



# Checklist of Expectations and Requirements for Outcomes Assessment Plans

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## PREFACE

This document contains a checklist of expectations and requirements for preparing an outcomes assessment plan that meets the IACBE’s expectations for an effective quality management system. The checklist is designed to be used in conjunction with the required template that the IACBE has created for its members to use in developing their outcomes assessment plans and with the IACBE’s handbook entitled *Guidelines for Preparing an Outcomes Assessment Plan*. These documents are available for download on the IACBE website at: [www.iacbe.org/oa-documents.asp](http://www.iacbe.org/oa-documents.asp).

The IACBE has developed a comprehensive example of a complete outcomes assessment plan that employs its template form and that meets IACBE requirements for assessing quality in the academic business unit’s programs and operations. The example can be used as a model to guide IACBE members in the preparation of their own assessment plan documents. For a copy of the sample outcomes assessment plan, please contact IACBE World Headquarters.

## Checklist of Expectations and Requirements for Outcomes Assessment Plans

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This checklist contains five sections corresponding to the following five key content areas of an outcomes assessment plan as described in the IACBE’s handbook entitled *Guidelines for Preparing an Outcomes Assessment Plan*:

Section I: Mission and Broad-Based Goals

Section II: Student Learning Assessment

Section III: Operational Assessment

Section IV: Linkage of Outcomes Assessment with Strategic Planning and Budgeting

Section V: Appendices

In preparing your outcomes assessment plan, you must use the template form that the IACBE has developed for this purpose. The template is also organized according to the five key content areas identified above.

As you develop your plan, use the following checklist in order to ensure that all of the IACBE’s expectations and requirements have been met. If you do not offer any business programs at a particular degree level (i.e., associate-, bachelor’s-, master’s-, or doctoral-level programs), check the box labeled “Not Applicable” in the relevant section, and leave all of the check boxes in that section blank. For any checkbox that remains unchecked in the relevant sections, you will need to revise your assessment plan accordingly prior to submitting it to the IACBE.

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Section I: Mission and Broad-Based Goals	
<input type="checkbox"/>	The outcomes assessment (O/A) plan contains a statement of the academic business unit’s mission.
<input type="checkbox"/>	The O/A plan contains a listing of broad-based student learning goals for the academic business unit.
<input type="checkbox"/>	The broad-based student learning goals are stated from the students’ perspective and clearly describe what students are expected to learn, know, understand, appreciate, or value as a result of completing their programs of study.
<input type="checkbox"/>	Each broad-based student learning goal is directly related, or can be mapped, to some aspect of the academic business unit’s mission.
<input type="checkbox"/>	Each broad-based student learning goal has at least one intended student learning outcome in the business programs (from Section II: Student Learning Assessment) that is linked to it.

### Section I: Mission and Broad-Based Goals (Cont'd)

<input type="checkbox"/>	The O/A plan contains a listing of broad-based operational goals for the academic business unit.
<input type="checkbox"/>	The broad-based operational goals clearly describe what the academic business unit will do, will provide, or intends to accomplish in terms of its overall organizational and functional performance.
<input type="checkbox"/>	Each broad-based operational goal is directly related, or can be mapped, to some aspect of the academic business unit's mission.
<input type="checkbox"/>	Each broad-based operational goal has at least one intended operational outcome (from Section III: Operational Assessment) that is linked to it.

Proceed to Section II on the following page.

## Section II: Student Learning Assessment

<b>Learning Assessment for Associate-Level Programs</b>		<input type="checkbox"/> Not Applicable
<input type="checkbox"/>	The O/A plan articulates intended student learning outcomes for each associate-level business program for which the academic business unit is seeking accreditation.	
<input type="checkbox"/>	For each intended student learning outcome in each associate-level program, the O/A plan identifies the broad-based student learning goals (from Section I: Mission and Broad-Based Goals) to which that outcome is linked.	
<input type="checkbox"/>	Each intended student learning outcome in each associate-level program is linked to some broad-based student learning goal (from Section I: Mission and Broad-Based Goals).	
<input type="checkbox"/>	For each intended student learning outcome in each associate-level program, the O/A plan identifies the 'Key Learning Outcomes for Associate-Level Business Programs' to which that outcome is linked.	
<input type="checkbox"/>	The intended student learning outcomes for each associate-level program substantially encompass the 'Key Learning Outcomes for Associate-Level Business Programs.'	
<input type="checkbox"/>	The intended student learning outcomes are program-level outcomes, not course-level outcomes (i.e., they clearly describe what students are expected to know and be able to do at the conclusion of each associate-level degree program.)	
<input type="checkbox"/>	The intended student learning outcomes are appropriate to associate-level programs (i.e., they reflect appropriate associate-level knowledge, skills, and competencies).	
<input type="checkbox"/>	The intended student learning outcomes are measurable, are stated using active verbs (e.g., according to Bloom's Taxonomy of Educational Objectives), and clearly describe the knowledge, skills, abilities, competencies, attitudes, and values that students are expected to acquire as a result of completing their associate-level programs of study.	
<input type="checkbox"/>	For each associate-level business program for which the academic business unit is seeking accreditation, the O/A plan identifies both direct and indirect measures of student learning that will be used to assess the program's student learning outcomes.	
<input type="checkbox"/>	None of the direct measures of student learning in each associate-level program are course-level assessments (i.e., they are not exams, assignments, or other tasks in individual courses, modules, or classes except in the case of those instruments used in an end-of-program, capstone course, module, or class).	
<input type="checkbox"/>	For each direct and indirect measure of student learning in each associate-level program, the O/A plan identifies the intended student learning outcomes that are assessed by that measure.	
<input type="checkbox"/>	All direct learning assessment measures in each associate-level program actually assess the intended student learning outcomes that they are designed to (i.e., they contain required student performance components or tasks that students are required to complete that are directly related to the intended learning outcomes).	

## Section II: Student Learning Assessment (Cont'd)

<input type="checkbox"/>	Except in the case of objective-type comprehensive examinations, the direct learning assessment measures in each associate-level program are accompanied by evaluation rubrics that contain performance criteria that are directly and explicitly tied back, related, or mapped to the intended student learning outcomes in the program that the instruments are designed to measure as specified in the student learning assessment tables.
<input type="checkbox"/>	In the case of objective-type comprehensive examinations that are being used as direct learning assessment measures, the exams in each associate-level program contain subsets of questions that are directly and explicitly tied back, related, or mapped to the intended learning outcomes that the exams are designed to measure.
<input type="checkbox"/>	All indirect measures of student learning in each associate-level program contain items, questions, or components that are directly and explicitly tied back, related, or mapped to the intended student learning outcomes that they are designed to measure.
<input type="checkbox"/>	Each intended student learning outcome in each associate-level program is assessed by at least one direct measure and at least one indirect measure of student learning.
<input type="checkbox"/>	For each direct and indirect measure of student learning in each associate-level program, the O/A plan specifies the performance objectives (measurable performance targets/criteria) that will be used by the academic business unit to determine the extent to which the intended student learning outcomes are being achieved.
<input type="checkbox"/>	The performance objectives (measurable performance targets/criteria) for each direct measure of student learning in each associate-level program are expressed in terms of desired performance ratings on learning-outcome-related evaluation criteria in the evaluation rubrics associated with that measure, or in the case of objective-type comprehensive examinations, in terms of desired performance levels on each subset of exam questions associated with each intended learning outcome that it is designed to measure.
<input type="checkbox"/>	No overall grades, percentage scores, or marks on any learning assessment instrument are being used as direct measures of student learning. In addition, the “completion of a task or assignment” is not being used as a direct measure of student learning.
<input type="checkbox"/>	The performance objectives (measurable performance targets/criteria) for each indirect measure of student learning in each associate-level program are expressed in terms of desired results on learning-outcome-related items/questions in the instruments.
<input type="checkbox"/>	The performance objectives (measurable performance targets/criteria) for each indirect measure of student learning in each associate-level program are not expressed in terms of student satisfaction with instructors, teaching, courses, etc.
<b>Learning Assessment for Bachelor’s-Level Programs</b>	
	<input type="checkbox"/> Not Applicable
<input type="checkbox"/>	The O/A plan articulates intended student learning outcomes for each bachelor’s-level business program for which the academic business unit is seeking accreditation.

## Section II: Student Learning Assessment (Cont'd)

<input type="checkbox"/>	For each intended student learning outcome in each bachelor's-level program, the O/A plan identifies the broad-based student learning goals (from Section I: Mission and Broad-Based Goals) to which that outcome is linked.
<input type="checkbox"/>	Each intended student learning outcome in each bachelor's-level program is linked to some broad-based student learning goal (from Section I: Mission and Broad-Based Goals).
<input type="checkbox"/>	For each intended student learning outcome in each bachelor's-level program, the O/A plan identifies the 'Key Learning Outcomes for Bachelor's-Level Business Programs' to which that outcome is linked.
<input type="checkbox"/>	The intended student learning outcomes for each bachelor's-level program substantially encompass the 'Key Learning Outcomes for Bachelor's-Level Business Programs.'
<input type="checkbox"/>	The intended student learning outcomes are program-level outcomes, not course-level outcomes (i.e., they clearly describe what students are expected to know and be able to do at the conclusion of each bachelor's-level degree program.)
<input type="checkbox"/>	The intended student learning outcomes are appropriate to bachelor's-level programs (i.e., they reflect appropriate bachelor's-level knowledge, skills, and competencies).
<input type="checkbox"/>	The intended student learning outcomes are measurable, are stated using active verbs (e.g., according to Bloom's Taxonomy of Educational Objectives), and clearly describe the knowledge, skills, abilities, competencies, attitudes, and values that students are expected to acquire as a result of completing their bachelor's-level programs of study.
<input type="checkbox"/>	For each bachelor's-level business program for which the academic business unit is seeking accreditation, the O/A plan identifies both direct and indirect measures of student learning that will be used to assess the program's student learning outcomes.
<input type="checkbox"/>	None of the direct measures of student learning in each bachelor's-level program are course-level assessments (i.e., they are not exams, assignments, or other tasks in individual courses, modules, or classes except in the case of those instruments used in an end-of-program, capstone course, module, or class).
<input type="checkbox"/>	For each direct and indirect measure of student learning in each bachelor's-level program, the O/A plan identifies the intended student learning outcomes that are assessed by that measure.
<input type="checkbox"/>	All direct learning assessment measures in each bachelor's-level program actually assess the intended student learning outcomes that they are designed to measure as specified in the student learning assessment tables (i.e., they contain required student performance components or tasks that students are required to complete that are directly related to the intended learning outcomes).
<input type="checkbox"/>	Except in the case of objective-type comprehensive examinations, the direct learning assessment measures in each bachelor's-level program are accompanied by evaluation rubrics that contain performance criteria that are directly and explicitly tied back, related, or mapped to the intended student learning outcomes in the program that the instruments are designed to measure.

## Section II: Student Learning Assessment (Cont'd)

<input type="checkbox"/>	In the case of objective-type comprehensive examinations that are being used as direct learning assessment measures, the exams in each bachelor's-level program contain subsets of questions that are directly and explicitly tied back, related, or mapped to the intended learning outcomes that the exams are designed to measure.
<input type="checkbox"/>	All indirect measures of student learning in each bachelor's-level program contain items, questions, or components that are directly and explicitly tied back, related, or mapped to the intended student learning outcomes that they are designed to measure.
<input type="checkbox"/>	Each intended student learning outcome in each bachelor's-level program is assessed by at least one direct measure and at least one indirect measure of student learning.
<input type="checkbox"/>	For each direct and indirect measure of student learning in each bachelor's-level program, the O/A plan specifies the performance objectives (measurable performance targets/criteria) that will be used by the academic business unit to determine the extent to which the intended student learning outcomes are being achieved.
<input type="checkbox"/>	The performance objectives (measurable performance targets/criteria) for each direct measure of student learning in each bachelor's-level program are expressed in terms of desired performance ratings on learning-outcome-related evaluation criteria in the evaluation rubrics associated with that measure, or in the case of objective-type comprehensive examinations, in terms of desired performance levels on each subset of exam questions associated with each intended learning outcome that it is designed to measure.
<input type="checkbox"/>	No overall grades, percentage scores, or marks on any learning assessment instrument are being used as direct measures of student learning. In addition, the "completion of a task or assignment" is not being used as a direct measure of student learning.
<input type="checkbox"/>	The performance objectives (measurable performance targets/criteria) for each indirect measure of student learning in each bachelor's-level program are expressed in terms of desired results on learning-outcome-related items/questions in the instruments.
<input type="checkbox"/>	The performance objectives (measurable performance targets/criteria) for each indirect measure of student learning in each bachelor's-level program are not expressed in terms of student satisfaction with instructors, teaching, courses, etc.
<b>Learning Assessment for Master's-Level Programs</b>	
	<input type="checkbox"/> Not Applicable
<input type="checkbox"/>	The O/A plan articulates intended student learning outcomes for each master's-level business program for which the academic business unit is seeking accreditation.
<input type="checkbox"/>	For each intended student learning outcome in each master's-level program, the O/A plan identifies the broad-based student learning goals (from Section I: Mission and Broad-Based Goals) to which that outcome is linked.
<input type="checkbox"/>	Each intended student learning outcome in each master's-level program is linked to some broad-based student learning goal (from Section I: Mission and Broad-Based Goals).



## Section II: Student Learning Assessment (Cont'd)

<input type="checkbox"/>	For each intended student learning outcome in each master's-level program, the O/A plan identifies the 'Key Learning Outcomes for Master's-Level Business Programs' to which that outcome is linked.
<input type="checkbox"/>	The intended student learning outcomes for each master's-level program substantially encompass the 'Key Learning Outcomes for Master's-Level Business Programs.'
<input type="checkbox"/>	The intended student learning outcomes are program-level outcomes, not course-level outcomes (i.e., they clearly describe what students are expected to know and be able to do at the conclusion of each master's-level degree program.)
<input type="checkbox"/>	The intended student learning outcomes are appropriate to master's-level programs (i.e., they reflect appropriate master's-level knowledge, skills, and competencies).
<input type="checkbox"/>	The intended student learning outcomes are measurable, are stated using active verbs (e.g., according to Bloom's Taxonomy of Educational Objectives), and clearly describe the knowledge, skills, abilities, competencies, attitudes, and values that students are expected to acquire as a result of completing their master's-level programs of study.
<input type="checkbox"/>	For each master's-level business program for which the academic business unit is seeking accreditation, the O/A plan identifies both direct and indirect measures of student learning that will be used to assess the program's student learning outcomes.
<input type="checkbox"/>	For each direct and indirect measure of student learning in each master's-level program, the O/A plan identifies the intended student learning outcomes that are assessed by that measure.
<input type="checkbox"/>	None of the direct measures of student learning in each master's-level program are course-level assessments (i.e., they are not exams, assignments, or other tasks in individual courses, modules, or classes except in the case of those instruments used in an end-of-program, capstone course, module, or class).
<input type="checkbox"/>	All direct learning assessment measures in each master's-level program actually assess the intended student learning outcomes that they are designed to measure as specified in the student learning assessment tables (i.e., they contain required student performance components or tasks that students are required to complete that are directly related to the intended learning outcomes).
<input type="checkbox"/>	Except in the case of objective-type comprehensive examinations, the direct learning assessment measures in each master's-level program are accompanied by evaluation rubrics that contain performance criteria that are directly and explicitly tied back, related, or mapped to the intended student learning outcomes in the program that the instruments are designed to measure.
<input type="checkbox"/>	In the case of objective-type comprehensive examinations that are being used as direct learning assessment measures, the exams in each master's-level program contain subsets of questions that are directly and explicitly tied back, related, or mapped to the intended learning outcomes that the exams are designed to measure.

<b>Section II: Student Learning Assessment (Cont'd)</b>	
<input type="checkbox"/>	All indirect measures of student learning in each master's-level program contain items, questions, or components that are directly and explicitly tied back, related, or mapped to the intended student learning outcomes that they are designed to measure.
<input type="checkbox"/>	Each intended student learning outcome in each master's-level program is assessed by at least one direct measure and at least one indirect measure of student learning.
<input type="checkbox"/>	For each direct and indirect measure of student learning in each master's-level program, the O/A plan specifies the performance objectives (measurable performance targets/criteria) that will be used by the academic business unit to determine the extent to which the intended student learning outcomes are being achieved.
<input type="checkbox"/>	The performance objectives (measurable performance targets/criteria) for each direct measure of student learning in each master's-level program are expressed in terms of desired performance ratings on learning-outcome-related evaluation criteria in the evaluation rubrics associated with that measure, or in the case of objective-type comprehensive examinations, in terms of desired performance levels on each subset of exam questions associated with each intended learning outcome that it is designed to measure.
<input type="checkbox"/>	No overall grades, percentage scores, or marks on any learning assessment instrument are being used as direct measures of student learning. In addition, the "completion of a task or assignment" is not being used as a direct measure of student learning.
<input type="checkbox"/>	The performance objectives (measurable performance targets/criteria) for each indirect measure of student learning in each master's-level program are expressed in terms of desired results on learning-outcome-related items/questions in the instruments.
<input type="checkbox"/>	The performance objectives (measurable performance targets/criteria) for each indirect measure of student learning in each master's-level program are not expressed in terms of student satisfaction with instructors, teaching, courses, etc.
<b>Learning Assessment for Doctoral-Level Programs</b>	
<input type="checkbox"/> Not Applicable	
<input type="checkbox"/>	The O/A plan articulates intended student learning outcomes for each doctoral-level business program for which the academic business unit is seeking accreditation.
<input type="checkbox"/>	For each intended student learning outcome in each doctoral-level program, the O/A plan identifies the broad-based student learning goals (from Section I: Mission and Broad-Based Goals) to which that outcome is linked.
<input type="checkbox"/>	Each intended student learning outcome in each doctoral-level program is linked to some broad-based student learning goal (from Section I: Mission and Broad-Based Goals).
<input type="checkbox"/>	For each intended student learning outcome in each doctoral-level program, the O/A plan identifies the 'Key Learning Outcomes for Doctoral-Level Business Programs' to which that outcome is linked.
<input type="checkbox"/>	The intended student learning outcomes for each doctoral-level program substantially encompass the 'Key Learning Outcomes for Doctoral-Level Business Programs.'

## Section II: Student Learning Assessment (Cont'd)

<input type="checkbox"/>	The intended student learning outcomes are program-level outcomes, not course-level outcomes (i.e., they clearly describe what students are expected to know and be able to do at the conclusion of each doctoral-level degree program.)
<input type="checkbox"/>	The intended student learning outcomes are appropriate to doctoral-level programs (i.e., they reflect appropriate doctoral-level knowledge, skills, and competencies).
<input type="checkbox"/>	The intended student learning outcomes are measurable, are stated using active verbs (e.g., according to Bloom's Taxonomy of Educational Objectives), and clearly describe the knowledge, skills, abilities, competencies, attitudes, and values that students are expected to acquire as a result of completing their doctoral-level programs of study.
<input type="checkbox"/>	For each doctoral-level business program for which the academic business unit is seeking accreditation, the O/A plan identifies both direct and indirect measures of student learning that will be used to assess the program's student learning outcomes.
<input type="checkbox"/>	For each direct and indirect measure of student learning in each doctoral-level program, the O/A plan identifies the intended student learning outcomes that are assessed by that measure.
<input type="checkbox"/>	None of the direct measures of student learning in each doctoral-level program are course-level assessments (i.e., they are not exams, assignments, or other tasks in individual courses, modules, or classes except in the case of those instruments used in an end-of-program, capstone course, module, or class).
<input type="checkbox"/>	All direct learning assessment measures in each doctoral-level program actually assess the intended student learning outcomes that they are designed to measure as specified in the student learning assessment tables (i.e., they contain required student performance components or tasks that students are required to complete that are directly related to the intended learning outcomes).
<input type="checkbox"/>	Except in the case of objective-type comprehensive examinations, the direct learning assessment measures in each doctoral-level program are accompanied by evaluation rubrics that contain performance criteria that are directly and explicitly tied back, related, or mapped to the intended student learning outcomes in the program that the instruments are designed to measure as specified in the student learning assessment tables.
<input type="checkbox"/>	In the case of objective-type comprehensive examinations that are being used as direct learning assessment measures, the exams in each doctoral-level program contain subsets of questions that are directly and explicitly tied back, related, or mapped to the intended learning outcomes that the exams are designed to measure.
<input type="checkbox"/>	All indirect measures of student learning in each doctoral-level program contain items, questions, or components that are directly and explicitly tied back, related, or mapped to the intended student learning outcomes that they are designed to measure.
<input type="checkbox"/>	Each intended student learning outcome in each doctoral-level program is assessed by at least one direct measure and at least one indirect measure of student learning.

## Section II: Student Learning Assessment (Cont'd)

<input type="checkbox"/>	For each direct and indirect measure of student learning in each doctoral-level program, the O/A plan specifies the performance objectives (measurable performance targets/criteria) that will be used by the academic business unit to determine the extent to which the intended student learning outcomes are being achieved.
<input type="checkbox"/>	The performance objectives (measurable performance targets/criteria) for each direct measure of student learning in each doctoral-level program are expressed in terms of desired performance ratings on learning-outcome-related evaluation criteria in the evaluation rubrics associated with that measure, or in the case of objective-type comprehensive examinations, in terms of desired performance levels on each subset of exam questions associated with each intended learning outcome that it is designed to measure.
<input type="checkbox"/>	No overall grades, percentage scores, or marks on any learning assessment instrument are being used as direct measures of student learning. In addition, the “completion of a task or assignment” is not being used as a direct measure of student learning.
<input type="checkbox"/>	The performance objectives (measurable performance targets/criteria) for each indirect measure of student learning in each doctoral-level program are expressed in terms of desired results on learning-outcome-related items/questions in the instruments.
<input type="checkbox"/>	The performance objectives (measurable performance targets/criteria) for each indirect measure of student learning in each doctoral-level program are not expressed in terms of student satisfaction with instructors, teaching, courses, etc.

Proceed to Section III on the following page.

Section III: Operational Assessment	
<input type="checkbox"/>	The O/A plan articulates intended operational outcomes for the academic business unit.
<input type="checkbox"/>	For each intended operational outcome, the O/A plan identifies the broad-based operational goals (from Section I: Mission and Broad-Based Goals) to which that outcome is linked.
<input type="checkbox"/>	Each intended operational outcome is linked to some broad-based operational goal (from Section I: Mission and Broad-Based Goals).
<input type="checkbox"/>	The intended operational outcomes are measurable and clearly describe the specific desired results for the academic business unit's critical success factors (CSFs) or key performance indicators (KPIs).
<input type="checkbox"/>	The O/A plan identifies the measures, instruments, or methods that will be employed to assess the intended operational outcomes of the academic business unit.
<input type="checkbox"/>	For each assessment measure, instrument, or method, the O/A plan identifies the intended operational outcomes that are assessed by that measure, instrument, or method.
<input type="checkbox"/>	All operational assessment measures, instruments, or methods contain items, questions, or components that are directly related to the intended operational outcomes that they are designed to measure as specified in the operational assessment table.
<input type="checkbox"/>	Each intended operational outcome is assessed by at least one operational assessment measure, instrument, or method.
<input type="checkbox"/>	For each assessment measure, instrument, or method, the O/A plan specifies performance objectives (measurable performance targets/criteria) for that measure, instrument, or method that will be used by the academic business unit to determine the extent to which the intended operational outcomes are being achieved.
<input type="checkbox"/>	The performance objectives (measurable performance targets/criteria) for each operational assessment measure, instrument, or method are expressed in terms of desired results on the operational-outcome-related items/questions/components in the measures/instruments/methods.

Proceed to Section IV on the following page.

#### Section IV: Linkage of Outcomes Assessment with Strategic Planning and Budgeting

<input type="checkbox"/>	The O/A plan provides a description of the academic business unit and institutional strategic planning and budgeting processes (structures, steps, timetables, etc.).
<input type="checkbox"/>	The O/A plan provides a description of the ways in which the results from implementing the outcomes assessment plan (i.e., changes and improvements needed) are linked to the strategic planning processes of both the academic business unit and the institution.
<input type="checkbox"/>	The O/A plan provides a description of the ways in which the academic business unit's outcomes assessment process is linked to the institutional budgeting process.

Proceed to Section V on the following page.

## Section V: Appendices

<input type="checkbox"/>	The appendices to the O/A plan contain blank copies of all direct measures of student learning.
<input type="checkbox"/>	The appendices to the O/A plan contain blank copies of all indirect measures of student learning.
<input type="checkbox"/>	The appendices to the O/A plan contain blank copies of all operational assessment measures/instruments.
<input type="checkbox"/>	If the academic business unit is employing an examination provided by an external vendor as a direct measure of student learning, the appendices to the O/A plan contain an exam content description rather than a copy of the actual exam.
<input type="checkbox"/>	The appendices to the O/A plan contain blank copies of all evaluation rubrics associated with the direct measures of student learning.