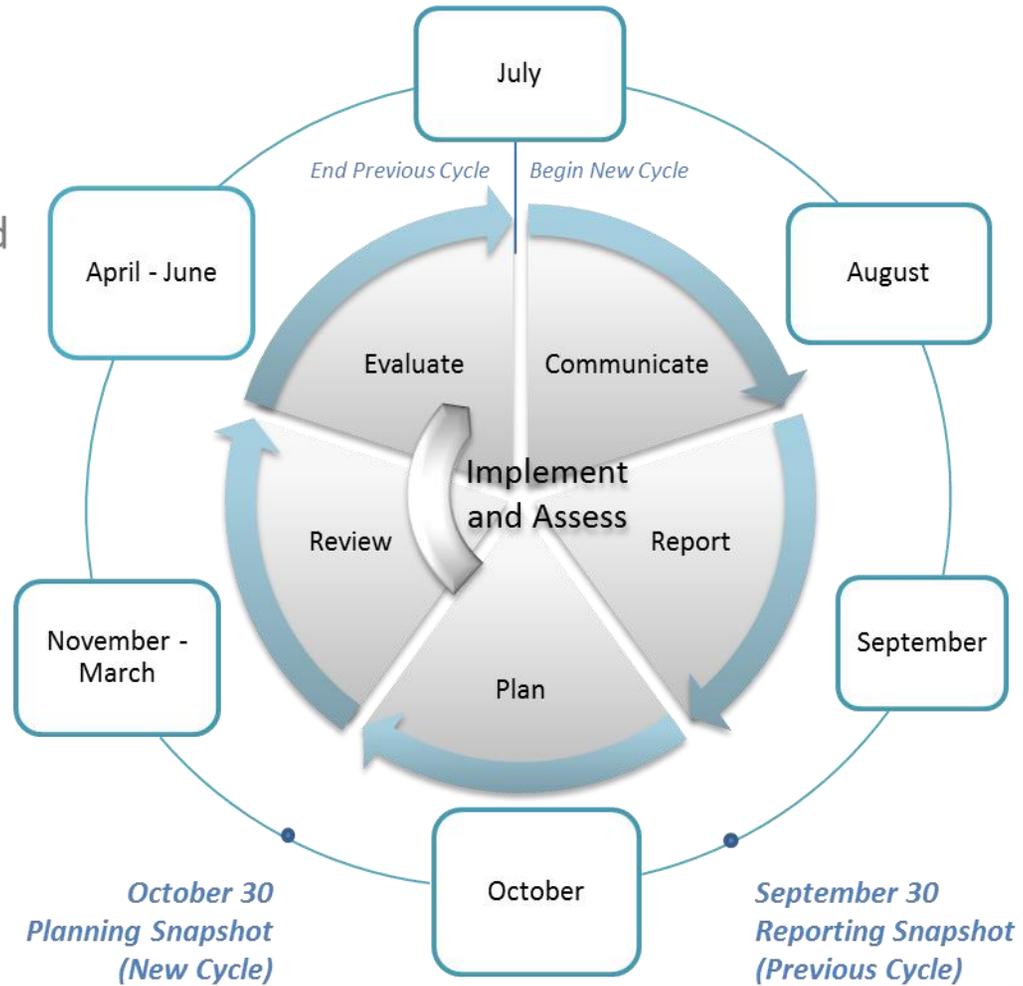




Annual Planning and Evaluation Cycle



Improve

Planning, Evaluation and Reporting Time Line

To engage all units in an integrated process where results can be used drive improvement, the IE office suggests the following time table for planning, assessment and evaluation activities. Terminology is defined in the “Legend” and in the “Definitions” sections below.

Legend			
Level 1	Board of Trustees		
Level 2	President	Level 4	Deans, Senior Deans
Level 3	Vice Presidents (EVP, VPs, AVPs)	Level 5	Department Heads, Managers, Faculty, Staff

**Indicates required completion date. All other dates are suggested target dates.*

Responsibility	Target Completion Date	Phase	Task
Levels 2 and 3	August 30	Communicate	Levels 2 and 3 supervisors review and communicate to employees their IE/Applied Benchmarking findings and action plans for previous cycle and goals, intended outcomes and measures for new cycle.
Levels 4 and 5	August 30	Communicate	Levels 4 and 5 supervisors and employees review (with each other) and communicate IE and Applied Benchmarking findings from the previous cycle and action plans for the new cycle.
Level 1	September 30	Communicate	Board of Trustees reviews, modifies and approves Level 2’s recommendations for the college’s planning and evaluation process and its Mission, Vision, Goals and Strategic Plan.
All Levels	September 30*	Report	All Levels finalize IE Reports for previous cycle in WEAVE: enter findings and action plans. Also enter analyses and summaries, detailing how assessment results are being used to improve units.
All Levels	September 30*, 5PM	Report	IE office takes “snapshot” of IE reports for previous cycle in <i>WEAVEonline</i> .

Levels 2 through 4	October 30*	Plan	All levels complete IE plans for current cycle in WEAVE, including outcomes, measures and targets. Levels 2 through 4 review and approve employee's IE plans for current cycle in <i>WEAVEonline</i>
IE Office	October 30* 5PM	Plan	IE office takes "snapshot" of new IE plans in <i>WEAVEonline</i> .
All Levels	October 30	Implement and Assess	All levels have begun implementing and assessing current IE Plans and Applied Benchmarking Projects
IE Office	February 1	Review	IE Office submits unit IE Report reviews for previous cycle to Levels 3 and 4.
Levels 4 and 5	March PD	Review	Professional Development Day presentations: Levels 4 and 5 share how the results of IE planning and assessment and Applied Benchmarking are being used to improve outcomes in units.
IE Office	May 30	Review	IE Office submits final <i>Annual Planning and Evaluation Report</i> for previous cycle to Levels 2 and 3 for review.
Level 2	May 30	Review	Level 2 reviews <i>Annual Planning and Evaluation Report</i> for previous cycle with each Level 3 employee.
All Levels	June 30	Evaluate	All units finish implementing and assessing (collecting and analyzing data and evidence) their plans from the previous cycle, finish their Applied Benchmarking projects, and will begin evaluating their IE data and evidence.
Levels 2 and 3	July 30	Evaluate	Levels 2 and 3 meet to evaluate progress toward Wake Tech college goals (based on outcomes reported in <i>Annual Planning and Evaluation Report</i> for previous cycle) and recommend improvements and modifications to Level 2.
Levels 2 and 3	July 30	Evaluate	Levels 2 and 3 evaluate the college's planning and evaluation process and make recommendations to Level 2.
Levels 2, 3 and 4	July 30	Evaluate	Levels 2, 3 and 4 evaluate budget needs connected to college goals and strategic plans for next cycle. Document how planning and evaluation relates to the budget process.

Definitions

AB (Applied Benchmarking): a process of 1) identifying a problem that needs improvement within a unit; 2) identifying a solution developed by an outside expert; 3) planning to adopt and improve the solution to fit the needs of the unit; 4) implementing the plan; 5) assessing whether or not the plan resulted in intended outcomes; 6) evaluating assessment results by comparing actual to intended outcomes and 7) developing action plans for future improvement. Applied benchmarking plans can be implemented by individuals or groups as deemed appropriate by supervisors. As authorized by supervisors, Applied Benchmarking may begin as the project of one individual and become a group implementation plan. **With supervisor approval, AB projects can become IE plans and reports if the AB project is designed to improve the intended outcomes within a whole unit.**

Action Plans: specific actions and interventions that will be implemented based on the results of Applied Benchmarking and IE planning and evaluation.

Assessment: Assess (v.): to examine carefully. Assessment is the systematic collection and analysis of information for the purpose of improvement (modified from George Kuh, National Institute of Learning Outcomes Assessment).

Entity: Synonym for “unit” used in *WEAVEonline*.

Evaluation: Evaluate (v.): to compare actual to intended outcomes and judge the significance of findings; to review and judge evidence for the purpose of making recommendations for further actions.

Goals: operationalize unit’s purpose; are broad, long range, and not immediately measureable and attainable; attainment is measured by more specific, measureable and shorter range “snapshots” of intended outcomes connected with the goal.

IE (Institutional Effectiveness) Plan: A coordinated set of intended outcomes for achieving goals.

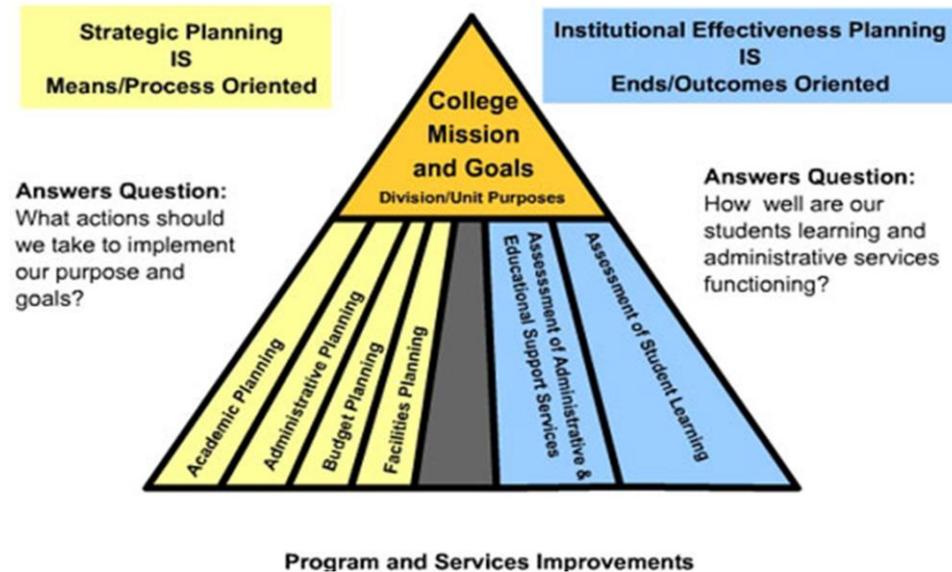
IE Planning and Evaluation: See definition for *Applied Benchmarking*. IE Planning and Evaluation within individual units *is* Applied Benchmarking if a solution from an outside expert has been used in the design of the plan. Applied Benchmarking projects can become part of a unit’s IE plan in *WEAVEonline* if the project is designed to improve a problem in the unit.

Intended Outcomes: clearly defined and measurable statements of intention that describe a point to be reached. Answers the question: “Are we achieving our goals?” For example, intended student learning outcomes identify knowledge, skills, and abilities students should gain or improve through engagement in an academic program or other learning experience.

Measure: method to gauge achievement of intended outcomes (examples include tests, surveys, inspection of documents).

Snapshot: an impression or view of something that is constantly moving or changing. A “snapshot” of an IE report shows the contents of an entity in *WEAVEonline* on the date and at the time a report was extracted.

Strategic Plan*: A tool that provides guidance in fulfilling the college’s Mission and Goals with maximum efficiency and impact. While IE plans focus on measuring and evaluating the extent to which college goals have been achieved (outcomes), strategic plans and goals focus on the actions the college needs to take and resources it needs to achieve those goals in its operating environment.



**Adapted from:*

- 1) The Department Head's Guide to Assessment Implementation in Administrative and Educational Support Units, by James O. Nichols and Karen W. Nichols, Agathon Press, New York 2000;
- 2) Ten Keys to Successful Strategic Planning for Nonprofit and Foundation Leaders

<https://www.ideaencore.com/item/ten-keys-successful-strategic-planning-nonprofit-and-foundation-leaders>

Target: Specific statements of desired level or timing of attainment of intended outcomes. Example: “95% of administrators and staff will finalize their IE reports in *WEAVEonline* by September 30”.

Unit: A department, division, service area or other group entity responsible for IE/AB planning and evaluation.

Wake Tech’s Strategic Goals (Revised 8/2013)

Student Success: Wake Tech will provide students with a dynamic learning environment through policies, curricula, instruction and support services that are responsive to their needs and focused on improving completion rates in programs that prepare them for employment or transfer to a four-year institution.

Workforce Development: Wake Tech will promote economic growth, job creation and entrepreneurship through educational partnerships that provide citizens with the skills necessary for success in a transformational economy. Partnerships will include business, industry and the public school system.

Diverse Learning Needs: Wake Tech will provide citizens with opportunities to develop and upgrade essential skills for lifelong learning and the workplace through flexible, accessible, and customized educational and training programs.

Resources: Wake Tech will continuously research, analyze, and secure the resources necessary to fulfill the mission of the College.

Community Services: Wake Tech will provide courses and support services for personal enrichment and lifelong learning centered around the community’s civic, economic and cultural needs.