**Evaluation Form**

**Outcomes Assessment Plan**

**Instructions For Site Team**

Evaluations are to be approached from the institution’s perspective and alignment with IACBE expectations, not from the reviewer’s perspective or what is done at the reviewer’s institution. Evaluation of each area requiring review is to be based on the extent to which compliance with IACBE’s expectations has been demonstrated. Final evaluations are assigned one of three assessment levels, with consideration given to the information provided in the Outcomes Assessment Plan, insight gained during the site visit, and the OAP additional documentation provided (Appendices).

After this instructional component this form is separated into the four sections of the OAP: Mission and Broad-Based Goals, Operational Assessment, Student Learning Assessment, Linkages, Appendices, Summary and Conclusions.

The following rubric is provided to ensure inter-rater reliability and consistency in the application of each evaluation level. Recommendations for general improvement are to be discussed during the site visit during one of the peer mentoring opportunities (OAP discussion, meetings with primary representative and designees, end of day exits, etc). Mark an X in the column for the team’s final evaluation level.

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| **Yes** | **Limited** | **No** |
| Compliance with IACBE’s expectations has been satisfactorily demonstrated with no deficiencies. There are no areas in need of improvement in the demonstration of compliance. | Compliance with IACBE’s expectations has been demonstrated, but areas of potential deficiency in that demonstration were identified. Recommendations for improvement are provided. | Compliance with IACBE’s expectations has not been demonstrated. |

* An indication of “Yes” means all programs meet the expectation. No further action on your part is needed.
* An indication of “Limited” means that while all programs meet compliance with the line item the team has recommendations for improving demonstration of compliance. In other words, compliance = yes, but with Recommendation(s) to be included in the Report of Findings.
* An indication of “No” can be applied in two ways:

1. All programs do not meet compliance with the line item.

* + For each item marked “No”, in the Team Summary for that section indicate the line item number and details of the deficiency(ies) that needs to be addressed to demonstrate compliance with IACBE expectation. These will be included in the Report of Findings.

2. There is at least one program (but not all of the programs) that does not meet compliance with the line item.

* + In the Team Summary for that Section, provide details on the deficiency(ies) – and identify which program(s) it applies to. These will be included in the Report of Findings, but specific only to the program(s) you identify.

**EXAMPLE** for Mission statement & Broad-Based Goals:

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| **Team Summary: Mission and Broad-Based Goals** |
| **NO: Explain deficiency to be addressed** |
| 3- While all KLOs are identified as being covered, ISLO #5 is linked to KLO 7 (Management and Leadership) but the linkage is not appropriate. The school was unable to provide an explanation of where Management and Leadership are covered within the core curriculum.  4 – Some of the Broad-Based Student Learning Goals (BBSLG) are statements of specific student skills that will be gained: they are not broad-based statements. For example, BBSG # 2: “Students will demonstrate ability to utilize analytical tools for developing business solutions.” |
| **LIMITED: Provide Recommendations for improvement** |
| 7 – The list of Broad-Based Operational Goals (BBOGs) includes 6 goals. Some of these can be consolidated into more wholistic statements so that they are truly Broad-Based goals for the business unit. |

**EXAMPLE** for a Limited in Intended Student Learning Outcomes:

Scenario is that there are 5 total programs, but only two inadequately map the ISLOs to the KLOs…

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| **LIMITED: Provide Recommendations for improvement** |
| 3 – The Key Learning Outcomes are not appropriately mapped to the ISLOs. PROGRAMS AFFECTED:  Bachelor of Marketing  Masters in Organizational Management |

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| **Institution:** |  |
| **Business Unit (if different)** |  |

| **Mission Statement & Broad-Based Goals** | | **Yes** | **Limited** | **No** |
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| 1 | The mission of the business unit/school is appropriate to a post-secondary institution and delivery of quality business education. |  |  |  |
|  | **Broad-Based Student Learning Goals** |  |  |  |
| 2 | There is one set of broad-based goals for all students in all programs seeking accreditation: an overarching goal statement applicable to all business students. |  |  |  |
| 3 | The broad-based student learning goals clearly describe what students will be, have achieved, understand, or value as a result of completing their programs of study. (not what the school will do or provide) |  |  |  |
| 4 | The broad-based student learning goals are not measurable: they are wholistic, aspirational/visionary statements. |  |  |  |
| 5 | Each broad-based student learning goal is related to or supports some aspect of the business unit’s mission. |  |  |  |
| 6 | Each broad-based student learning goal is being evaluated. In other words, each is linked to at least one intended student learning outcome in each business program (from Section II: Student Learning Assessment). |  |  |  |
|  | **Broad-Based Operational Goals** |  |  |  |
| 7 | The OAP contains a listing of broad-based operational goals for the business unit. |  |  |  |
| 8 | The broad-based operational goals clearly describe what the business unit will do, will provide, or intends to accomplish in terms of its overall organizational and functional performance. *Considerations:*   * These statements are for the business unit/school overall, not specific to any program or degree level. |  |  |  |
| 9 | The broad-based operational goals are not measurable: they are wholistic, aspirational/visionary statements. |  |  |  |
| 10 | Each broad-based operational goal is related to or supports some aspect of the business unit’s mission. |  |  |  |
| 11 | Each broad-based operational goal is being evaluated. In other words, each is linked to at least one intended operational outcome (from Section III: Operational Assessment). |  |  |  |

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| **Team Summary: Mission and Broad-Based Goals** |
| **NO: Explain deficiency to be addressed** |
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| **LIMITED: Provide Recommendations for improvement** |
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| LIAISON NOTES |
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| **Commissioner Review: Mission and Broad-Based Goals** | | | |
| **Review 1** | **YES** | **YES – Note(s)** | **NO** |
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| **Review 2** | **YES** | **YES – Note(s)** | **NO** |
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| **FINAL** | **YES** | **YES – Note(s)** | **NO** |
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| **Intended Operational Outcomes** | | **Yes** | **Limited** | **No** |
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| 1 | The OAP articulates Intended Operational Outcomes (IOOs) for the overall business unit.  - not for a program or degree level |  |  |  |
| 2 | For each IOO, the OAP identifies each broad-based operational goal to which that outcome is linked. (may be more than one) |  |  |  |
| 3 | The IOOs are not statements regarding student performance. |  |  |  |
| 4 | The IOOs are statements of the specific desired operational outcome of the business unit. |  |  |  |
| 5 | The IOOs are measurable. |  |  |  |
| 6 | Each IOO is assessed by at least one assessment measure. |  |  |  |
| **Operational Assessment Measures & Performance Objectives (targets)** | | | | |

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| 7 | The OAP identifies which IOO(s) are evaluated by each assessment measure |  |  |  |
| 8 | All operational assessment measures clearly evaluate the business unit's achievement of each IOO they are designed to assess  i.e., they contain questions, components, etc. that are directly related to evaluation of the IOO |  |  |  |
| 9 | The OAP specifies performance objectives (targets/benchmarks) for each assessment measure that will be used to determine the extent to which each IOO is being achieved. |  |  |  |
| 10 | The performance objectives are expressed in terms of desired results on the assessment measure's components tied to the IOO being assessed. |  |  |  |

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| **Team Summary: Operational Assessment** |
| **NO: Explain deficiency to be addressed** |
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| **LIMITED: Provide Recommendations for improvement** |
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| **Commissioner Review: Operational Assessment** | | | |
| **Review 1** | **YES** | **YES – Note(s)** | **NO** |
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| **Review 2** | **YES** | **YES – Note(s)** | **NO** |
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| **FINAL** | **YES** | **YES – Note(s)** | **NO** |
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| **Intended Student Learning Outcomes** | | **Yes** | **Limited** | **No** |
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| 1 | The OAP articulates one set of Intended Student Learning outcomes (ISLOs) for each core business curriculum. *Considerations:*   * The set of ISLOs sufficiently represent outcomes expected for the core curriculum being evaluated. |  |  |  |
| 2 | Each ISLO identifies broad-based student learning goal(s) that it supports/evaluates, and the linkage is appropriate. |  |  |  |
| 3 | Each ISLO identifies the IACBE Key Learning Outcome(s) that it incorporates, and the linkage is appropriate. |  |  |  |
| 4 | The ISLOs for each program substantially encompass the current IACBE Key Learning Outcomes. “Substantially” means that all KLOs are covered, but at a minimum of 6/7. *Considerations:*   * If one of the KLOs is not covered, request an explanation regarding how the missing KLO is covered within the curriculum. Were they able to adequately demonstrate that it is covered to some degree within the curriculum? |  |  |  |
| 5 | The ISLOs are program-level outcomes, not course-level outcomes. In other words, they clearly describe what students are expected to know and be able to do at the conclusion of the program, not at the end of a course – think comprehensive, retained knowledge. |  |  |  |
| 6 | The ISLOs are appropriate to the degree level of the program. In other words, the knowledge, skills, and competencies are appropriate for the program’s degree level. Considerations:   * Is the expected achievement level appropriate to the degree level relative to the expected outcomes for that degree level at that institution. * Is expected achievement level progressively higher as the degree level increases (consider Bloom’s taxonomy and recommended verbiage). * Use of Bloom’s verbiage, while highly recommended, is not required |  |  |  |
| 7 | The ISLOs are measurable: stated using active verbs. |  |  |  |
| 8 | Each ISLO can be demonstrated by and evaluated for each individual student.  - this includes evaluation of demonstration of teamwork and/or leadership |  |  |  |
| 9 | Each ISLO is a statement of a single intended outcome: includes only one action verb, e.g. “analyze” not “identify and analyze”. *Considerations:*   * Assessments are program-end demonstration of student achievement, as such the “higher level verb” is what is to be evaluated |  |  |  |
| 10 | Each ISLO clearly states what skill, knowledge, or competency each individual student will demonstrate/exhibit to evidence achievement of the ISLO. |  |  |  |
| 11 | The ISLOs are not statements regarding completion of a work product, project, assignment. |  |  |  |

- Review capstone projects, thesis papers, final comprehensive assignments to ensure what student are producing/demonstrating aligns with ISLOs.

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| **Team Summary: Intended Student Learning Outcomes** |
| **NO: Explain deficiency to be addressed** |
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| **LIMITED: Provide Recommendations for improvement** |
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| **Commissioner Review: Intended Student Learning Outcomes** | | | |
| **Review 1** | **YES** | **YES – Note(s)** | **NO** |
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| **Review 2** | **YES** | **YES – Note(s)** | **NO** |
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| **FINAL** | **YES** | **YES – Note(s)** | **NO** |
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| **Assessment Measures/Tools** | | **Yes** | **Limited** | **No** |
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| 1 | For each assessment instrument listed, the school has indicated which ISLO(s) the instrument evaluates. |  |  |  |
| 2 | It is clear that the instrument evaluates individual student achievement of each ISLO it is meant to evaluate. *Considerations:*   * Rubric components can’t evaluate more than one ISLO |  |  |  |
| 3 | Each ISLO is evaluated at least twice (evaluated by two different assessment measures)   * NOTE: IACBE does not limit the number of assessment measures. If a school wishes to use 12 assessment measures and evaluate each ISLO nine times, that is ok as long as they are collecting, reporting, and analyzing all of the corresponding data |  |  |  |
| 4 | Each ISLO is evaluated at least once with a direct assessment measure. |  |  |  |
| 5 | Assessment measures are terminal evaluation tools – administered at the end of the program. In other words, individual course exams or activities administered prior to the end of the program are not used. |  |  |  |
| 6 | All assessment measures of student learning actually evaluate the level of individual student achievement of the ISLOs that they are designed to assess. *Considerations:*   * Does the instrument contain required components - questions, demonstrations, etc. - that directly evaluating the ISLO(s) identified as being assessed |  |  |  |
| 7 | Each assessment instrument is designed to ensure every student is individually demonstrating their level of achievement of each ISLO that the instrument assesses. |  |  |  |
| 8 | Each assessment instrument is designed to ensure each student is observed and evaluated on an individual basis for achievement of each ISLO the instrument assesses. *Considerations:*   * Is data able to be collected at the individual student level * Does the group project have a rubric for individual student performance of the ISLO(s) the project is being used to assess |  |  |  |
| 9 | Each direct measure of student learning is designed for the evaluation to be conducted by the instructor or relevant subject matter expert (such as an internship supervisor).   * Peer-to-peer evaluations are not appropriate |  |  |  |
| 10 | For cases other than comprehensive examinations, the direct measures of student learning in each program have accompanying evaluation rubrics with performance criteria clearly and directly evaluate the ISLO(s) it is intended to assess. *Considerations:*   * Each ISLO is clearly evaluated by at least one rubric component. Full evaluation of student achievement of an ISLO may require more than one rubric component but meeting the performance target on each of those components is required for the student to have met achievement of the ISLO. * Each rubric component can only evaluate – map back to – one ISLO. |  |  |  |
| 11 | In the case of comprehensive examinations, the exams contain subsets of questions that are directly and explicitly tied to evaluation of the ISLO being assessed. *Considerations:*   * For standardized testing such as Peregrine, individual student scores in a subject area directly evaluate the ISLO it is intended to assess. * Exams may be able to evaluate an ISLO re-teamwork/leadership depending on how the ISLO is stated. * Each question can only evaluate – map back to – one ISLO. |  |  |  |
| 12 | All indirect measures of student learning contain required components - questions, etc. - that evaluate student achievement of the ISLO(s) identified as being assessed. *Considerations:*   * Is it clear which questions on an exit survey are the student’s self-evaluation of achievement of each ISLO * Survey questions are not about whether the program/school prepared students * e.g. NOT – "The program prepared me to perform in a team environment.” |  |  |  |

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| **Team Summary: Assessment Measures/Tools** |
| **NO: Explain deficiency to be addressed** |
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| **LIMITED: Provide Recommendations for improvement** |
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| **Commissioner Review: Assessment Measures/Tools** | | | |
| **Review 1** | **YES** | **YES – Note(s)** | **NO** |
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| **Review 2** | **YES** | **YES – Note(s)** | **NO** |
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| **FINAL** | **YES** | **YES – Note(s)** | **NO** |
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| **Performance Objectives (targets)** | | **Yes** | **Limited** | **No** |
| 1 | For each assessment measure, the OAP specifies the performance objectives (measurable targets/criteria/benchmarks) that will be used to determine the extent of student achievement of the ISLO being assessed.   * The school identifies what their targets will be. IACBE does not required specific benchmarks or comparison to any national data. |  |  |  |
| 2 | Each performance objective is a measurement of individual student achievement: they are not evaluations of team performance or group work. *Considerations:*   * Is an indicator of group achievement being used such as a class or group median, mean, or average? * Is the assessment measure able to produce data at the individual student achievement level? |  |  |  |
| 3 | Performance objectives are specific to individual student achievement of the ISLO(s) being assessed. Considerations:   * Are overall grades, percentage scores, or marks are used? * Is the objective simply completion of a task or assignment? |  |  |  |
| 4 | Student satisfaction is not used as a performance objective for any measure – direct or indirect – of student learning. |  |  |  |
| 5 | For cases other than comprehensive examinations, the performance objectives for each direct measure of student learning are expressed in terms of desired results on the specific performance criteria (rubric component) that evaluates the ISLO(s) being assessed. |  |  |  |
| 6 | In the case of comprehensive examinations, the performance objectives are expressed in terms of a benchmark for each subset of exam questions that evaluate the ISLO(s) being assessed. *Considerations:*   * For standardized testing such as Peregrine, the performance objective is the target for individual student scores in a subject area that evaluates an ISLO. |  |  |  |
| 7 | The performance objectives for each indirect measure of student learning are expressed in terms of desired results on the required components - questions, etc. - that evaluate student achievement of the ISLO(s) being assessed. |  |  |  |

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| **Team Summary: Performance Objectives** |
| **NO: Explain deficiency to be addressed** |
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| **LIMITED: Provide Recommendations for improvement** |
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| **Commissioner Review: Performance Objectives** | | | |
| **Review 1** | **YES** | **YES – Note(s)** | **NO** |
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| **Review 2** | **YES** | **YES – Note(s)** | **NO** |
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| **FINAL** | **YES** | **YES – Note(s)** | **NO** |
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| **Linkages to Planning and Budgeting** | | **Yes** | **Limited** | **No** |
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| This is a narrative section that provides a clear picture of the linkage between the OAP and strategic planning/budgeting processes. At a minimum, it: | | | | |
| 1 | * Describes the business unit and institutional strategic planning and budgeting processes (structures, steps, timetables, etc.). |  |  |  |
| 2 | * Explains how the business unit uses results/data from implementation of the OAP to identify needed changes and/or improvements. |  |  |  |
| 3 | * Details how these identified changes and/or improvements are linked to (incorporated into) the strategic planning processes of both the business unit and the institution. |  |  |  |
| 4 | * Identifies the ways in which the business unit’s outcomes assessment process is linked to the institutional budgeting process. |  |  |  |

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| **Team Summary: Linkages** |
| **NO: Explain deficiency to be addressed** |
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| **LIMITED: Provide Recommendations for improvement** |
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| **Appendices** | | **Yes** | **Limited** | **No** |
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|  | The appendices that accompany the OAP include (at a minimum): | | | |
| 1 | * blank copies of all direct measures of student learning   + If the business unit is using an examination provided by an external vendor, an exam content description rather than a copy of the actual exam is to be provided   + For all projects/assignments that are being used, an example of the assignment itself |  |  |  |
| 2 | * blank copies of all evaluation rubrics associated with the direct measures of student learning |  |  |  |
| 3 | * blank copies of all indirect measures of student learning |  |  |  |
| 4 | * blank copies of all operational assessment measures |  |  |  |
| 5 | * each relevant component of all assessment measures and rubrics (e.g. each question, evaluation criteria, etc.) clearly identifies which ISLO/IOO it is directly evaluating. Not all line items need to be mapped, but all ISLOs/IOOs the tool is meant to evaluate must be identified   + e.g. next to each assessment/rubric component, the ISLO/IOO being evaluated is noted |  |  |  |

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| **Team Summary: Appendices** |
| **NO: Explain deficiency to be addressed** |
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| **LIMITED: Provide Recommendations for improvement** |
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| LIAISON NOTES |
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| **OVERALL SUMMARY COMMENTS/OBSERVATIONS** |
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**TEAM FINAL RECOMMENDATION**

Based on the information provided in the above analysis, the site team makes the following recommendation specific to the forward-looking Outcomes Assessment Plan (check one):

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|  | All programs and the business unit demonstrate compliance with IACBE expectations.  (check if applicable) There are team Recommendations for improvement (as detailed in sections above) |
|  | Not all programs and/or the business unit demonstrate compliance with IACBE expectations and support an Action Finding for Principle 2.  (check if applicable) There are also team Recommendations for improvement (as detailed in sections above) |

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| **SITE TEAM MEMBERS** | |
| Team chair: |  |
| Team Member: |  |

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| **IACBE STAFF LIAISON notes**: |
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