**Managing Assessments**

**Managing Assessments Overview**

Team Managers play an active role in the assessments process by helping advisors craft a work plan, monitoring the quality of assessments and service plans completed, and changing students' stages when certain criteria are met.

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

* [Work Plans](https://tbl500amory.sharepoint.com/sites/SuccessProgramCurriculum/SitePages/Managing-Assessments.aspx#work-plans)
* [Reviewing Assessments & Service Plans](https://tbl500amory.sharepoint.com/sites/SuccessProgramCurriculum/SitePages/Managing-Assessments.aspx#reviewing-assessments-service-plans)
* [Measuring Progress toward Goals](https://tbl500amory.sharepoint.com/sites/SuccessProgramCurriculum/SitePages/Managing-Assessments.aspx#measuring-progress-toward-goals)
* [Managing Inactive Students](https://tbl500amory.sharepoint.com/sites/SuccessProgramCurriculum/SitePages/Managing-Assessments.aspx#managing-inactive-students)
* [Managing Graduates](https://tbl500amory.sharepoint.com/sites/SuccessProgramCurriculum/SitePages/Managing-Assessments.aspx#managing-graduates)

**Work Plans**

[**Work Plan Handout**](https://tbl500amory.sharepoint.com/:w:/s/BottomLine/Eb6KDnce5ZZDjuSlx_WE98kBbTesJ91GIPC9xyjNb57Y7g?e=ayu5IV)

Assessments can feel like an overwhelming prospect to advisors, especially new advisors who don't know what to expect. During the assessments training, advisors are encouraged to think through and design a work plan for themselves that a) takes into account their working style, strengths & development areas, and b) accounts for any other priorities they will be juggling during assessment period.

As you are coaching staff around their assessments work plans, here are some **best practices** to keep in mind:

* Know when your team's schools generally have their grades available; this will impact when advisors are able to have conversations with the majority of their students
* Do not plan any reflective conversations the last two weeks of assessments; this should be a buffer week to clean up data, enter remaining service plans, and follow up with stragglers, if there are any
* We strongly recommend that advisors complete the data in real-time as they are completing conversations; meeting with a ton of students and then trying to go back and catch up on the data generally proves to be inefficient (because who can remember what we did yesterday, let alone a conversation we had last week?) and cause more stress at the end of assessments period. Real-time entry also allows you to give more meaningful feedback in real-time.

**Reviewing Assessments & Service Plans**

[**Assessment Review Checklist**](https://tbl500amory.sharepoint.com/:b:/s/BottomLine/EdnccniDuhlPuR9vJAZn6N4B-KAJ0XG7QqAIQM_797QKog?e=nY29qj)

Managers' quality control of assessments goes beyond verifying that all the boxes are checked. Use the Assessment Review Checklist to make sure advisors are taking a step back from the individual data checkpoints to think holistically about each student - Are they on track? Any red flags? Where should the focus areas be for the coming semester? Does the service plan reflect these priorities?

There is a list view specific to managers named "Service Plans for Review." Students will be added to this list as advisors check off the "Spring Service Plan Ready for Review" task. This list is located in the "Tasks" menu at the top of your screen (see screenshots, left and below).

Click a student's name to read the note and review the profile to answer the questions listed above. Locate the **"Assessment Approval Status" field on the critical data for FALL**to indicate whether you feel the assessment is approved or needs improvement. When you mark an assessment as "Needs Improvement," the service plan task status will change to "In Progress" and the student will show on the advisor's "In Progress Service Plans" list view.

When reviewing service plans, keep an eye out for trends: does the advisor often prioritize general Degree tools over more specific supports? Are advisors moving students along appropriately in their Employability Milestones? Are there services to account for any "red flag" areas in the assessment?

Managers are expected to review at least the first 15 assessments for each advisor each semester, and then spot check at least 5 per advisor per week for the remainder of assessment period. You are not expected to enter an assessment approval status for every student, but this field will help you to track how many service plans you have reviewed for each advisor and to follow up on next steps for any that needed improvement.

**Measuring Progress toward Goals**

Manage advisors' progress in completing reflective conversations and service plans using the [Tasks Tab](https://tbl500amory.sharepoint.com/sites/SuccessProgramCurriculum/SitePages/Tasks.aspx#tasks-tab). You can also track overall progress toward the performance goal of **80% service plans** **complete by 2/15/23**using the [Success Program Goals](https://app.powerbi.com/groups/me/apps/43578119-a96e-44b0-9099-faad9f3b9f50/reports/f5f92230-67ac-4766-aff1-7a80c3bdf746/ReportSectiondcb294505054c94ad48a) dashboard in PowerBI.

* ​​​​​​​The tasks for this semester are called "Winter Reflective Conversation" and "Spring Service Plan Ready for Review"
* Generally, we expect to see the reflective conversations being completed slightly more quickly than service plans, but as mentioned above, we caution advisors not to move too far forward on conversations without completing the accompanying service planning tasks.
* 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*

The [**Data Quality Dashboard**](https://app.powerbi.com/groups/me/apps/43578119-a96e-44b0-9099-faad9f3b9f50/reports/c31f59ce-1a9a-46f8-afd0-f426d30eb07b/ReportSection8feb699603b0a20b7576) can be used to spot check that all fields have been filled in based on the time of the year and to check for inconsistencies in the data. See this quick video tutorial on how to use the dashboard to manage your Assessment review (the tutorial is for winter assessments, but the intent is the same for summer!).

**Managing Inactive Students**

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

There is a list view specific to managers named "Inactive Candidates." This list is located in the "Program Records" menu at the top of your screen. The first time you access this list you'll need to click the Program Records tab and then click the down arrow to find the inactive candidates list.

Students will show on this list if the advisor has indicated a reason they think the student should become inactive, and managers will review this list and make changes to students' stages **after the assessment period is over**.

Review the Inactive Student Process, paying close attention to the [After Assessments](https://tbl500amory.sharepoint.com/sites/SuccessProgramCurriculum/SitePages/Inactive-Student-Process.aspx#after-assessments) section.

**Managing Graduates**

The last list view for managers is called "Potential Grads." This list is located in the "Program Records" menu at the top of your screen. The first time you access this list you'll need to click the Program Records tab and then click the down arrow to find the potential grads list.

Students will show on this list if the advisor has chosen an [Anticipated Graduation](https://tbl500amory.sharepoint.com/sites/SuccessProgramCurriculum/SitePages/Program-Record.aspx#anticipated-graduation) date, and managers will review this list with advisors during assessments to confirm that students have successfully earned their Bachelors Degree.

As a reminder, in order to earn a degree each student must:

* Earn the minimum **number of credits** required by their college
* Fulfill the requirements for their **Bachelors Degree**
* **Owe $0** to the college

In addition, we expect advisors to:

* Fill in the "[Date Earned BA](https://tbl500amory.sharepoint.com/sites/SuccessProgramCurriculum/SitePages/Contact-Info.aspx#date-earned-ba)" (estimates are fine) ​​​​​​​

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**. If you discover that a student has not met the criteria for being considered a graduate, please ask the advisor to delete the [Date Earned BA](https://tbl500amory.sharepoint.com/sites/SuccessProgramCurriculum/SitePages/Contact-Info.aspx#date-earned-ba).

Use the "My Success Team's Potential Grads" list view to edit the stages of all confirmed graduates to "Graduated."