**Unit Assessment Checklist**

**July-August**

Assessment Coordinator submits annual assessment reflection for previous fiscal year no later than July 31[[1]](#footnote-1)

Prepare for annual assessment check-in meeting

Directors inform Kelly Ball who should be invited (*at minimum:* leadership and assessment coordinators)

Share a draft of the reflection with Kelly Ball *BEFORE* your meeting if you would like feedback

SALT members and Directors outline unit-level goals for the next fiscal year[[2]](#footnote-2)

Directors and Assessment Coordinators brainstorm which activities, programs, services, or initiative should be assessed in the next plan

Directors and Assessment Coordinators and Kelly Ball discuss the following at annual assessment check-in meeting:

Previous year’s reflection

Upcoming Assessment Plan

Review data/metrics required for Divisional Key Performance Indicators

**September-October**

Assessment Coordinator submits assessment plan draft for feedback no later than Oct. 31

**November-December**

Assessment Committee provides feedback on plan draft using rubric

The unit reviews the assessment committee’s feedback on the plan and makes any revisions

Assessment Coordinator submits final assessment plan no later than Dec. 31

**January-May**

Directors and Assessment Coordinators periodically review the annual assessment plan and note progress

The Assessment Coordinator stores supporting evidence in the Student Affairs Assessment Teams folder (e.g., aggregated survey results, meeting minutes, notes, reports, handouts, etc.)

The Assessment Coordinator stores any protected data in the SA Assessment folder (e.g., student-level data, raw data, evaluations, portfolios, student reflections, etc.)

Unit staff obtain release forms for any photos to be used reporting or in the annual Divisional report

**June**

Directors and Assessment Coordinators draft the assessment reflection

Directors and Assessment Coordinators attend annual Assessment Coordinators and Directors annual meeting

1. DOS and UREC might need additional time as their data reporting does not align with the fiscal year [↑](#footnote-ref-1)
2. Larger units might need to be broken down into smaller sub-units for assessment purposes. [↑](#footnote-ref-2)