**Assessments**

**Assessments Overview**

At the end of each semester, we enter a ~2 month period where we are preparing for and completing assessments. (December-January in the winter, and May-June in the summer.) This is a unique time where we get to hit the "reset" button, debriefing the previous semester with each student, identifying their strengths and areas where they need support, and collaboratively building a plan for the coming semester.  
  
The goals of an assessment are to:

* Encourage reflection on successes and challenges in the previous semester and identify areas for continued growth
* Receive feedback from students about Bottom Line's support
* Determine the student's milestone achievement to-date
* Collect relevant data to inform the service plan and priority milestones for the next semester
* Ensure the student is aware of any next steps needed to enroll in the coming semester (if applicable)​​​​​​​

On this page you'll find details and materials related to:

* [Reflective Conversations](https://tbl500amory.sharepoint.com/sites/SuccessProgramCurriculum/SitePages/Assessments.aspx#reflective-conversations)
* [Data Collection](https://tbl500amory.sharepoint.com/sites/SuccessProgramCurriculum/SitePages/Assessments.aspx#data-collection)
* ​​​​​​​[Assessing Graduates](https://tbl500amory.sharepoint.com/sites/SuccessProgramCurriculum/SitePages/Assessments.aspx#assessing-graduates)
* [Additional Resources](https://tbl500amory.sharepoint.com/sites/SuccessProgramCurriculum/SitePages/Assessments.aspx#additional-resources)
* [Assessment Notes](https://tbl500amory.sharepoint.com/sites/SuccessProgramCurriculum/SitePages/Assessments.aspx#assessment-notes)
* [Assessment Goals](https://tbl500amory.sharepoint.com/sites/SuccessProgramCurriculum/SitePages/Assessments.aspx#assessment-goals)​​​​​​​

**For Team Managers**

Review the "Managing Assessments" page to learn more about your role in supporting advisors in the assessments process.

[**Managing Assessments**](https://tbl500amory.sharepoint.com/sites/SuccessProgramCurriculum/SitePages/Managing-Assessments.aspx)

**Reflective Conversations**

[**Conversation Guide**](https://tbl500amory.sharepoint.com/sites/SuccessProgramCurriculum/SitePages/Reflective-Conversations.aspx)

Reflective conversations are vital to understanding our students' experiences and facilitating a collaborative goal-setting process. We believe that, at minimum, a voice-to-voice connection is vital to making these conversations meaningful. For this reason, reflective conversations should only be logged as such if they occur over the phone/video call. ​​​​​​​

While we encourage staff to have these conversations with as many students as possible on their caseload, they should be prioritized for students who:

* are in their 1st Year
* are transferring or taking time off from school
* had a poor semester academically for the first time
* had a strong semester academically after a period of weaker performance
* are at a critical decision point with regards to major, anticipated grad date, etc.
* have significant bill issues
* have an emerging life need impacting their college experience or ability to persist​​​​​​​
* **​​​​​​​**Are graduating this year and have not yet begun the job search process

**Data Collection**

We utilize a number of tools to gather the data needed to assess students, including:

* Sending a personalized Form Assembly survey to collect self-reported data and transcripts from students**(read more about this in the**[**Data Collection Guide**](https://tbl500amory.sharepoint.com/sites/SuccessProgramCurriculum/SitePages/Assessment-Data-Collection-Guide.aspx)**) OR**gaining access to students' academic data directly via their student portals
* Existing knowledge of the student based on the relationship that was developed over the previous semester
* The reflective conversation

​​​​​​​Not all students will participate in a reflective conversation or complete the survey; we ask that advisors continue to follow up with students to collect as much critical data as possible and work to fill in the blanks from student accounts, when we can get access.​​​​​​​

[**Data Collection Guide**](https://tbl500amory.sharepoint.com/sites/SuccessProgramCurriculum/SitePages/Assessment-Data-Collection-Guide.aspx)

**PRO TIP**: Download the checklist(s) below if you'd like to be able to check off the boxes from your computer, without having to print anything out.

[**Assessment Checklist by DEAL**](https://tbl500amory.sharepoint.com/:w:/s/BottomLine/Ee6Eu3SPweBOmWOw-FlRHEABhGKqFcF5_hIxoYQCqGNvZg?e=3aher2)

[**Assessment Checklist by Database Location**](https://tbl500amory.sharepoint.com/:w:/s/BottomLine/EcJ-SeKJMNBLg8fHtF8VHdEBZiMKOVsoXSqTdYG8Vd0q_g?e=UmD6Ae)

**Assessing Graduates**

Our process differs slightly for students who are graduating/have graduated this semester.

Who is a graduate? Any student who:

* Earns the minimum **number of credits** required by their college
* Fulfills the requirements for their **Bachelors Degree**(based on their declared major(s)/minor(s))
* **Owes $0** to the college​​​​​​​

Some colleges will allow students to walk at graduation if they have met some but not all of these requirements; Bottom Line will only consider a student graduated once they have fulfilled all 3 requirements and officially earned their degree.

[**Assessment Checklist for Grads**](https://tbl500amory.sharepoint.com/:w:/s/BottomLine/Ecya1iuumeZMn5gcr5ESuIkB_DURgwQUgt4HRAb7Rhah0g?e=1uQ8Vl)

**Additional Resources**



[**Service Planning Road Maps**](https://tbl500amory.sharepoint.com/sites/SuccessProgramCurriculum/SitePages/Service-Plan-Road-Maps.aspx)

The Service Planning Road Maps provide recommended areas of focus for students based on their progress toward graduation.

[**On Track Dashboard**](https://app.powerbi.com/groups/me/apps/43578119-a96e-44b0-9099-faad9f3b9f50/reports/4fa566d5-71da-4493-9251-eb106f2514ae/ReportSectionf3abf6debef79e8bebac)

The On Track Dashboard (full tutorial below) shows each student in the program and their projected graduation timeline based on their credit accumulation thus far. Check this **after credit data is entered and** **before reflective conversations** to confirm the student's projected timeline and proactively plan to make up credits, as needed. Getting funky caseload numbers here? Make sure you're filtering for just Active students.

[**Employability Milestones Self-Assessment**](https://tbl500amory.sharepoint.com/:w:/s/SuccessProgramCurriculum/EQUUqkA8q_VOh4Ynv8qa8hwByNm8IV7J_Zcxr5NSvlkX1g?e=U3QrFq)

The E Milestones self-assessment is a tool to use with students as a conversation starter for what E services/supports they would like to prioritize next semester. Includes example e-mail prompts you can send to students in advance if you want them to reflect on these before the conversation.

[**Data Quality Dashboard**](https://app.powerbi.com/groups/me/apps/43578119-a96e-44b0-9099-faad9f3b9f50/reports/c31f59ce-1a9a-46f8-afd0-f426d30eb07b/ReportSection8feb699603b0a20b7576)

Broken up into 3 sections (start of year, winter assessments, and end of year), the Data Quality dashboard will help you ensure that you captured all of the critical data for each student and highlight any areas that might be inconsistencies in the data. Read more [here](https://tbl500amory.sharepoint.com/sites/ReportingDocumentation/SitePages/Data-Quality.aspx).

[**Inactive Student Process**](https://tbl500amory.sharepoint.com/sites/SuccessProgramCurriculum/SitePages/Inactive-Student-Process.aspx)

At the end of each assessment period, advisors and their managers will review students on their caseload who have been unenrolled in college for 3 semesters with no plan to return. Additionally, during Summer assessments, we review students who have been consistently disengaged from the program for the entire academic year.

**Assessment Notes**

Click the “Create Note” button and choose “Assessment” as the category.  Notes should only include information that is not otherwise in the database (e.g. not GPA) or that requires further explanation. Please be concise and follow Bottom Line's guidelines for [Program Notes](https://tbl500amory.sharepoint.com/sites/SuccessProgramCurriculum/SitePages/Program-Notes.aspx).

**General Note**: in the Summer Assessment, please make note of how to **pronounce the student's name**. It's very possible your student may have a different advisor next year, and we want that information to show at the top of the page for the new advisor.

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| **Degree**  *Add a brief reflection of student’s academic progress from prior semester.  What did you and student work on in this area?  Address any of these points if relevant:*   * If the student didn’t do well, why? What’s the plan to improve? * If the student did well, what's working for them? What new strategies did they try? * Does the student’s progression toward their degree match up with their anticipated graduation timeline? If not, how will they get back on track? * What are the changes that the student wants to make academically?   *Sample Degree Note:   Jami is maintaining her strong academic performance. She is 3 credits behind where she needs to be in order to graduate next year – we will need to do Credit Recovery first thing next semester to discuss her options.  I am waiting to hear whether she will commit to a minor in English.* |
| **Employability**  *Add a brief reflection of student’s Employability progress from prior semester.  What did you and student work on in this area?  What should be the focus going forward? Address any of these points if relevant:*   * Areas of employability the student wants to focus on * How you identified the priority milestones for next semester   *Sample Employability Note: Jami and I focused on networking and confidence as they relate to her building relevant experience before she graduates. She is applying for internships in publishing and curatorial work. She has grown in professional confidence but it is my priority for her to have relevant experience before she graduates, as well as for us to make a plan B if she doesn’t secure a job in those 2 fields.* |

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| **Affordability**  *If student has no outstanding issues associated with financial aid, write “N/A.”  Otherwise, address these questions:*   * Is the student at risk for not receiving all financial aid next year? If so, what’s the plan? * If the student has an overdue balance, what’s the plan for paying it off? * If the student has financial aid application issues, what are they and what’s the plan to fix them?   *Sample Aid Note:  Jami was selected for citizenship verification and is waiting to hear that her documentation has been processed. Otherwise, no issues. We have talked a lot about budgeting and financial management this year.* |
| **Life**  *What’s going on for the student outside of D,E,A? Remember, for a documented Life Event that includes sensitive information, please create a separate note and choose "Life" as the category. If applicable, address these questions:*   * What additional support/resources are needed? * If the student has been difficult to reach during the semester, describe outreach strategies that have been the most successful.   *Sample Life Note:  Jami wants to start a book review blog – an exciting personal goal when she has the time. Construction is done at her house and which has relieved a lot of her stress trying to do schoolwork in a chaotic environment this semester.* |

**Assessment Goals**

* We expect advisors to have a **data-driven, student-centered service plan built for** **at least 80% of students**each semester
  + For Winter 2023, this goal will be measured on 2/15/23 using the status of the "Spring Service Plan Ready for Review" task
  + For Spring 2023, this goal will be measured on 7/15/23 using the status of the "Summer Service Plan Ready for Review" task
    - *You can view all of your open "Spring/Summer Service Plan Ready for Review" tasks on the*[*Tasks Tab*](https://tbl500amory.sharepoint.com/sites/SuccessProgramCurriculum/SitePages/Tasks.aspx#tasks-tab)*, see student-by-student progress on the Advisor Caseload Dashboard, and track your overall progress on the Success Program Goals dashboard*
* Gathering critical data and engaging in reflective conversations directly supports advisors' goal of **completing data-driven, student-centered service plans for the students on their caseloads**
* The **critical data** collected during assessments also informs the following performance goals for advisors:
  + Enrolled students are on track to graduate within 5 years
    - *This data point can be tracked on the On Track Dashboard*
  + 65% of students complete at least 3 new Employability milestones each year
    - *This data point can be tracked on the E-Milestones Tracker, Advisor Dashboard and Success Program Goals dashboard*

Managers will review the data and service plans for at least the first 15 assessments for each advisor, and will continue to spot check at least 5 service plans per advisor per week for the remainder of assessment period.