

Worksheet for Assessment Planning

This worksheet is designed to help you plan your assessment from start to finish. Begin by considering the purpose of your assessment, including the key questions you are asking, and your stakeholders. Next, document the way that you plan to implement the assessment. Finally, articulate who will perform the data analysis, what types of reporting will be generated, and how the results will be communicated.

Keys to Success:

- The numbered items are basic information that will help you plan your assessment.
- Bulleted items in the yellow boxes are provided as guides to the type of details you should be considering in your assessment plan, but may not be relevant for every project.

Assessment Purpose:

1. What program/service(s) are you assessing?
2. What are the key questions guiding your assessment (what, specifically, do you want to know)?
3. Why is this assessment important for your department's functions and improvement?
4. Identify the stakeholders. Who will be affected by this assessment? For example, will this assessment affect individuals outside the department?

For further thought:

- What are the specific outcomes or components of the program/service(s) you wish to assess?
- How does this assessment project relate to your departmental mission, objectives or goals (or those of Student Affairs)?
- Why are you choosing to assess this particular program/service?
- What are the significance and implications of this assessment?
- Is there any link to previous assessment?
- How will the information gathered in this assessment help inform or improve your program or services?
- How might this assessment inform goals in Student Affairs more broadly?

Assessment Methods and Implementation

1. Identify the method you will use for this assessment.
2. Outline the key logistical steps in your assessment and the timeline for implementation.

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3. Identify the resources needed to implement this assessment.
4. Discuss the ethical considerations and how you will protect participant privacy and confidentiality.

For further thought:

- What is an appropriate method to address the question(s) you are asking? Why choose this method over other methods?
- What is the data collection time frame?
- What are the key steps for your assessment given your chosen methodological approach? Who is responsible for each step in this design?
- What is your sample for this assessment? How many participants will you have?
- How will you recruit the sample for this assessment? (Identifying, contacting and incentivizing participants)
- What steps will you take to ensure the confidentiality of your participants?
- What is the total estimated cost of this assessment? What are the resources needed that are not covered in the budget? (Materials, personnel, incentives)
- Is the expertise required to implement your assessment plan within your department or outside of the department? Where else will you have to look for the expertise to execute this plan?

Analysis and Reporting:

5. How will you analyze and report results?
6. Who are the key stakeholders for this assessment, and how will you communicate with them?

For further thought:

- What are the steps needed to prepare the data?
- What specific analyses are planned (means, percentages, thematic analysis, comparison of groups, transcription, etc.)?
- What is the time frame and who are the personnel needed for these steps?
- What format will the report take? Will you need different formats for different audiences?