

**DOCUMENT TITLE:** Planning Retreat Summary Report

**ORIGIN:** Office of the President

**SUMMARY:** This document illustrates the process AGS used to evaluate progress toward its institutional effectiveness goals, by collecting and analyzing relevant data, and using these data to inform decisions for continued advancement in the 2019-2020 academic year. The objectives for our Planning Retreat included the following:

- To explore the future direction for the Adler Graduate School in context of the Institutional Effectiveness Plan (IEP).
- To review data and operationalize goals in the IEP.
- To reinforce a cultural commitment to assessment and continuous improvement process.
- To prepare team members for active participation in the Higher Learning Commission (HLC) accreditation process.
- To connect retreat participants to build team and create consensus for the plans leading to the future growth of AGS.

**Theme: Looking to the Future:**

Adler Graduate School's first annual retreat focused on planning for the future.

**Participants:** Faculty, staff, students, alumni, board members

**Guest Facilitator:** Randall Ross, HR Executive in the Greater Minneapolis-St. Paul Area

**Location:** Adler Graduate School

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# Planning Retreat: Summary Report

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*Adler's Assessment  
Planning Retreat*

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June 21, 2019

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## Assessment Results & Action Plan

### Goal 1.1.2

**100% of programs have a developmental course sequence. Student advising plans are created in a developmental sequence by July 2019.**

Date Reviewed:	6/21/2019
Review Team:	Team leader: Amy Team members: Doug, Bre, Roseina, Heather, Bobby

### STEP 1: Collect Data

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*Circle the Value addressed:*    **Quality Education**    **Adlerian Principles**    **Diversity**    **Institutional Stability**

<b>Performance Indicator addressed</b>
<i>What performance indicator is being addressed?</i>
Goal 1.1.2: 100% of programs have a developmental course sequence. Student advising plans are created in a developmental sequence by July 2019.
Guiding questions: <ul style="list-style-type: none"> <li>• Are advisors creating initial program plans, for all students, that follow a developmental order? (compare with “master” course sequencing charts)</li> <li>• Are students following their plans? (If not, why not?)</li> <li>• Is the master schedule supporting program completion as initially scheduled? (Use programs that had to be modified to compare and identify reasons leading to changes)</li> </ul>

**State the Type(s) of Evidence Gathered**

*To assess the outcome or answer the assessment question, what evidence was collected and is being analyzed?*

- Copy of Master Schedule
- Each Program’s Developmental Course Sequence

**STEP 2: Analyze Data**

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**As you analyze your data, consider both the guiding questions specific to your goal and the following global questions, then list your conclusions below.**

1. *Is the goal, program, or service **relevant** to institutional effectiveness?*
2. *How much **progress** has been made toward the goal?*
3. *Is this course of action/service/program **effective** in meeting the expected results?*
4. *Is the course of action/service/program the most **efficient** way to achieve the expected results (consider both financial and human resources)?*
5. *What is the **impact** of this course of action/service/program on AGS’ ability to accomplish its mission and broad strategic goals?*

**STEP 3: Identify Opportunities**

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**List potential opportunities for improvement.**

*Choose target area(s) based on 1-5 in analysis.*

- Seeking student feedback data from students regarding their initial experiences during term one as a graduate student. Was it manageable; did they feel supported; suggestions for improvement; etc. A student self care/graduate school support survey possible in the second or third term.
- Considering a break session into the program to mitigate the need for students taking sessions off.

## STEP 4: Action Plan

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<b>Summarize the Actual Results</b>
<b>In addition to the actual results, were there additional conclusions or discoveries? If so, list.</b>
<ul style="list-style-type: none"> <li>Review data on how many students self select off sessions throughout their program. Are we looking at data on student stress levels and burn out; how are we doing this and do we know if students are keeping up in courses? Do we need to then build in one break period beyond the break week for self-care?</li> </ul>
<b>Action Plan Steps</b>
<i>List possible action steps. Arrange steps into a preliminary plan. Please be specific. Include a timeline and key people as appropriate.</i>
<ul style="list-style-type: none"> <li>Move the master calendar to program chairs and map out one year of course dates and instructors one year at a time; July to July</li> <li>Move 503 to first term second class and move 505 to the second term first class because the group felt students need to start off their course programming with a strong foundation of Adlerian Psychology AND of the counseling profession. This change also better orientates students to the professional with the start to their graduate and professional identity.</li> </ul>
<b>Unanswered questions and open items</b>
<i>What are some unanswered questions or open items that need further exploration and/or data?</i>

## STEP 5: Report

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<i>Reporting the action plan helps to close the feedback loop. Who should know the results of this analysis? How will this be reported?</i>

NEXT

**Assessment Results & Action Plan**

**Goal 1.2.1**

**Each academic program will *develop and implement* a program evaluation plan; plans will include 1) evaluation of curricular and co-curricular activities and 2) processes that promote student professional dispositions.**

Date Reviewed:	6/21/19
Review Team:	Team Leader: Nicole Team members: Craig, Letitia, Louise, Trinidad

**STEP 1: Collect Data**

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*Circle the Value addressed:*    **X Quality Education**    **Adlerian Principles**    **Diversity**    **Institutional Stability**

<p><b>Performance Indicator addressed</b> <i>What performance indicator is being addressed?</i></p> <p>Goal 1.2.1: Each academic program will <i>develop and implement</i> a program evaluation plan; plans will include 1) evaluation of curricular and co-curricular activities and 2) processes that promote student professional dispositions.</p> <p><u>Guiding Questions:</u></p> <ul style="list-style-type: none"> <li>• Do we have evaluation plans for all programs?</li> <li>• Do these plans cover all the areas necessary to inform program improvement?</li> <li>• How are we using Program Advisory Groups?</li> <li>• What areas of program evaluation do we have data in?</li> <li>• What areas can be identified for improvement?</li> </ul>
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<p><b>State the Type(s) of Evidence Gathered</b>  <i>To assess the outcome or answer the assessment question, what evidence was collected and is being analyzed?</i></p>
<p>Program Evaluation Plan template  Curriculum Map  Summary of Program Evaluation purpose and goals</p>

## STEP 2: Analyze Data

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<p><b>As you analyze your data, consider both the guiding questions specific to your goal and the following global questions, then list your conclusions below.</b></p> <ol style="list-style-type: none"> <li>6. <i>Is the goal, program, or service <b>relevant</b> to institutional effectiveness?</i></li> <li>7. <i>How much <b>progress</b> has been made toward the goal?</i></li> <li>8. <i>Is this course of action/service/program <b>effective</b> in meeting the expected results?</i></li> <li>9. <i>Is the course of action/service/program the most <b>efficient</b> way to achieve the expected results (consider both financial and human resources)?</i></li> <li>10. <i>What is the <b>impact</b> of this course of action/service/program on AGS' ability to accomplish its mission and broad strategic goals?</i></li> </ol>
<p>The purpose of program evaluation is to gather evidence through an assessment plan (process) to improve curricula and teaching effectiveness. The focus is on determining aggregate rather than individual performance and employs a range of methods including:</p> <ul style="list-style-type: none"> <li>• Analysis of program components and processes <ul style="list-style-type: none"> <li>○ intake process</li> <li>○ student evaluations</li> </ul> </li> </ul>



- exit survey
- student handbook
- surveys of student and alumni experiences
- direct observations of student and faculty behaviors
- Analysis of SLO assessment results
  - examinations
  - portfolios
  - student work samples
  - LT assessment

**Good program evaluation includes:**

- methods and procedures that are clear
- a specific time frame for action planning
- a feedback loop to inform decisions
- action plans
- benchmark dates and responsible persons

Each program needs to have a program evaluation plan filled out to have a systematic way to measure effectiveness. Progress has been made in developing these plans, however, there was a need to develop them further. This team developed a plan to systematically analyze student learning data. This plan will work with all programs. Specific program data analysis will be determined by each program.

### STEP 3: Identify Opportunities

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**List potential opportunities for improvement.**  
*Choose target area(s) based on 1-5 in analysis.*

We found that it would be more efficient to review odd number courses on odd years and even number courses on even years. We also found that there is a need to have a face to face meeting with Field Experience coordinators to determine what evals they have that can be launched sooner than later.

We also need to set a date for all LT data (signature assessments) to be completed.

## STEP 4: Action Plan

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### Summarize the Actual Results

We updated the program evaluation plan and determined that all CORE courses would follow the below assessment structure:

ODD Course #s in Odd years (Summer): 505, 513, 533, 541, 511, 523, 525

EVEN Course #s in Even years (Summer): 500, 504, 512, 536, 604

All Program Specific courses will follow the below structure. We used “end of fiscal year” to allow each program to set a timeframe for their analysis.

ODD Course #s in Odd years. To be done by end of fiscal year.

EVEN Course #s in Even years. To be done by end of fiscal year.

Field Experience data: Aggregated data bi-annually

Disposition Forms: 20% random sample (of active enrolled students in program) Disposition data (google docs) specific to student self-eval and faculty evaluation of student. Frequency TBD by programs.

Instructor evaluations and observations: Annually throughout the year. Need to determine how aggregated data will be evaluated.

Advising data: Aggregated data annually in Spring and Fall

What is our retention, persistence, and completion rate - Annually in Fall

All program specific documents will be evaluated annually per program. Dates TBD and filled out on form for each program.

**In addition to the actual results, were there additional conclusions or discoveries? If so, list.**

SmartEvals has an advising survey that we can use – we need to investigate this survey and determine usefulness.  
We can use instructor evaluation data to help us determine Professional Development plans.

**Action Plan Steps**

*List possible action steps. Arrange steps into a preliminary plan. Please be specific. Include a timeline and key people as appropriate.*

1. Complete Program Evaluation Plan with new information.
2. Bring to Academic Council (AC) for review.
3. AC to determine date to complete and upload LT signature assessments.
4. Program Chairs will fill out rest of form with their dates for measuring program specific data.
5. All program evaluation forms will be posted on Assessment Website for transparency.

**Unanswered questions and open items**

*What are some unanswered questions or open items that need further exploration and/or data?*

- Need to set up a meeting with Field Experience Coordinators to determine what forms/evals they have and how they are using them.

- Need to meet with Training coordinator to determine when he sets schedule for trainings. This will determine when we look at faculty evaluation aggregated data.

## **STEP 5: Report**

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*Reporting the action plan helps to close the feedback loop. Who should know the results of this analysis? How will this be reported?*

- Bring new Program Evaluation to Academic Council for final approval.
- Collect revised forms from Program Chairs.
- Post on website.

**NEXT**

**Assessment Results & Action Plan**

**Goal 1.3.3**

**Create systematic use of evaluations for field experience.**

Date Reviewed:	6/21/19
Review Team:	Team Leader: Rashida Team members: Erin, Teresa, Amy Wald

**STEP 1: Collect Data**

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*Circle the Value addressed:    Quality Education    Adlerian Principles    Diversity    Institutional Stability*

<b>Performance Indicator addressed</b>
<i>What performance indicator is being addressed?</i>
1.3.3: Create systematic use of evaluations for field experience.
<u>Guiding Questions:</u>
<ul style="list-style-type: none"> <li>• Do we have a systematic process for field experience evaluation?</li> <li>• Does the process include supervisor evaluation of student in at least 2 developmental stages?</li> <li>• Does the process include student evaluation of site?</li> <li>• What information does the process provide that allows us to evaluate graduate preparedness to enter the professional field?</li> <li>• What additional information may be useful?</li> <li>• Is the process efficient?</li> <li>• How can we improve?</li> </ul>

### State the Type(s) of Evidence Gathered

*To assess the outcome or answer the assessment question, what evidence was collected and is being analyzed?*

- Field Experience Manuals
- Evaluation forms (instructor evaluations, evaluation of students, evaluation of sites, evaluation for AGS field experience programs)

## STEP 2: Analyze Data

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**As you analyze your data, consider both the guiding questions specific to your goal and the following global questions, then list your conclusions below.**

11. *Is the goal, program, or service **relevant** to institutional effectiveness?*
12. *How much **progress** has been made toward the goal?*
13. *Is this course of action/service/program **effective** in meeting the expected results?*
14. *Is the course of action/service/program the most **efficient** way to achieve the expected results (consider both financial and human resources)?*
15. *What is the **impact** of this course of action/service/program on AGS' ability to accomplish its mission and broad strategic goals?*

The review committee assessed this goal as a relevant and vital to institutional effectiveness and sustainability. The systematic use of evaluations for field experience promotes accurate assessment of students' preparedness for entrance into the field. Evaluation results support program evaluation and allows for feedback informed improvements to program design and student development. Analysis of the demonstrates moderate progress has been made toward this goal.

- Each program has developed a field experience manuals and evaluation forms.
- There is a system process for use of evaluations (students, site supervisors, and instructors).

## STEP 3: Identify Opportunities

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**List potential opportunities for improvement.**

*Choose target area(s) based on 1-5 in analysis.*

- Create uniformity of rating scales used across programs and forms
- Use/ create evaluation forms to promote uniform data collection. Use one document with subset of questions specific to each specialty area.
- Identify and use one ( 1) standard data collection tool. Select the proper technology for accurate data collection and analysis.

## STEP 4: Action Plan

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**Summarize the Actual Results**

Field Experience Coordinators will work to develop standardized forms and identify subset questions.

**In addition to the actual results, were there additional conclusions or discoveries? If so, list.**

**Action Plan Steps**

*List possible action steps. Arrange steps into a preliminary plan. Please be specific. Include a timeline and key people as appropriate.*

**Unanswered questions and open items**

*What are some unanswered questions or open items that need further exploration and/or data?*

## STEP 5: Report

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*Reporting the action plan helps to close the feedback loop. Who should know the results of this analysis? How will this be reported?*

**NEXT**



**Assessment Results & Action Plan**

**Goal 1.4.3**

**Plan for systematic evaluation of faculty (full time and adjunct) will be developed and implemented 100% by Fall 2019.**

Date Reviewed:	6/21/19
Review Team:	Team Leader: Nicole Team members: Allison, Bre, Roseina, Trinidad

**STEP 1: Collect Data**

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*Circle the Value addressed:    Quality Education    Adlerian Principles    Diversity    Institutional Stability*

<p><b>Performance Indicator addressed</b> <i>What performance indicator is being addressed?</i></p> <p>1.4.3: Plan for systematic evaluation of faculty (full time and adjunct) will be developed and implemented 100% by Fall 2019.</p> <p><u>Guiding Questions:</u></p> <ul style="list-style-type: none"> <li>• Do we have a clear plan?</li> <li>• What percentage of full-time faculty (per program) has been evaluated since plan development?</li> <li>• How many still need to be evaluated in order to meet the goal?</li> <li>• Are there barriers preventing the process to run smoothly? If so, what are they?</li> <li>• What can we do to improve the process?</li> </ul>
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**State the Type(s) of Evidence Gathered**

*To assess the outcome or answer the assessment question, what evidence was collected and is being analyzed?*

- New faculty evaluation forms
- Faculty start dates and anticipated evaluation dates.
- Exit survey question data.

**STEP 2: Analyze Data**

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**As you analyze your data, consider both the guiding questions specific to your goal and the following global questions, then list your conclusions below.**

16. *Is the goal, program, or service **relevant** to institutional effectiveness?*
17. *How much **progress** has been made toward the goal?*
18. *Is this course of action/service/program **effective** in meeting the expected results?*
19. *Is the course of action/service/program the most **efficient** way to achieve the expected results (consider both financial and human resources)?*
20. *What is the **impact** of this course of action/service/program on AGS' ability to accomplish its mission and broad strategic goals?*

- For the best impact for adjunct faculty we decided that evaluations would happen based on course load. An annual evaluation is not necessary for faculty not teaching consistently throughout the year.
- Full time faculty will be evaluated yearly.
- For efficiency we determined that faculty should receive their evaluations at least 30 days prior to their evaluation. Course observations should also happen within 30 days of evaluation.

- Evaluations are relevant to teaching, service, and scholarship. We concluded that they were clear and fair. Clearly shows faculty what the basic expectations are and what is needed to move up to next level.
- We determine that the exit survey data will be more helpful when we have a full year of data to review.
- The most efficient way to implement is to:
  1. Faculty will do a self-evaluation on official form. Form to be sent 30 days prior to official evaluation sit down.
  2. Observation can be done by either the Chair OR someone the faculty chooses. The observation form will be filled out by the designated observation evaluator and given to the faculty member for the file.
  3. In the sit down the Chair reviews the self-eval and the observation form.
  4. All documents then go to HR for official file

### STEP 3: Identify Opportunities

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**List potential opportunities for improvement.**

*Choose target area(s) based on 1-5 in analysis.*

Discussion about having the observation scale the same as the evaluation scale. We determined that we will review this after the first year of roll out to see if this is needed.

In order to make the evaluations more efficient we developed a plan that provides the faculty more involvement in the evaluation and observation.

### STEP 4: Action Plan

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**Summarize the Actual Results**

Evaluation forms are in place. This team developed a more efficient way to do the faculty evaluations. (see above). The plan also allows more involvement of the faculty member. This allows the evaluation to be a full learning experience for improvement.

**In addition to the actual results, were there additional conclusions or discoveries? If so, list.**

The team determined that there were a lot of areas (teaching, scholarship, service) that need evidence of being done. Faculty should consider creating a LiveText portfolio and continue to update the portfolio throughout the year. This will allow faculty to have this information readily available when it is evaluation time. Without having a tracking system in place we think that faculty will be spending a lot of time trying to gather this evidence last minute and may miss/forget some of the work that has been done.

**Action Plan Steps**

*List possible action steps. Arrange steps into a preliminary plan. Please be specific. Include a timeline and key people as appropriate.*

1. Bring these results to Academic Council to discuss with each Chair.
2. Send out /or have evaluations in an easily accessible place for faculty. Faculty need to know what they are being evaluated on, thus the sooner we send out the forms the more prepared faculty will be.
3. Share faculty start dates will Chairs. This will help streamline the process to have this resource available.

**Unanswered questions and open items**

*What are some unanswered questions or open items that need further exploration and/or data?*

How to roll out option for LiveText portfolio.

Need to determine how to review results to help us plan Professional Development days with Training Director.

## STEP 5: Report

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*Reporting the action plan helps to close the feedback loop. Who should know the results of this analysis? How will this be reported?*

1. Bring these results to Academic Council to discuss with each Chair.
2. Send out /or have evaluations in an easily accessible place for faculty. Faculty need to know what they are being evaluated on, thus the sooner we send out the forms the more prepared faculty will be.
3. All finalized evaluations will go to HR for the faculty file.

NEXT

**Assessment Results & Action Plan**

**Goal 1.5.1**

**Develop Orientation Process for all faculty and staff.**

Date Reviewed:	6/21/19
Review Team:	Team leader: Doug Team members: Laurencio, Jeanette, Debbie, Jill P., Craig, Evette, Kathy

**STEP 1: Collect Data**

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*Circle the Value addressed:    Quality Education    Adlerian Principles    Diversity    Institutional Stability*

<p><b>Performance Indicator addressed</b> <i>What performance indicator is being addressed?</i></p> <p>1.5.1: Develop Orientation Process for all faculty and staff.</p> <p><u>Guiding Questions:</u></p> <ul style="list-style-type: none"> <li>• Is the faculty/staff orientation process well defined and described in both the employee and the faculty handbooks?</li> <li>• Do we have orientation evaluations that allow us to identify areas for improvement? If yes, what are those areas. If not, we need to develop an evaluation process.</li> <li>• How can we improve the process?</li> </ul> <p><b>State the Type(s) of Evidence Gathered</b> <i>To assess the outcome or answer the assessment question, what evidence was collected and is being analyzed?</i></p>
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#### Faculty On Boarding Process

The Faculty Onboarding process is a multi-step process designed to ensure faculty confidence and competence in beginning their work as an Adler faculty member. The process is individualized with consideration of their roles. For example, faculty members that are involved in direct teaching may differ somewhat from those involved in student support such as admissions staff or writing support. In general, the process involves meeting with our Human Relations director and Professional Development Coordinator. We strive to tailor and individualize this process for all new employees. Contact information is given to the Professional Development Coordinator.

Once an employee has completed the necessary forms and paper work, the employee's contact information is sent to the Professional Development Coordinator who is responsible for tailoring a professional development experience appropriate for their job role.

Office and administrative support staff receive the HR and IT portions mentioned below. They also participate in an overview of Adlerian Psychology from the Professional Development Coordinator, along with meeting with AGS president for a school and cultural overview.

Faculty receive a more in depth face-to-face process, either in person or via remote computer. Each Faculty member receives at least a half hour with each of the following staff to establish a working relationship, receive necessary information, and ask pertinent questions. The following staff are listed below with some of the main topics addressed in these on boarding sessions

**Professional Development Coordinator:** Adlerian overview, professional development initiatives, expectations and opportunity for faculty involvement in training and decision-making.

**HR:** Overview of benefits/ Q and A.

**Registrar:** Logging attendance, submission of grades, granting student extensions, helping students register for class.

**IT:** Overview of Sonis and Moodle and how they are used at AGS.

**Director of Quality Assurance:** Overview of role and needs from faculty concerning accreditation issues.

**Director of On Line Learning:** Establish a process with on line faculty for developing their classes, ie. Companion pages, working with Moodle, time lines.

**Program Chairs:** Establish contact for communication around department related culture and

**AGS President:** Establish initial relationship and begin articulation of core values and processes surrounding AGS.

We are currently in process of developing an **assessment** of the effectiveness of our onboarding process. We will develop a tool to identify the critical parts of our on boarding that were effective and the parts that can be improved.

**HR Responsibilities**

- |                                               |                                                                  |
|-----------------------------------------------|------------------------------------------------------------------|
| CV/Resume                                     | Philosophy of Teaching statement                                 |
| Letter of Hire signed                         | All professional/clinical licensures and certifications          |
| Job Application                               | Emergency Contact information                                    |
| Demographic Survey                            | Signed receipts from Employee Handbook                           |
| Criminal Background check W-4                 | Entered in Paycor                                                |
| Form 1-9 completed in person/authorized agent | Entered in Sonis                                                 |
| Direct deposit request                        | Request prof. photo and bio for website D Review Payroll process |
| Photo Release                                 | Submission of Faculty Invoice                                    |
| Statement                                     | Submission of Reimbursement Request Form                         |
| Job description sign-off                      |                                                                  |

**IT Responsibilities**

- |                                      |                                                                     |
|--------------------------------------|---------------------------------------------------------------------|
| Create SONIS, 0365, and Moodle       | Setup personal Printer and Install Printer                          |
| Send SONIS, 0365, Moodle Allison     | Install Microsoft Office 365, plus other software necessary for job |
| Send LiveText for Faculty            | Add Name/email address to copiers                                   |
| Create TeamViewer account on needed. | Providing Printing code and scan to email, copying and printing     |
| Add to email groups in 0365          | Assist setting up with Outlook                                      |
| Add to Alfredadler.edu website       | Uninstall any bloatware or software                                 |
| Add to digital display               | Test Mouse and Keyboard                                             |
| Setup Phone and Email Voicemail      |                                                                     |



## STEP 2: Analyze Data

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As you analyze your data, consider both the guiding questions specific to your goal and the following global questions, then list your conclusions below.

21. Is the goal, program, or service **relevant** to institutional effectiveness?
22. How much **progress** has been made toward the goal?
23. Is this course of action/service/program **effective** in meeting the expected results?
24. Is the course of action/service/program the most **efficient** way to achieve the expected results (consider both financial and human resources)?
25. What is the **impact** of this course of action/service/program on AGS' ability to accomplish its mission and broad strategic goals?

Successes:

Ongoing development of a formal and flexible Onboarding process (packet)  
Cooperative planning has included all relevant people and processes.

## STEP 3: Identify Opportunities

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List potential opportunities for improvement.

Choose target area(s) based on 1-5 in analysis.

Challenges:

Onboarding some Adjunct staff/faculty in an effective and timely manner when joining individually.  
Speed up the paperwork process – expand I9 representatives that can sign.

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## STEP 4: Action Plan

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<b>Summarize the Actual Results</b>
<p>Quality plan that will be available for future revision. Anecdotal feedback from new hires have been very positive on its entent and inclusiveness.</p>
<b>In addition to the actual results, were there additional conclusions or discoveries? If so, list.</b>
<p></p>
<b>Action Plan Steps</b>
<p><i>List possible action steps. Arrange steps into a preliminary plan. Please be specific. Include a timeline and key people as appropriate.</i></p> <p>Action Plan: Formal assessment of the effectiveness of Onboarding process Fall 2019 (6 months from creation)</p> <p>Add Student Success Services as part of the onboarding -process.</p> <p>Identify I9 personnel for signature approvals.</p>

**Unanswered questions and open items**

*What are some unanswered questions or open items that need further exploration and/or data?*

**STEP 5: Report**

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*Reporting the action plan helps to close the feedback loop. Who should know the results of this analysis? How will this be reported?*

**NEXT**

**Assessment Results & Action Plan**

**Goal 1.5.2**

**The professional development coordinator will create an effective program of professional development for faculty and staff.**

Date Reviewed:	6/21/2019
Review Team:	Team leader: Doug Team members: Laurencio, Jeanette, Debbie, Jill P., Craig, Evette, Kathy

**STEP 1: Collect Data**

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*Circle the Value addressed:    Quality Education    Adlerian Principles    Diversity    Institutional Stability*

<b>Performance Indicator addressed</b>
<i>What performance indicator is being addressed?</i>
1.5.2: The professional development coordinator will create an effective program of professional development for faculty and staff.
<u>Guiding Questions:</u>
<ul style="list-style-type: none"> <li>• Has the plan been carried out as proposed?</li> <li>• What are the strengths of the current plan?</li> <li>• What are the areas of the current plan that can be improved upon?</li> </ul>

- How could these areas be improved?

**State the Type(s) of Evidence Gathered**

*To assess the outcome or answer the assessment question, what evidence was collected and is being analyzed?*

Successes:

Overall assessment on a five point scale (Strongly Agree SA, Agree A, Neutral N, Disagree D, Strongly Disagree SD) professional development sessions were rated highly.

All questions summarized into results.

4/13/18 : Organizational Overview, Assessment, Professional Development Needs Assessment

70% Positive (Strongly Agree/Agree)

8/29/18: The Adlerian Classroom/Using the Critical Incidence Questionnaire

87% Positive (Strongly Agree/Agree)

10/26/18 Stephen Brookfield

97% Positive (Strongly Agree/Agree)

12/19/18 Sue Brokaw/Lifestyle

95% Positive (Strongly Agree/Agree)

2/8/19 Multicultural/Social Justice Awareness

100% Positive (Strongly Agree/Agree)

4/10/19 Multicultural Social Justice Application

98 % Positive (Strongly Agree/Agree)

Comments themes:

Positivity, encouraging, felt listened to, input valued, engaging, got to know other staff, value organizational transparency, importance of feedback loop with students, loved Brookfield, Multicultural Awareness/class applications valued

## STEP 2: Analyze Data

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**As you analyze your data, consider both the guiding questions specific to your goal and the following global questions, then list your conclusions below.**

26. Is the goal, program, or service **relevant** to institutional effectiveness?
27. How much **progress** has been made toward the goal?
28. Is this course of action/service/program **effective** in meeting the expected results?
29. Is the course of action/service/program the most **efficient** way to achieve the expected results (consider both financial and human resources)?
30. What is the **impact** of this course of action/service/program on AGS' ability to accomplish its mission and broad strategic goals?

July 10, 2018

**2018-9 Professional Growth Proposals (28 hours/week;  
12 hours/week School Counseling Service Center T/TH)**

**D Pelcak**

**Instructional Improvement and Skills**

- Driven by Staff input session
- The Adlerian Classroom: Triple Focus (senge)
- Focus on developing effective student-instructor feedback loop- CIQ (see attached)
- Use of discussion and Socratic method in development of Democratic Classrooms
- Potential consultation/training with Stephen Brookfield
- Trauma informed instruction

**On-boarding Process**

- Create, stream line and formalize orientation training of new instructors/staff (with Allison)

**Coordination with FEC Initiatives**

- Work with reviving and shaping the Faculty Executive purpose and function

**Multiversity Initiative**

- Proceed on identified goals and objectives from new Multiversity Strategic Plan

**Planning/Implementing Staff "Repair" Process**

- Tailor customized process to meet individual/group needs to "heal" and "re-form" relationships with past Adler staff (with Erin/Sue)

**In House Adlerian Overview**

- Offer a voluntary in-house Adlerian series for any people interested.
- Series of four two hour sessions offered during the work day.

**Re-purposing Formative/Summative Assessment using IDEA protocols**

- Restructure the ways staff receive feedback from IDEA forms.
- Expand use of IDEA resources to help improve instruction.
- Include Adlerian questions around belonging/contributing, sense of encouragement, and

### STEP 3: Identify Opportunities

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**List potential opportunities for improvement.**

*Choose target area(s) based on 1-5 in analysis.*

Challenges:

- Ease of use of technology to enhance presentations
- Question of required attendance for staff/faculty
- Involvement of Adjunct Faculty (time scheduled) and their requirements
- Identifying needs of “administrative staff” for professional development

### STEP 4: Action Plan

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**Summarize the Actual Results**

**In addition to the actual results, were there additional conclusions or discoveries? If so, list.**

**Action Plan Steps**

*List possible action steps. Arrange steps into a preliminary plan. Please be specific. Include a timeline and key people as appropriate.*

Action Plan

Request to meet with Academic Council around attendance issues and Professional Development requirements



Program Chairs: Identified Professional Development Strands: Adlerian/Andragogy/Multi-cultural Social Justice – Two sessions per Strand

Formation of Professional Development Committee for AGS that includes full time faculty, Adjunct Faculty, and administrative staff.

Completed needs assessment focus group for administrative staff produced requests for more SONIS training, multicultural awareness, and supporting students with mental health issues.

**Unanswered questions and open items**

*What are some unanswered questions or open items that need further exploration and/or data?*

## STEP 5: Report

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*Reporting the action plan helps to close the feedback loop. Who should know the results of this analysis? How will this be reported?*

NEXT

**Assessment Results & Action Plan**

**Goal 2.1.1**

**100% of curriculum will be revised to include core Adlerian competencies by June 2019, to also include key assessments.**

Date Reviewed:	6/21/19
Review Team:	Team leader: Jill S. Team members: Louise, Antwan, Amy Wald

**STEP 1: Collect Data**

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*Circle the Value addressed:    Quality Education    Adlerian Principles    Diversity    Institutional Stability*

<b>Performance Indicator addressed</b>
<i>What performance indicator is being addressed?</i>
2.1.1: 100% of curriculum will be revised to include core Adlerian competencies by June 2019, to also include key assessments.
<u>Guiding Questions:</u>
<ul style="list-style-type: none"> <li>• Cannot evaluate data yet but can come up with a plan. Have faculty review the Adlerian competencies from Portfolio and come up with a plan on how to integrate information in courses/syllabi.</li> <li>• As syllabi are being developed where and how can we add Adlerian and MSJCC?</li> </ul>

**State the Type(s) of Evidence Gathered**

*To assess the outcome or answer the assessment question, what evidence was collected and is being analyzed?*

Foundational course syllabi (500, 505, 511, 513, 525, and 523) were gathered and cross evaluated with Adlerian competencies to identify what in each of the foundational courses may already be incorporated but just not identified under Adlerian competencies, along with Key Assessments.

**STEP 2: Analyze Data**

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**As you analyze your data, consider both the guiding questions specific to your goal and the following global questions, then list your conclusions below.**

- 31. *Is the goal, program, or service **relevant** to institutional effectiveness?*
- 32. *How much **progress** has been made toward the goal?*
- 33. *Is this course of action/service/program **effective** in meeting the expected results?*
- 34. *Is the course of action/service/program the most **efficient** way to achieve the expected results (consider both financial and human resources)?*
- 35. *What is the **impact** of this course of action/service/program on AGS' ability to accomplish its mission and broad strategic goals?*

- 1. Yes.
- 2. We only had one of our foundational courses (511) including Adlerian competencies and key assessments measured.
- 3. Yes.
- 4. Yes.
- 5. It is necessary to meet our goal of 100% and assure that all foundational courses incorporate Adlerian competencies, along with key assessments to measure these. These will also then be included in LiveText and incorporated within students' portfolio's for overall evaluation.

## STEP 3: Identify Opportunities

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### List potential opportunities for improvement.

*Choose target area(s) based on 1-5 in analysis.*

We can help provide a guide for students when working on the Adlerian Competencies area within the Portfolio (e.g. see coursework from course 525 (SPT), for example).

## STEP 4: Action Plan

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### Summarize the Actual Results

We were able to identify the following Adlerian Competencies within the following courses, along with Key Assessments to measure them:

500: Research...: Adlerian Competency AS.2.R (no Key Assessment)

505: Developmental...: Adlerian Competency AS.2.R; AS.2.A (Key Assessment: SPT Part 4: Movie Analysis).

513: Comparative theories: Adlerian Competency AS.1.R, AS.1.A, AS.2.R, AS.4.R, AS.5.R

523: Multicultural...: AS.4.R, AS.4.A (Key Assessment: Social Interest in Action Presentation); AS.5.R, AS.5.A (Key Assessment: Self Awareness Paper).

525: Basic Counseling...: AS.1.R, AS.1.A (Key Assessment: Video/Transcript - Final Assignment).

We now have key assessments for four of the Adlerian Competencies (AS.1 in 525; AS.2 in 505; AS.4 and AS.5 in 523), and Adlerian Competencies in all Foundational courses.

511: Introduction to ... always had the following Adlerian Competencies (AS.1.I, AS.1.R, AS.2.I, AS.2.R, AS.3.I, AS.4.I, and AS.4.R) with Key Assessments for AS.1.R (Unit vocabulary quizzes), AS.2.R (SPT: Lifestyle Form, and Final Paper part 1), and AS.3.I (Final paper part 2).

-Note: See below for outline of Adlerian Competencies with Foundational courses where they are Introduced (I), Reinforced®, and Applied(A) with Key Assessments:

AS.1 Competency – Relational Development

KPI #1: Ability to integrate concepts for the understanding of relational management.

Introduced (I) in 511

Reinforced® in 511 (Key Assessment – Vocab. Quizzes), 513, 525

Applied (A) in 513, 525 (Key Assessment: Video/Transcript - Final Assignment)

AS.2 Competency – Systemic understanding of Human Nature and its influence on organizational health.

KPI: Understand what a healthy organization is and how members' lifestyles can promote or create barriers to its healthy functioning.

Introduced (I) in 511

Reinforced® in 511 (Key Assessment – Lifestyle Form and Final paper part 1); 500, 505, 513

Applied (A) in 505 (Key Assessment – SPT part 4: Movie Analysis)

AS.3 Competency – Encouragement in Leadership

KPI: Ability to promote an encouraging environment through leadership.

Introduced (I) in 511 (Key Assessment – Final paper part 2)

Reinforced ® in  
Applied (A) in

AS.4 Competency – Social Interest in an Organizational Structure

KPI: Ability to develop social interest in one’s self and others to promote a sense of belonging, cooperation, and resiliency.

Introduced (I) in 511

Reinforced ® in 511, 513, 523

Applied (A) in 523 (Key Assessment – Social Interest in Action Presentation)

AS.5 Competency – Systematic and Environmental Factors

KPI: Demonstrate an application of how cultural and social conditions impact the well-being of an organization.

Introduced (I) in 511

Reinforced ® in 513, 523

Applied (A) in 523 (Key Assessment - Self Awareness paper)

**In addition to the actual results, were there additional conclusions or discoveries? If so, list.**

**Action Plan Steps**

*List possible action steps. Arrange steps into a preliminary plan. Please be specific. Include a timeline and key people as appropriate.*

1. Program Chairs and/or assigned faculty to these courses will need to **update syllabi to reflect the Adlerian Competency recognized within the course, as well as the Key Assessment.** This action need be sent out.
2. Program Chairs will need to **update Program maps** to reflect which courses Adlerian Competencies have been added (I,R,A).
3. Nicole Randick to add to our Program Templates the courses as a guide to students in Adlerian Studies Competencies and Multicultural tabs (areas).

**Unanswered questions and open items**

*What are some unanswered questions or open items that need further exploration and/or data?*

## **STEP 5: Report**

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*Reporting the action plan helps to close the feedback loop. Who should know the results of this analysis? How will this be reported?*

Program Chairs  
Faculty updating Foundational Courses (511, 500, 505, 513, 525, and 523)  
Director of Online (Portfolio templates)

**NEXT**

**Assessment Results & Action Plan**

**Goal 2.1.3**

**Practicum and internship experiences include opportunities for students to incorporate Adlerian Principles in their work and to demonstrate social interest in action.**

Date Reviewed:	6/21/19
Review Team:	Team leader: Meg Williams Team members: Teresa, Heather, Brittney, Alicia

**STEP 1: Collect Data**

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*Circle the Value addressed:    Quality Education    Adlerian Principles    Diversity    Institutional Stability*

<b>Performance Indicator addressed</b>
<i>What performance indicator is being addressed?</i>
2.1.3: Practicum and internship experiences include opportunities for students to incorporate Adlerian Principles in their work and to demonstrate social interest in action.
<u>Guiding Questions:</u>
<ul style="list-style-type: none"> <li>• Do our Field Experience manuals help students learn how to incorporate Adlerian principals in their work? For example, we have a case conceptualization form that has a foundation in Adlerian concepts. Are we using this?</li> <li>• Do we ask our students how they are integrating what they are learning into their work with clients?</li> <li>• Are there FE meetings where this topic is discussed?</li> <li>• Are students intentionally putting social interest in action at their internship sites? What is the proof of this?</li> <li>• What and how can we improve?</li> </ul>



### State the Type(s) of Evidence Gathered

*To assess the outcome or answer the assessment question, what evidence was collected and is being analyzed?*

- Field Experience syllabi
- Case Conceptualization Form
- Field Experience Manuals

## STEP 2: Analyze Data

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As you analyze your data, consider both the guiding questions specific to your goal and the following global questions, then list your conclusions below.

36. Is the goal, program, or service **relevant** to institutional effectiveness?

37. How much **progress** has been made toward the goal?

38. Is this course of action/service/program **effective** in meeting the expected results?

39. Is the course of action/service/program the most **efficient** way to achieve the expected results (consider both financial and human resources)?

40. What is the **impact** of this course of action/service/program on AGS' ability to accomplish its mission and broad strategic goals?

- Currently, there is no formal data being collected on this *Performance Indicator* other than what is in the Signature Assessments (not yet launched for Field Experience) and what is being observed in presentations. We need to compile this information in order to formalize this goal.
- Students may learn, practice, and use Adlerian principles, including social interest and case conceptualization in their interactions with classmates during class meetings.
- We know that in the recently updated case conceptualization used in Field Experience courses, Adlerian concepts are expected to be touched on including the use of E.R.s and discussion of the client's life tasks. This Case Conceptualization has

been recently updated and standardized across counseling specialty programs at AGS. Field Experience text now includes an Adlerian-specific text on Case Conceptualization (Sperry & Sperry).

### STEP 3: Identify Opportunities

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**List potential opportunities for improvement.**

*Choose target area(s) based on 1-5 in analysis.*

We identified that it would be wise to ensure that students are receiving theoretical instruction and practical demonstration of Adlerian concepts and interventions in prior courses as well as Intro to Field Experience and Practicum.

### STEP 4: Action Plan

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**Summarize the Actual Results**

- Update the Case Conceptualization Rubric
- Poll students on perception of opportunities to use social interest and Adlerian concepts in their Field Experience sites via Course Evaluation or Student Evaluation of Site

**In addition to the actual results, were there additional conclusions or discoveries? If so, list.**

**Action Plan Steps**

*List possible action steps. Arrange steps into a preliminary plan. Please be specific. Include a timeline and key people as appropriate.*

- Steps to be determined at next Field Experience Meeting.
- Update the Case Conceptualization Rubric
- Poll students on perception of opportunities to use social interest and Adlerian concepts in their Field Experience sites via Course Evaluation or Student Evaluation of Site

**Unanswered questions and open items**

*What are some unanswered questions or open items that need further exploration and/or data?*

- What additional data is wanted related to this Indicator (2.1.3)?
- How will that data be used and what is the purpose of gathering it?
- If students are required to use Adlerian Principles (e.g. E.R's, Life Style Assessment), what prior courses are teaching, reinforcing, and applying those methods and tools?
- Are we looking to assess students' opportunities in their coursework or their client work?

**STEP 5: Report**

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*Reporting the action plan helps to close the feedback loop. Who should know the results of this analysis? How will this be reported?*

- Field Experience Team

**NEXT**

**Assessment Results & Action Plan**

**Goal 2.2.2**

**Trainings, forums, and other activities that promote a sense of belonging, significance, and social interest among staff and faculty are offered consistently throughout the year**

Date Reviewed:	6/21/19
Review Team:	Team leader: Doug Team members; Laurencio, Jeanette, Debbie, Jill P., Craig, Evette, Kathy

**STEP 1: Collect Data**

*Circle the Value addressed:    Quality Education    Adlerian Principles    Diversity    Institutional Stability*

<b>Performance Indicator addressed</b>
<i>What performance indicator is being addressed?</i>
2.2.2: Trainings, forums, and other activities that promote a sense of belonging, significance, and social interest among staff and faculty are offered consistently throughout the year.
<u>Guiding Questions:</u>
<ul style="list-style-type: none"> <li>• What does the training agenda look like? Do they promote Adlerian principles?</li> <li>• Is there engagement in our forums and trainings? What are the outcomes?</li> <li>• Are we implementing activities that promote employee engagement?</li> <li>• Provide a list of activities that we current do. Did we collect artifacts from these activities? Are there outcomes from them?</li> <li>• How can we improve?</li> </ul>

**State the Type(s) of Evidence Gathered**

*To assess the outcome or answer the assessment question, what evidence was collected and is being analyzed?*

Successes

Formation of the Faculty Forum

**Mission: We are a forum to discuss issues involving faculty welfare. Ideas and initiatives for the betterment of the school will be considered. We function in an advisory capacity to the president. Issues that impact faculty can be brought to this group. Membership in this group is open to all faculty at any time with the exception of identified members on work groups on specific tasks.**

Minimal Qualifications of AGS Faculty

Protocol For Student Professional Disposition

Adjunct Contract Template

Developed Three Tiered Contract for AGS adjuncts reflective of organizational values/culture of encouragement, social interest, and responsibility

Begin discussion of the need and format for AGS faculty rankings

Provide feedback/suggestions on use of faculty development funds

Adlerian Basics Class

“Healing” event

Professional Development Session evaluation responses to items around Collaboration/Encouragement/ Getting to Know Others

96% Positive (Strongly Agree/Agree)

Professional Development comments: enjoyed accommodations for learning styles, experiencing a new faculty member, budget transparency, emotional climate positive and helpful, need to be/feel valued, feel optimistic about the future, make greater effort to connect with colleagues, feel energized

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## STEP 2: Analyze Data

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As you analyze your data, consider both the guiding questions specific to your goal and the following global questions, then list your conclusions below.

41. Is the goal, program, or service **relevant** to institutional effectiveness?
42. How much **progress** has been made toward the goal?
43. Is this course of action/service/program **effective** in meeting the expected results?
44. Is the course of action/service/program the most **efficient** way to achieve the expected results (consider both financial and human resources)?
45. What is the **impact** of this course of action/service/program on AGS' ability to accomplish its mission and broad strategic goals?

Level	Pay Scale	Requirements				Professional Development Plan	
		Education	Professional Development Trainings	Program Chair Evaluations	Teaching Experience		
1	\$900.00/ Credit	A minimum of a Master's degree with five years of clinical/direct experience	<p>Completion of 3 out of 6 Required Professional Development Sessions Annually, one of each of the following strands are required;</p> <ol style="list-style-type: none"> <li>1. Andragogy</li> <li>2. Multicultural</li> <li>3. Adlerian Training</li> </ol> <p><i>(Each strand will have two sessions offered annually. Adjunct faculty can attend all 6 sessions if they desire, but are only required to complete one from each strand. Sessions will be offered on campus and online).</i></p>	Satisfactory- See Attached Faculty Evaluation Form	Demonstrated experience in teaching/professional training experience	<p>0-2 years</p>	<p>Completed onboarding process including an Adlerian/Pedagogy Overview X day training</p> <p>In collaboration with the program chair, complete a tailored professional development plan. This plan can include;</p> <ul style="list-style-type: none"> <li>• conference</li> <li>• presentations</li> <li>• committee membership</li> <li>• service projects</li> <li>• community volunteer efforts</li> <li>• publications</li> <li>• training focused on pedagogy</li> <li>• community impact interventions such as; service centers, mobile art lab, etc.</li> </ul> <p>Professional Development plan should include a goals section specifically tailored to student survey feedback</p>





2	\$1,000.00/ Credit	A minimum of a Master's degree with five years of clinical/direct experience	Completion of 3 out of 6 Required Professional Development Sessions Annually, one of each of the following strands are required; <b>1. Pedagogy</b> <b>2. Multicultural</b> <b>3. Adlerian Training</b>  (Each strand will have two sessions offered annually. Adjunct faculty can attend all 6 sessions if they desire, but are only required to complete one from each strand, sessions will be offered on campus and online).	Satisfactory See Attached Faculty Evaluation Form	1-3 years of demonstrated higher ed teaching experience (college level and graduate level)	3-6 years  Years of experience requirement can be waived with a doctoral degree in Counselor Education and Supervision or equivalent program in specific counseling discipline or a Master's degree with five years of clinical/direct experience and 30+ credits of education post masters or ABD. Program Chairs have the discretion to assess if the waiver applies. Basic Level of Adlerian Standards have been documented.	In collaboration with the program chair, complete a tailored professional development plan. This plan can include; <ul style="list-style-type: none"><li>• conference presentations</li><li>• membership committee</li><li>• service projects</li><li>• community volunteer efforts</li><li>• publications</li><li>• training focused on pedagogy</li></ul> Interventions such as; service centers, mobile art lab, etc.  Professional Development plan should include a goals section specifically tailored to student survey feedback. Develop a plan for Completion of PROFICIENT LEVEL Adlerian Competencies Literature Based Training. Training will be in a Read and Reflect format on selected Articles with final approval on a Standards Rubric.
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3	\$1,150.00/ Credit	A minimum of a Master's degree with five years of clinical/direct experience	<p>Completion of 3 out of 6 Required Professional Development Sessions Annually, one of each of the following strands are required;</p> <ol style="list-style-type: none"> <li>1. Pedagogy</li> <li>2. Multicultural</li> <li>3. Adlerian Training</li> </ol> <p>(Each strand will have two sessions offered annually. Adjunct faculty can attend all 6 sessions if they desire, but are only required to complete one from each strand, sessions will be offered on campus and online).</p>	Satisfactory See attached Faculty Evaluation Form	4 + years of demonstrated higher ed teaching experience (college level and graduate level)	7+ Years Years of experience requirement can be waived with a doctoral degree in Education and Counselor Supervision or equivalent program in specific counseling discipline. Basic and Proficient Level of Adlerian Standards have been documented. Program Chairs have the discretion to assess if the waiver applies. Basic and Proficient Level of Adlerian Standards have been documented	<p>In collaboration with the program chair, complete a tailored professional development plan. This plan can include;</p> <ul style="list-style-type: none"> <li>• conference presentations</li> <li>• committee membership</li> <li>• service projects</li> <li>• community volunteer efforts</li> <li>• publications</li> <li>• training focused on pedagogy</li> </ul> <p>interventions such as; service centers, mobile art lab, etc.</p> <p>Professional Development plan should include a goals section specifically tailored to student survey feedback.</p> <p>Develop a plan for Completion of <b>ADVANCED LEVEL</b> Adlerian Competencies Literature Based Training. Training will be in a Read and Reflect format on selected Articles with final approval on a Standards Rubric.</p>
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Faculty Forum has been a productive and functioning unit where participants feel their advisory input is valued (Session Feedback)

### **STEP 3: Identify Opportunities**

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**List potential opportunities for improvement.**

*Choose target area(s) based on 1-5 in analysis.*

Challenges

Increase the amount of faculty involvement in the Forum: non-coercive encouragement  
Introducing relevant/desired training for “administrative” staff

### **STEP 4: Action Plan**

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**Summarize the Actual Results**

**In addition to the actual results, were there additional conclusions or discoveries? If so, list.**

**Action Plan Steps**

*List possible action steps. Arrange steps into a preliminary plan. Please be specific. Include a timeline and key people as appropriate.*

Action Plan

Develop a three-tiered process for AGS adjuncts to improve/apply Adlerian concepts based on a Read and Reflect self-paced model

Continue work group input on development of faculty rankings.

<b>Unanswered questions and open items</b> <i>What are some unanswered questions or open items that need further exploration and/or data?</i>

## **STEP 5: Report**

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<i>Reporting the action plan helps to close the feedback loop. Who should know the results of this analysis? How will this be reported?</i>

**NEXT**

**Assessment Results & Action Plan**

**Goal 2.3.1**

**Increase Adlerian training opportunities to community members and stakeholders to promote a sense of belonging and social interest in action.**

Date Reviewed:	6/21/19
Review Team:	Team leader: Ev Team members: Alumni, Marcie, Christina, Parker, Ray, Student 3

**STEP 1: Collect Data**

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*Circle the Value addressed:    Quality Education    Adlerian Principles    Diversity    Institutional Stability*

<b>Performance Indicator addressed</b> <i>What performance indicator is being addressed?</i>
2.3.1: Increase Adlerian training opportunities to community members and stakeholders to promote a sense of belonging and social interest in action.

Guiding Questions:

- Have we increased our Adlerian training offerings to community members and stakeholders? How many trainings do we have per month/year? How do we advertise these trainings to our community members? Is our attendance adequate? Do we need to work on increasing attendance? How might we do this?
- Review our social media and website: Are we doing a good job promoting our trainings? Are these engaging posts?
- Who is attending these trainings?
- What and how can we improve?

**State the Type(s) of Evidence Gathered**

*To assess the outcome or answer the assessment question, what evidence was collected and is being analyzed?*

- Evidence Gathered – 851 people attended workshops in the past year. 395 were students 68 were people outside of the institute
- and alumni that chose to come out. These numbers include the total number of people attending workshops and does account
- for the repeat clients. \$8,700 in 2018 for 64 workshops approximately 3-4 workshops a month.

**STEP 2: Analyze Data**

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**As you analyze your data, consider both the guiding questions specific to your goal and the following global questions, then list your conclusions below.**

46. Is the goal, program, or service **relevant** to institutional effectiveness?

47. How much **progress** has been made toward the goal?

48. Is this course of action/service/program **effective** in meeting the expected results?

49. Is the course of action/service/program the most **efficient** way to achieve the expected results (consider both financial and human resources)?

50. What is the **impact** of this course of action/service/program on AGS' ability to accomplish its mission and broad strategic goals?

- Analyze Data – It is relevant. We are looking for a potential growth of 5% of outside attendees
- Some statistics gathered but need much more information.
- This is the best way to find out what we need to offer.

### **STEP 3: Identify Opportunities**

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**List potential opportunities for improvement.**

*Choose target area(s) based on 1-5 in analysis.*



- Identify Opportunities – Providing institute and alumni information at AGS promotional tables at different events.
- Looking at reaching out to communities such as parents or having open houses. Possibly connecting to organizations
- and offering trainings.

## STEP 4: Action Plan

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### Summarize the Actual Results

We need more data to efficiently identify the content of future workshops to coincide with the needs of the community. We will reach out to a greater number of organizations which are not directly connected to the school.

### In addition to the actual results, were there additional conclusions or discoveries? If so, list.

We need to take the Institute on the road, so to speak, to reach an audience of community member who could benefit from Adlerian training.

We need more social media exposure.

### Action Plan Steps

*List possible action steps. Arrange steps into a preliminary plan. Please be specific. Include a timeline and key people as appropriate.*

- – Gathering more data, Identify and segment an audience and gather again in the fall to analyze the data. How many are repeat customers and how many are new per workshop for the Institute.
- Gathering metrics that are relevant to our goals. Id info and people by events. Seeking out what is relevant for courses. Determining does the institute increase involvement with AGS.

**Unanswered questions and open items**

*What are some unanswered questions or open items that need further exploration and/or data?*

How to gather more lists of outside attendees to add to Constant Contact.  
How to build a budget to do more advertising.

**STEP 5: Report**

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*Reporting the action plan helps to close the feedback loop. Who should know the results of this analysis? How will this be reported?*

The Alumni Board, the school President. The Finance Committee.

**NEXT**

## Assessment Results & Action Plan

### Goal 3.1.1

**Development of a plan for providing training aimed at increasing faculty and staff Multicultural and Social Justice competence.**

Date Reviewed:	6/21/19
Review Team:	Team Leader: Doug Team members: Laurencio, Jeanette, Debbie, Jill P., Craig, Evette, Kathy

### STEP 1: Collect Data

*Circle the Value addressed:    Quality Education    Adlerian Principles    Diversity    Institutional Stability*

<b>Performance Indicator addressed</b> <i>What performance indicator is being addressed?</i>
3.1.1: Development of a plan for providing training aimed at increasing faculty and staff Multicultural and Social Justice competence.
<u>Guiding Questions:</u> <ul style="list-style-type: none"> <li>• Do we have a plan that integrates MSJCC's into our training?</li> <li>• What can we learn from the attendance and evaluations?</li> <li>• What can be improved and how can we improve?</li> </ul>
<b>State the Type(s) of Evidence Gathered</b> <i>To assess the outcome or answer the assessment question, what evidence was collected and is being analyzed?</i>

#### Successes

Identification of Multicultural/Social Justice Strand (theme) as core in our PD by Academic Council

Completed two three hour multicultural trainings.

Overall ratings of Multicultural/Social Justice objectives around understanding concepts, likelihood of using activities presented, and feeling “growth challenged” by the experience  
100% Positive (Strongly Agree/ Agree)

Comments: Engaging authentically with peers, exercises on privilege, need to begin the “conversations”, looking at the system I live and work in, Circle of Voices, provide more equality in the classroom, changing from a “safe” space to a “brave” space, no more excuses to avoid and gloss over discussions on race.

## STEP 2: Analyze Data

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**As you analyze your data, consider both the guiding questions specific to your goal and the following global questions, then list your conclusions below.**

51. *Is the goal, program, or service **relevant** to institutional effectiveness?*
52. *How much **progress** has been made toward the goal?*
53. *Is this course of action/service/program **effective** in meeting the expected results?*
54. *Is the course of action/service/program the most **efficient** way to achieve the expected results (consider both financial and human resources)?*
55. *What is the **impact** of this course of action/service/program on AGS’ ability to accomplish its mission and broad strategic goals?*

Very positive response to initial trainings. Faculty requests more work on this area with focus on awareness and classroom applications.

Administrative staff requests more training in the area.

### STEP 3: Identify Opportunities

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**List potential opportunities for improvement.**

*Choose target area(s) based on 1-5 in analysis.*

Challenges

Plan sessions that apply to all AGS employees in this area (planning Committee?)

Multicultural competencies/activities not fully integrated into classes.

Role of Student Success Services?

Involvement of Adjunct faculty.

### STEP 4: Action Plan

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**Summarize the Actual Results**

More work and emphasis for entire AGS in this area.

**In addition to the actual results, were there additional conclusions or discoveries? If so, list.**

**Action Plan Steps**

*List possible action steps. Arrange steps into a preliminary plan. Please be specific. Include a timeline and key people as appropriate.*

Action Plan

Formation of Professional Development Committee for AGS that includes full time faculty, Adjunct Faculty, and administrative staff to identify areas/topics/vehicle to help guide/plan/input.

**Unanswered questions and open items**

*What are some unanswered questions or open items that need further exploration and/or data?*

**STEP 5: Report**

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*Reporting the action plan helps to close the feedback loop. Who should know the results of this analysis? How will this be reported?*

**NEXT**

**Assessment Results & Action Plan**

**Goal 3.1.4**

**Develop a plan for recruitment of members for the Board of Directors that increases diversity.**

Date Reviewed:	6/21/19
Review Team:	Team Leader: Rich Team members: Jan, John, Suz

**STEP 1: Collect Data**

*Circle the Value addressed:    Quality Education    Adlerian Principles    Diversity    Institutional Stability*

<p><b>Performance Indicator addressed</b> <i>What performance indicator is being addressed?</i></p> <p>3.1.4: Develop a plan for recruitment of members for the Board of Directors that increases diversity.</p> <p><u>Guiding Questions:</u></p> <ul style="list-style-type: none"> <li>• How diverse is our current board?</li> <li>• Would we benefit from increased diversity? If so, what particular characteristics would be beneficial to the board?</li> <li>• What is or current recruitment strategy? How does it intentionally address the desired increase in diversity?</li> <li>• What and how can we improve?</li> </ul>
<p><b>State the Type(s) of Evidence Gathered</b> <i>To assess the outcome or answer the assessment question, what evidence was collected and is being analyzed?</i></p> <p><b>A.</b> The current Adler Graduate School Board comprises of 14% visible minorities, nearly 30% female and 30% senior persons (ages 65+) (respectively).</p>

B. The Board of Adler Graduate School is initiating a Board of Director recruitment plan and strategy to increase the opportunity for diversity on the Board. The recruitment plan is to expand the Board’s visibility to represent the populations in which Adler Graduate School serves that includes internal stakeholders such as faculty, staff, and students and our external stakeholders such as the overarching communities, educational partners, community relation partners, public and private organizations who meet Adler Graduate Schools vision and mission. Aligned with Adler Graduate School’s employee recruitment guidelines, the Board strives to attract members who represent diverse populations and will not discriminate based on race, creed, color, national origin, religion, sex, age, disability, sexual orientation, veteran status, marital status, familial status, or public assistance, and is committed to providing equal Board membership opportunities in accordance with all applicable Federal and State laws, including Title IX of the Education Amendments of 1972.

Specific characteristics that would benefit the Board of Directors would be persons who not only represent the characteristics above, yet as well have the following:

- Extensive professional experience with significant leadership accomplishments in business, education, psychology, non-profit or other needed skills.
- Passion for the cause, to contribute to the board and committee, and give time needed on a longer term basis (i.e. 5 years)
- Financially committed – willing to contribute
- Strategic and critical thinking – long term and short term. Data based decision making, able to set and see the way to implement
- Sense of inquiry and curiosity
- Collaborative yet assertive, willing to voice their POV and willing to challenge where needed
- Team player
- Thoughts provoking yet insightful
- Personal qualities of integrity, credibility, and a passion for improving the lives of AGS’s beneficiaries

C. The current recruitment strategy exemplifies the need to align the Board members with the stakeholders it serves both internal and external. The recruitment strategy will include the use of multiplatform tools, such as Social media, Higher Education and Non-Profit management recruitment platforms that have a larger reach in diverse communities.



D. The Board has developed a Board Member recruitment plan that will commence August of 2019. The recruitment plan is to enhance the current skills sets of the Board and to further develop the representation of the Board to the college community and community at large. Given the nature of the recruitment plan and its implementation, the Board is hopeful that the recruitment plan will improve the diversity of the Board.

## STEP 2: Analyze Data

As you analyze your data, consider both the guiding questions specific to your goal and the following global questions, then list your conclusions below.

56. Is the goal, program, or service **relevant** to institutional effectiveness?

57. How much **progress** has been made toward the goal?

58. Is this course of action/service/program **effective** in meeting the expected results?

59. Is the course of action/service/program the most **efficient** way to achieve the expected results (consider both financial and human resources)?

60. What is the **impact** of this course of action/service/program on AGS' ability to accomplish its mission and broad strategic goals?

1. Yes, the goal of developing a robust recruitment plan that exemplifies diversity is relevant to institutional effectiveness in that, a) it provides synergy across all levels of institutional oversight, b) broadens the perspective of the Governing Board of Directors that corresponds to the internal and external stakeholders of Adler Graduate School and c) enables the Board of Directors to develop and sustain a level of competence surrounding issues of inclusion.

2. The recruitment plan is currently in the final stages of development. The initiation of the recruitment plan will occur in August 2019. The goal of the recruitment plan and strategies is to develop a well-rounded Board of Directors that will reflect the internal and external stakeholders it serves.

3. The recruitment plan is the most efficient method to attract the diversity of Board members and to meet the goals of the college's mission and vision. As such, the recruitment and diversification of its Board members will only provide a well-rounded voice to the communities the college serves.

4. The impact to increase diversity on the Board of Directors is to broaden the perspective of the Governing body of Adler Graduate School that reflects the populations and stakeholders we serve. The recruitment plan is the tool by which Adler Graduate School's Board of Directors will be able to enact the college's mission and enhance the overarching goal of increased inclusion as well as diversity.

### STEP 3: Identify Opportunities

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**List potential opportunities for improvement.**

*Choose target area(s) based on 1-5 in analysis.*

1. Recognition that Adler Graduate School's Board of Directors current recruitment plan lacked the opportunity to develop an inclusive and diverse Board of Directors

As such the ability to diversify the Board of Director's will enable the following:

2. By expanding Adler Graduate School's Board of Directors to represent an inclusive Board of Directors, provides synergy across the governing bodies of the college and its various stakeholders
3. Inclusion and diversity of the Board of Directors allows for the college to foster collaboration and a sense of belonging across the communities we serve.
4. Engage community members to partake in dialogue opportunities otherwise considered unavailable or unattainable
5. Adler Graduate School's Board of Directors to represent an inclusive Board of Directors, provides opportunities for increased representation within the community of Adlerian Schools and their communities.

### STEP 4: Action Plan

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**Summarize the Actual Results**

The recruitment plan will engage in partnerships with communities, organizations and persons who represent such communities in open dialogue to increase the inclusivity of the Board of Directors.

**In addition to the actual results, were there additional conclusions or discoveries? If so, list.**

The intentionality of engaging in a recruitment plan to include processes to increase diversity amongst its members is a benefit to the organization.

**Action Plan Steps**  
*List possible action steps. Arrange steps into a preliminary plan. Please be specific. Include a timeline and key people as appropriate.*

At this juncture, the recruitment plan is as follows:

**Recruiting New Board Members**

A Nominating Committee will be established annually by the Governance Committee to recruit and orient new Board members. The following is an overview of the committee’s responsibilities:

<b>Action Step</b>		<b>Action Step</b>		<b>Action Step</b>	
<b>Marketing</b>	<b>Date</b>	<b>Recruiting</b>	<b>Date</b>	<b>Onboarding</b>	<b>Date</b>
Create the job posting	Completed	Prescreen candidates and determine who will be invited to interview	August 2019	Conduct orientation onsite, when practical	September 2019
Advertise in selected media	In progress (as of July 2019)	Conduct interviews	August 2019	Provide Board Handbook, Employee Handbook and Bylaws documents	September 2019
Solicit support of key stakeholders in networking	In progress (as of July 2019)			Match new Board member with a “buddy” for first year	September 2019

Form an interview team Determine the interviewing process		Select candidates to meet with Board Chair Present slate of candidates to full Board for approval	September 2019	Make public announcement Assess performance and provide feedback at 6 month mark	March 2020
<b>Unanswered questions and open items</b> <i>What are some unanswered questions or open items that need further exploration and/or data?</i>					
<p>Understanding the impact of the diversification of the Board of Directors to the internal and external stakeholders regarding Board policies and procedures and overall practice.</p>					

## STEP 5: Report

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<p><i>Reporting the action plan helps to close the feedback loop. Who should know the results of this analysis? How will this be reported?</i></p>
<p>The results of the recruitment plan should be provided to the Board of Directors, the Governance Committee of the Board of directors, the Executive team of Adler Graduate School including the president and both Academic and Student Affairs counterparts, faculty and staff and external stakeholders within the community Adler Graduate School.</p>

**NEXT**

## Assessment Results & Action Plan

### Goal 3.2.1

**Students will report feeling a sense of safety, belonging, and significance by the time they graduate.**

Date Reviewed:	6/21/19
Review Team:	Team leader: Meg Whiston Team members: Allison, Rachele, Michael, Juliana, Evette, Alicia

## STEP 1: Collect Data

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*Circle the Value addressed:    Quality Education    Adlerian Principles    Diversity    Institutional Stability*

<p><b>Performance Indicator addressed</b> <i>What performance indicator is being addressed?</i></p> <p>3.2.1: Students will report feeling a sense of safety, belonging, and significance by the time they graduate.</p> <p><u>Guiding Questions:</u></p> <ul style="list-style-type: none"> <li>• A question was added to the exit survey to address to what extent we are meeting this goal. Do we have any data yet?</li> <li>• What do the data tell us? What are we doing well? What needs improvement?</li> <li>• How can we improve?</li> <li>• What do students share during the Oral Exam regarding their experience at Adler?</li> <li>• What can be learned from the feedback received from the Student Success Services surveys from 2016 and 2018?</li> <li>• How do we develop community within the student experience?</li> <li>• What are reasonable expectations for adult learners?</li> </ul>
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**State the Type(s) of Evidence Gathered**

*To assess the outcome or answer the assessment question, what evidence was collected and is being analyzed?*

1. Results from exit interviews during Oral Exam. Every student mentioned the AGS community.
2. Results from exit interview provided after portfolio review. Almost 60% of students felt a sense of belonging.
3. Results from Student Success Services survey 2016/2018. Specifically, the question with a focus on belonging.

**STEP 2: Analyze Data**

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**As you analyze your data, consider both the guiding questions specific to your goal and the following global questions, then list your conclusions below.**

61. *Is the goal, program, or service **relevant** to institutional effectiveness?*
62. *How much **progress** has been made toward the goal?*
63. *Is this course of action/service/program **effective** in meeting the expected results?*
64. *Is the course of action/service/program the most **efficient** way to achieve the expected results (consider both financial and human resources)?*
65. *What is the **impact** of this course of action/service/program on AGS' ability to accomplish its mission and broad strategic goals?*
66. *Is what we are doing working? Is it working well with our resources?*

1. Yes, the goal is relevant.
2. Development of Student Success Services proposal for new initiatives. The proposal was developed with community, belonging, and encouragement as a foundational element.
3. (and 4.) Efficiency doesn't necessarily align with most effective when considering concepts of belonging. For example, listening with unconditional positive regard leads to students feeling heard and validated, which leads to a sense of belonging.

4. See above
5. If student initiatives are successful, students will feel connected and supported. This connection leads to positive community networking, which could have a positive impact on student enrollment.

### **STEP 3: Identify Opportunities**

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**List potential opportunities for improvement.**

*Choose target area(s) based on 1-5 in analysis.*

6. We could add additional opportunities to hear from students throughout their academic journey. More opportunities to check in with students – informal – walk – in
7. Collaborate with the Director of Assessment to review end of class surveys.
8. Student ID cards – showcases AGS – part of the AGS community.
9. Belonging begins with sincere interconnectedness of staff and faculty. Authentic communication.
10. Belonging is the unspoken feeling people have.
11. Onboarding process for students. Proactively highlighting the value of belonging as students begin their programs.
12. Grad school stress – share with others – creates safety to speak. Faculty training with a focus on mindfulness – be present with students.

### **STEP 4: Action Plan**

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**Summarize the Actual Results**

**In addition to the actual results, were there additional conclusions or discoveries? If so, list.**

The value of good communication. How do you honor students in communication? How do they feel when we really listen attentively?

**Action Plan Steps**

*List possible action steps. Arrange steps into a preliminary plan. Please be specific. Include a timeline and key people as appropriate.*

1. Support group – for AGS students – drop-in for support -possibly in collaboration with Adlerian Students in Action group. Key people include Bre Hivala and Antwan Player.
2. Fish tank – people gather around beauty. Interface with Building and Grounds Committee to consider set-up of space (see #3 below). Fall, 2019.
3. Fish tank room – with couches – lounge- hang out – visit.
4. Space downstairs
5. Consider outside vendor such as Caribou (watering hole concept). Approach Building and Grounds to see if there is any interest in bringing in an outside group to build community around a destination spot in the building.
6. Host a Farmer’s Market – belonging here and within the community – students could have a booth – showcase their talents. Key people: All staff, Art Therapy Program Director-Craig Balfany, Alums. Target Summer 2020.
7. Partner with Hippy Feet – supports homeless (for every pair of socks, a pair goes to a homeless person). Homeless work for them as well. Key people: Members of Social Interest in Action group. Timeline: January, 2020.
8. Timely decisions around school closure – some students drive 2 -3 hours to get to school. Key people: Jeff Allen. Timeline: Immediate.
9. Student IDs. Key people: Laurencio Lechuga (relative to current technology). Fall 2019.
10. Maintain the group – check-in with each other – Maybe in the Fall an invitational email “What have you been thinking since we met?”



**Unanswered questions and open items**

*What are some unanswered questions or open items that need further exploration and/or data?*

1. Who locks the building?
2. Do we have protocol for active shooter? Safety protocol?

## **STEP 5: Report**

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*Reporting the action plan helps to close the feedback loop. Who should know the results of this analysis? How will this be reported?*

Adler students/faculty/staff. Some information may be shared via current newsletter (via Parker Lindo). Leadership team via weekly meetings.

**NEXT**

**Assessment Results & Action Plan**

**Goal 3.3.1**

**MSJCCs are integrated in curriculum by Summer 2019.**

Date Reviewed:	6/21/19
Review Team:	Team leader: Rashida Team members: Letitia, Solange, Jeff

**STEP 1: Collect Data**

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*Circle the Value addressed:    Quality Education    Adlerian Principles    Diversity    Institutional Stability*

<b>Performance Indicator addressed</b>
<i>What performance indicator is being addressed?</i>
Goal 3.3.1: MSJCCs are integrated in curriculum by Summer 2019. Guiding questions: <ul style="list-style-type: none"> <li>• What is the plan to integrate the MSJCCs in our curriculum?</li> <li>• Are their courses already developed with the competencies? What are they?</li> <li>• What courses are being worked on next?</li> <li>• What do we need to do to finish up this task?</li> </ul>
<b>State the Type(s) of Evidence Gathered</b>
<i>To assess the outcome or answer the assessment question, what evidence was collected and is being analyzed?</i>
<ul style="list-style-type: none"> <li>• CACREP 2F2- Social and Cultural Diversity standards</li> <li>• Multicultural and Social Justice Counseling Competencies (MSJCC) framework</li> <li>• Course Syllabus Template</li> </ul>

- Curriculum Map
- Professional Portfolio Template and Rubrics

## STEP 2: Analyze Data

As you analyze your data, consider both the guiding questions specific to your goal and the following global questions, then list your conclusions below.

67. Is the goal, program, or service **relevant** to institutional effectiveness?

68. How much **progress** has been made toward the goal?

69. Is this course of action/service/program **effective** in meeting the expected results?

70. Is the course of action/service/program the most **efficient** way to achieve the expected results (consider both financial and human resources)?

71. What is the **impact** of this course of action/service/program on AGS' ability to accomplish its mission and broad strategic goals?

The review committee assessed this goal as a relevant and vital to institutional effectiveness and sustainability. The incorporation MSJCC's promotes AGS' ability to accomplish its mission by preparing students for effective work with diverse populations. Additionally, the intentional incorporation of MSJCC's allows AGS to improve retention of a diverse student body. Analysis of the demonstrates moderate progress has been made toward this goal.

- Two CACREP 2F2- Social and Cultural Diversity standards are fully mapped at each level throughout the curriculum.
- The Course Syllabus Template reflects a commitment to address MSJCC in each class
- The Professional Portfolio Template and Rubrics reflects the requirement that all students demonstrate competence using the MSJCC framework.
- Committee of faculty developed and MSJCC framework mapped in approximately 1/3 of the curriculum.

### STEP 3: Identify Opportunities

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**List potential opportunities for improvement.**

*Choose target area(s) based on 1-5 in analysis.*

- Intentional use of textbooks that include Multiculturalism, social justice, and/ or advocacy.
- Use of scholarly resources to complement course textbooks.
- Check and enhance the intentional inclusion of MSJCC and advocacy elements in assignments and course discussion forums.
- Increased use of experiential and service learning activities.

### STEP 4: Action Plan

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**Summarize the Actual Results**

During the session committee matched the CACREP 2F2- Social and Cultural Diversity standards with the Multicultural and Social Justice Counseling Competencies (MSJCC) framework.

**In addition to the actual results, were there additional conclusions or discoveries? If so, list.**

**Action Plan Steps**

*List possible action steps. Arrange steps into a preliminary plan. Please be specific. Include a timeline and key people as appropriate.*

- Rashida Fisher will work with preexisting faculty work group to complete mapping of CACREP 2F2- Social and Cultural Diversity standards and Multicultural and Social Justice Counseling Competencies (MSJCC) framework throughout the counseling curriculum. Additional committee member will be identified.
- Course development work groups will work to identify relevant scholarly articles.
- President and program faculty will explore community partnerships to increase opportunities for service learning. Work to increase counseling services/ access to rural and outstate MN.

**Unanswered questions and open items**

*What are some unanswered questions or open items that need further exploration and/or data?*

**STEP 5: Report**

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*Reporting the action plan helps to close the feedback loop. Who should know the results of this analysis? How will this be reported?*

**NEXT**

**Assessment Results & Action Plan**

**Goal 3.4.2**

**Student Success Services integrates, supports and promotes multicultural awareness and diversity.**

Date Reviewed:	6/21/19
Review Team:	Team leader: Meg Whiston Team members: Allison, Rachelle, Michael, Juliana, Evette, Alicia

**STEP 1: Collect Data**

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*Circle the Value addressed:    Quality Education    Adlerian Principles    Diversity    Institutional Stability*

<b>Performance Indicator addressed</b>
<i>What performance indicator is being addressed?</i>
<p>Goal 3.4.2: Student Success Services integrates, supports and promotes multicultural awareness and diversity.</p> <p>Guiding questions:</p> <ul style="list-style-type: none"> <li>• How does Student Success Services integrate, support and promote multicultural awareness and diversity? What is the plan for this?</li> <li>• What programs or support services most speak to our students' needs?</li> <li>• Do we have survey results that we can analyze and make decisions? How many students are utilizing SSS?</li> <li>• Do we have demographic data on these students?</li> <li>• What are we doing well in relation to this goal?</li> <li>• What and how can we improve?</li> </ul>

- How do students perceive our sensitivity to multicultural awareness and diversity in every action we provide?
- How do we move beyond simple programs or workshops to an integrative environment that showcases or weaves this value into every support service we offer?
- How are we viewing multicultural awareness and diversity? Are we looking at the broadest perspective or range?

**State the Type(s) of Evidence Gathered**

*To assess the outcome or answer the assessment question, what evidence was collected and is being analyzed?*

1. Writing Center usage numbers demonstrate support to ESL students.
2. Flash fiction prompts – students are encouraged to respond from a multicultural perspective.
3. Interactive mapping – students indicated where (in the world) they came from or the location of a personally significant experience.
4. Outreach to community partners and organizations (e.g., Guthrie) – encouraging community connection with our students – connections they may not otherwise have had.

**STEP 2: Analyze Data**

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**As you analyze your data, consider both the guiding questions specific to your goal and the following global questions, then list your conclusions below.**

72. *Is the goal, program, or service **relevant** to institutional effectiveness?*
73. *How much **progress** has been made toward the goal?*
74. *Is this course of action/service/program **effective** in meeting the expected results?*
75. *Is the course of action/service/program the most **efficient** way to achieve the expected results (consider both financial and human resources)?*
76. *What is the **impact** of this course of action/service/program on AGS' ability to accomplish its mission and broad strategic goals?*

1. Yes. It is more than relevant. It is a necessity.

2. Progress is subjective; however, emphasis is placed on the value of multicultural understanding, so we can best serve a diverse student body.  
Bathroom signage demonstrates inclusivity, for example. Consider not just what we say, but also nonverbal communication and what we do.
3. Repeat use of services is an indicator of comfort in accessing services – numbers demonstrate this comfort level.
4. We support walk-ins, but we encourage appointments. Appointments are gaining popularity because students know the attention is tailored to their individual needs. Some learning styles thrive with smaller groups or individualized approaches.
5. Preparing mental health and human service professionals with a strong Adlerian foundation to foster encouragement, collaboration, and a sense of belonging to the individuals, families, and culturally diverse communities they serve.
6. Draw students to experiences they may not have otherwise by partnering with community organizations.

### STEP 3: Identify Opportunities

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**List potential opportunities for improvement.**

*Choose target area(s) based on 1-5 in analysis.*

1. Include new questions on the SSS survey.
2. Broaden the perception of multicultural – or diversity (e.g., disabilities, gender, inclusion, etc.)
3. Update bathroom signage – eliminate “uni” - Image more inclusive.
4. How do we recruit new students? Enhance the recruitment efforts. Could there be a satellite office or location for underserved population? Possible partnership to increase presence?  
(Visceral reaction when we hear Minnetonka.) Link between wondering and the actual community of AGS. Demystify AGS.
5. ESL students – Enhance sensitivity and cultural awareness in the classroom. Proactively offer faculty brief summary of cultural differences/language differences when ESL students will be in the classroom



6. How do we address a mistake? The language we use. Professional development opportunities. (Husband or wife vs partner.)
7. Partnerships in social justice – identify resources – list for students – additional internships: A dedicated page on website for resources. Resources within benefit plans (employees).
8. More interactive events (e.g., flash fiction)

## STEP 4: Action Plan

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### Summarize the Actual Results

### In addition to the actual results, were there additional conclusions or discoveries? If so, list.

Greater awareness of services – e.g., 34 current students with active ADA accommodations.  
Excitement about getting AGS back to diverse population through possible partnership.

### Action Plan Steps

*List possible action steps. Arrange steps into a preliminary plan. Please be specific. Include a timeline and key people as appropriate.*

1. Create a web page with community resources. Key people: Meg Whiston, Michael Grohs, Parker Lindo, Laurencio Lechuga. Timeline: Review in October, 2019.
2. Presentations regarding diverse populations. What does it look like to provide therapy in prison....etc. Possible partnership with the Adler Institute? Key people: Ev Haas
3. Reconnect students with ICASSI – international experience – can bring families – bring the value of that program back to students. Not clear on timeline. Must check to see if this would be possible given new programs.

4. Pronouns in signatures – buttons with pronouns. Key people: All staff/faculty. Timeline: Raise this point at next All Staff meeting in July/August, 2019.
5. Offer students the opportunity to form special interest groups as an Independent Study (1 credit) – led by student with one faculty or support member present. The Leadership team could discuss possibilities and key person to review any course offering: Solange Ribeiro. Timeline: 2020.
6. Chalkboard wall – respond to a prompt
7. Maintain the group – check-in with each other – Maybe in the Fall, 2019.

#### Unanswered questions and open items

*What are some unanswered questions or open items that need further exploration and/or data?*

1. What about diversity in the admissions team?
2. Who has time for this? Who takes the lead?
3. How do you prioritize/make the space for new initiatives?

## STEP 5: Report

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*Reporting the action plan helps to close the feedback loop. Who should know the results of this analysis? How will this be reported?*

Progress points can be shared at each Stand-Up meeting (twice monthly) for all staff. Department Check-ins during weekly Leadership Meeting.

NEXT

**Assessment Results & Action Plan**

**Goal 4.1.2**

**AGS will provide relevant continuing education programs for professionals through the Adler Institute.**

Date Reviewed:	6/21/19
Review Team:	Team leader: Ev Team members: Alumni, Marcie, Christina, Parker, Ray, Student 3

**STEP 1: Collect Data**

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*Circle the Value addressed:    Quality Education    Adlerian Principles    Diversity    Institutional Stability*

<b>Performance Indicator addressed</b>
<i>What performance indicator is being addressed?</i>
Goal 4.1.2: AGS will provide relevant continuing education programs for professionals through the Adler Institute.
<p>Guiding questions:</p> <p>The goal is related to Sustainability</p> <ul style="list-style-type: none"> <li>• Who is attending these trainings?</li> <li>• Do we generate a surplus?</li> <li>• Have we increased our Adlerian training offerings to community members and stakeholders? How many trainings do we have per month/year? How do we advertise these trainings to our community members? Is our attendance adequate? Do we need to work on increasing attendance? How might we do this?</li> <li>• Review our social media and website: Are we doing a good job promoting our trainings? Are these engaging posts?</li> <li>• What needs to be improved and how can we improve?</li> </ul>

**State the Type(s) of Evidence Gathered**

*To assess the outcome or answer the assessment question, what evidence was collected and is being analyzed?*

- Gathering more data, Identify and segment an audience and gather again in the fall to analyze the data. How many are repeat customers and how many are new per workshop for the Institute.
- Gathering metrics that are relevant to our goals. Id info and people by events. Seeking out what is relevant for courses. Determining does the institute increase involvement with AGS.
- Same information as goal 2.3.1 because statistics were gathered on all attendees with no further analysis.

**STEP 2: Analyze Data**

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**As you analyze your data, consider both the guiding questions specific to your goal and the following global questions, then list your conclusions below.**

*77. Is the goal, program, or service **relevant** to institutional effectiveness?*

*78. How much **progress** has been made toward the goal?*

*79. Is this course of action/service/program **effective** in meeting the expected results?*

*80. Is the course of action/service/program the most **efficient** way to achieve the expected results (consider both financial and human resources)?*

*81. What is the **impact** of this course of action/service/program on AGS' ability to accomplish its mission and broad strategic goals?*

- Gathering more data, Identify and segment an audience and gather again in the fall to analyze the data. How many are repeat customers and how many are new per workshop for the Institute. This is a process that has just been recognized and will start after this retreat. We need to identify students, alumni, community partners and guests.

- This will allow us to offer more relevant workshops for licensed professions to earn CE's. Also to do more online training by finding out where our customers are.

### STEP 3: Identify Opportunities

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**List potential opportunities for improvement.**

*Choose target area(s) based on 1-5 in analysis.*

- Identify Opportunities – Providing institute and alumni information at AGS promotional tables at different events. Looking at reaching out to communities such as parents or having open houses. Possibly connecting to organizations and offering trainings.
- Introducing Adlerian competencies to a broader audience while still getting approved for CE's from the boards.

### STEP 4: Action Plan

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**Summarize the Actual Results**

- Gathering metrics that are relevant to our goals. Id info and people by events. Seeking out what is relevant for courses. Determining does the institute increase involvement with AGS.

**In addition to the actual results, were there additional conclusions or discoveries? If so, list.**

We are not reaching as many of the Alumni as we should be. More contact and more invitations to meetings, not just workshops. Building stronger relationships.

**Action Plan Steps**

*List possible action steps. Arrange steps into a preliminary plan. Please be specific. Include a timeline and key people as appropriate.*

- Identifying target audience and identify what is relevant to our target audience. (Alumni people in the mental health fields) Possibly having a brochure for the institute for CE credits as well as Alumni information. Providing this by the 50<sup>th</sup> anniversary. Reaching out to non-therapy alumni. ID what the people attending the events want. (What stage are you in? When will need CE's?) Increasing number of programs for an increasing population.
- Plan more Alumni events. Form outstate Chapters and do more online workshops.
- Survey Alumni every 5 years.

**Unanswered questions and open items**

*What are some unanswered questions or open items that need further exploration and/or data?*

How to reach more social media outlets.  
How to increase the list on Constant Contact.

**STEP 5: Report**

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*Reporting the action plan helps to close the feedback loop. Who should know the results of this analysis? How will this be reported?*

The Alumni Board, The school President. Director of Finance to help with a budget.

**NEXT**

**Assessment Results & Action Plan**

**Goal 4.2.1**

**AGS will track enrollment, student persistence, retention, and graduation rates in order to identify areas for improvement.**

Date Reviewed:	6/21/19
Review Team:	Team leader: Debbie Team members: Jeff, Ruth, Jill Sisk, Antwan, Nikki, Student 3

**STEP 1: Collect Data**

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*Circle the Value addressed:    Quality Education    Adlerian Principles    Diversity    Institutional Stability*

<b>Performance Indicator addressed</b>
<i>What performance indicator is being addressed?</i> Institutional Sustainability
<b>Goal 4.2.1: AGS will track enrollment, student persistence, retention, and graduation rates in order to identify areas for improvement.</b>
<p><b>Guiding questions:</b></p> <ul style="list-style-type: none"> <li><b>Are we tracking?</b> Yes, the Registrar collects attrition &amp; persistence data term by term and retention &amp; completion data annually.</li> <li><b>What are the results?</b> Attached are the spreadsheets showing past and current data. Overall, the averages by data element are: Attrition rate average = 11% Persistence average = 90% Retention average = 88%</li> </ul>

Average completion/graduation rate by program:

Adlerian Studies/General Studies: 75%

Art Therapy: 88%

COD: 67%

MFT: 51%

School Counseling: 81%

- **How well are we doing?**

Our definition of fulltime enrollment is 6 or more credits per term; completing 24 credits per academic year. Students average 5.25 credits per term which is below 6 so that can prolong program completion. Our students for the most part are non-traditional students with fulltime jobs and families. They range in age from 21 – 70+. Considering a holistic approach to completion, the length of time it takes a student to complete their program should not be the sole indicator for student success given the out of class responsibilities that our students face. What will positively affect completion going forward is the introduction of 604 Portfolio Defense. Students will have one term to complete their portfolios versus 12 months to complete the Master’s Project.

- **Is our advising supporting persistence, retention, and completion?**

Prior to the 2018 advent of proactive advising, our persistence numbers have remained the same from 2016 through today. Persistence is high at 90% but we can always strive for 100%. As we continue to collect data, over time we will have a better sense of the effect of advising on persistence. Our retention numbers have declined over time. We believe that can be attributed to our 2014-15 commitment to increasing the course and program rigor. It wasn’t until the 2014-15 academic year that we started issuing a failing grade. Prior to that students were given an R (retake) which did not negatively impact the cumulative grade point average. Students were not put on academic probation, suspension or dismissed.

- **What needs to be improved and how can we improve it?**

We believe we are continuously taking steps to improve attrition, persistence, retention and completion. Each student is assigned an advisor who will work with the student proactively to keep the student on their program plan which will keep them enrolled term to term and on track to complete the program within their programs specified timeframe. But only with time will we know if proactive advising will positively affect our data going forward.



**State the Type(s) of Evidence Gathered**

*To assess the outcome or answer the assessment question, what evidence was collected and is being analyzed?*

Run SONIS reports, review and analyze the raw data pertaining to each element. Reviewed data back to 2016 to establish a baseline to evaluate the changes to the data over time. Are we getting better or worse? This is difficult to know for sure due to the programmatic changes. More credits added to a program takes students longer to finish . . . so even though we have “established” a baseline, the baseline has changed for at least one program every year since 2016, as the programs continue to improve. It is even difficult to compare Adler to similar schools because IPEDS data is geared toward students seeking undergraduate degrees. For graduate level IPEDS reporting we are not required to report retention, persistence or graduation rate data so it is impossible to compare our data to similar type institutions. The data just doesn’t exist because it is not required of graduate programs.

**STEP 2: Analyze Data**

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**As you analyze your data, consider both the guiding questions specific to your goal and the following global questions, then list your conclusions below.**

82. *Is the goal, program, or service **relevant** to institutional effectiveness?*

83. *How much **progress** has been made toward the goal?*

84. *Is this course of action/service/program **effective** in meeting the expected results?*

85. *Is the course of action/service/program the most **efficient** way to achieve the expected results (consider both financial and human resources)?*

86. *What is the **impact** of this course of action/service/program on AGS’ ability to accomplish its mission and broad strategic goals?*

1. Yes – making graduation rates available to prospective students is not only a best practice but it is also a requirement under Consumer Information as enacted by the Higher Education Opportunity Act. This measures program quality and student success culminating in graduation.

2. Having the data available indicates to us that what we are doing as an institution is working. It helps us to prepare for programmatic and curriculum changes and with scheduling and advising.
3. Although rudimentary, the data is consistently mined and available for distribution.
4. As our Student Information System improves with each upgrade, we experience more robust reporting. Running reports and performing the calculations is time consuming, perhaps in the future our SIS will do the calculations for us which will cut down on the amount of human resource time that is spent gathering and computing the data.
5. It is difficult to dispute data. Historical data is beneficial when making a case and justifying a position whether pro or con. Having good data available to us will inform future decisions as they pertain to program improvements, attracting students and institutional sustainability. Over the course of time, the historical data will inform decisions for future success.

### STEP 3: Identify Opportunities

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**List potential opportunities for improvement.**

*Choose target area(s) based on 1-5 in analysis.*

Attrition, persistence, retention and completion are all areas that speak directly to student success. Simply creating spreadsheets with numbers is not the most compelling indicator of success. We need to know the “when and why”. A student stops attending – at which point does that occur, is there a pattern, do we know the reason why they have stopped attending? By digging further, we can and should be able to answer these questions. Working collaboratively with advising and by sharing this data across the departments between the registrar and advising we can get at the when and why and have a potentially positive impact on student success.

Another opportunity is to track more closely the Conditional Admits. These are students who were admitted even though they were below the minimum standards required for a full admission. They are given a term of enrollment to achieve grades of a B or better demonstrating their abilities to warrant a full admission. We decided that we were lacking data on this group of students. Anecdotally, we hear that students who struggle academically were conditionally admitted. The only way to support or deny this

assertion is to look at the students who do not persist to see whether they were conditionally admitted or a full admit and whether that is disproportionate.

## STEP 4: Action Plan

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### Summarize the Actual Results

We learned from one another that everyone of us in the group effects attrition, retention, persistence and completion. We agreed that tracking the data is necessary, but we also agreed that as an institution, all faculty and staff should know the definition of each term and how staff and faculty can personally impact a student's success as it pertains to these data elements. We learned that attrition is very low, persistence is high, retention has changed significantly from 2013 and that MFT graduation rates are the lowest compared to the other programs.

We also saw the value in breaking down all the data by program. We briefly discussed whether including students at large would skew the data?

### In addition to the actual results, were there additional conclusions or discoveries? If so, list.

Included in the summary above.

### Action Plan Steps

*List possible action steps. Arrange steps into a preliminary plan. Please be specific. Include a timeline and key people as appropriate.*

1. Continue mining data (Registrar, ongoing)
2. Disseminate data to interested parties and include on the Assessment Page of the website.
3. Create work groups including staff and faculty campus wide to discuss how to improve retention and completion. (Registrar will seek input from Academic Council regarding invitations to work group)

4. Look specifically at the conditional admits in comparison to the full admits pertaining to attrition, persistence, retention and completion. (Work group – will consist of 4.2.1 group members and others as deemed necessary and pertinent)
5. Report data quarterly to Academic Council, Advising and Stand Up meetings. (Registrar and/or work group members)

**Unanswered questions and open items**

*What are some unanswered questions or open items that need further exploration and/or data?*

1. How do students-at-large effect the data? Should they be considered outliers and be excluded from the analysis?
2. At what stage in a program do students tend to withdraw? Does it vary by program? Is there a notable pattern?
3. Do a separate analysis of conditional admits.
4. How does a student taking a break or leave effect completion rate at Adler?

## **STEP 5: Report**

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*Reporting the action plan helps to close the feedback loop. Who should know the results of this analysis? How will this be reported?*

Data will be shared with Academic Council and an electronic copy of this report will be shared with the 4.2.1 group members as we continue to develop future work groups. See action steps above.

**NEXT**

## Assessment Results & Action Plan

### Goal 4.2.2

**Number of new students increases by 5% each year for the next three years.**

Date Reviewed:	6/21/19
Review Team:	Team leader: Christina Team members; Parker, Marcie, Jill P.

### STEP 1: Collect Data

*Circle the Value addressed:*    **Quality Education**    **Adlerian Principles**    **Diversity**    **Institutional Stability**

<p><b>Performance Indicator addressed</b> <i>What performance indicator is being addressed?</i></p> <p>Goal 4.2.2: Number of new students increases by 5% each year for the next three years.</p> <p>Guiding questions:</p> <ul style="list-style-type: none"> <li>• What are the results of 2018/19?</li> <li>• Are we on track to meet our goals from the present to 2021?</li> <li>• Is the recruitment plan adequate to meet goal? If yes what makes it effective? If not, why and what is needed?</li> </ul>
<p><b>State the Type(s) of Evidence Gathered</b> <i>To assess the outcome or answer the assessment question, what evidence was collected and is being analyzed?</i></p> <p>New student enrollment numbers are collected and analyzed by the director of admissions using SONIS, Izenda, and Excel tools. Funnel data (prospects, admits, enrollments) was collected starting in November 2017 when the director of admissions came on board. Results for the 2018/2019 school year showed that new student enrollment had increased 16% over 2017/2018.</p>

## STEP 2: Analyze Data

As you analyze your data, consider both the guiding questions specific to your goal and the following global questions, then list your conclusions below.

87. Is the goal, program, or service **relevant** to institutional effectiveness?

88. How much **progress** has been made toward the goal?

89. Is this course of action/service/program **effective** in meeting the expected results?

90. Is the course of action/service/program the most **efficient** way to achieve the expected results (consider both financial and human resources)?

91. What is the **impact** of this course of action/service/program on AGS' ability to accomplish its mission and broad strategic goals?

1. The goal of increasing enrollment by 5% each year for the next three years is relevant to institutional effectiveness because more new students equals more revenue.
2. Progress towards the goal has been extensive with a 16% increase in 2018/19 over 2017/18, but this continues to be a growth area as enrollment numbers in master's level programs are dropping nationally. The admissions and student services departments continue to improve the process for newly admitted students to make it more efficient while also keeping the student experience in mind. Customer service across departments has been key, and eventually leads to referrals for new students from current students happy with their experience. Staff changes (adding an assistant director and increasing the marketing specialist and admissions coordinator to full-time) have allowed AGS to work with additional prospects and try new recruitment methods while retaining the personal attention AGS is known for. Additionally, the admissions department is adding a new Customer Relationship Manager (CRM) software solution in 2019/20 to allow the team to work with more prospective students without increasing staffing levels. The CRM will also provide a more modern inquiry, admission, and matriculation experience that will help AGS compete with other schools, leading to more matriculated students.
3. To date the changes made in the admissions process has led to success in meeting expected goals. The additional staff has given the director of admissions more time to analyze data, recruit externally, and investigate new tools such as the CRM.
4. We continue to work on improving efficiencies. The SONIS student information system is a valuable tool for many departments at AGS, but is not the efficient for recruiting and admissions because it takes too long to create work-arounds

for simple tasks like operating an automatic communication plan or printing personalized admission letters. The addition of the new CRM (Element451), approved June 2019, will help tremendously.

5. Meeting the goal of a 5% increase each year over three years will promote institutional financial stability.

### **STEP 3: Identify Opportunities**

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**List potential opportunities for improvement.**

*Choose target area(s) based on 1-5 in analysis.*

1. Tapping into alumni and actively getting referrals, versus passively searching for referrals.
2. Recruiting a more diverse student body will lead to a better student experience.
3. Orientation can be improved to make sure students have clear expectations.
4. The admissions team needs to be kept abreast of changes (curriculum, cost, fees, etc.) that are being implemented.

### **STEP 4: Action Plan**

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**Summarize the Actual Results**

After a decrease in students from 16-17, we have started increase new student enrollments. Capabilities for capturing and analyzing funnel and enrollment data have improved.

**In addition to the actual results, were there additional conclusions or discoveries? If so, list.**

None. Quantitative results are very straightforward.

**Action Plan Steps**

*List possible action steps. Arrange steps into a preliminary plan. Please be specific. Include a timeline and key people as appropriate.*

Referral building:

By August 23, 2019, the director of admissions will build a recruitment plan to target attendees of the 50<sup>th</sup> anniversary.

By November 2019, the admission team will

- start building a marketing plan for the Adler Institute that “soft-sells” our degree programs.
- add a section to the newsletter to market returning to programs.
- Build an admissions communication plan that goes out to alumni and inactive students, old leads.

Admissions team will build a communication plan for admitted students who apply long before the start date. This will be part of the CRM build-out and should be completed by September 30, 2019.

Admissions team will work with alumni director and program chairs to capture metrics on employment/placement for graduates, licensure pass rates – data that will assist with marketing efforts. December 2019.

**Unanswered questions and open items**

*What are some unanswered questions or open items that need further exploration and/or data?*

We need more in-depth reports on prospect sources, and a more accurate funnel report (will be solved by new CRM).

Is there data in the clearinghouse that we could be using for better information about which schools students who don’t matriculate are choosing?

We need more information specific to when students are admitted and the likelihood of them starting school. Director of admissions will pull this data and this group will reconvene in August to discuss.

**STEP 5: Report**

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*Reporting the action plan helps to close the feedback loop. Who should know the results of this analysis? How will this be reported?*

Admissions provides weekly updates at the campus leadership meeting and as-needed during the all-staff stand up meetings. This group will reconvene in August to review numbers as they relate to deadlines.

**NEXT**

**Assessment Results & Action Plan**

**Goal 4.2.3**

**Student Success Services provides a diversified menu of support services that meet the needs of students.**

Date Reviewed:	6/21/19
Review Team:	Team leader: Meg Whiston Team members: Rachelle, Ruth, Michael, Amy, Asha, Nikki, Bobby and student 4

**STEP 1: Collect Data**

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*Circle the Value addressed:    Quality Education    Adlerian Principles    Diversity    Institutional Stability*

<b>Performance Indicator addressed</b>
<i>What performance indicator is being addressed?</i>
<p>Goal 4.2.3: Student Success Services provides a diversified menu of support services that meet the needs of students.</p> <p>Guiding questions:</p> <ul style="list-style-type: none"> <li>• What support services are currently offered by Student Success Services?</li> <li>• How much do students use these services? What do we do to inform students of services available? Are these methods effective? What parts of this strategy can be improved and how?</li> <li>• Are these services the most effective use of our resources? Do we know how well students’ needs are being met? How do we know it?</li> <li>• What are the areas for improvement and how can we improve?</li> <li>• Do we want to graduate students with writing proficiency to assure greater capacity for employability and written communication?</li> <li>• How do we serve online students with equivalency to the support given on-ground?</li> </ul>

**State the Type(s) of Evidence Gathered**

*To assess the outcome or answer the assessment question, what evidence was collected and is being analyzed?*

Results from the Student Success Services Surveys given in 2016 and 2018. Results from the Alumni Survey-2016.  
 Data from total number of students receiving ADA accommodations.  
 Results from Career Services survey (given to those who accessed Career Services 2017-18).  
 Writing Center Data regarding total numbers of students using the Writing Center (by month/year-2016 to present). This includes a ranking of requested/used services via the Writing Center.

**STEP 2: Analyze Data**

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**As you analyze your data, consider both the guiding questions specific to your goal and the following global questions, then list your conclusions below.**

- 92. *Is the goal, program, or service **relevant** to institutional effectiveness?*
- 93. *How much **progress** has been made toward the goal?*
- 94. *Is this course of action/service/program **effective** in meeting the expected results?*
- 95. *Is the course of action/service/program the most **efficient** way to achieve the expected results (consider both financial and human resources)?*
- 96. *What is the **impact** of this course of action/service/program on AGS' ability to accomplish its mission and broad strategic goals?*

- 1. Student Success Services is designed to serve all students, not simply those who express a need. By providing support, we help assure retention and enhance those who succeed and finish programs.
- 2. Student Success Services maximizes on every staff hour to meet the needs of students. With the coming fiscal year, we have enhanced hours in the department. This will play a major role in delivering support and developing new initiatives (see Student Success Services Proposal).

3. Our data is an indicator of effectiveness and we clearly are serving more and more students. This is evidenced by our usage numbers.
4. Given the hours that have been available for support, we have been very efficient. We have experimented with moving hours of service to better meet the needs of all students, including on-line access.
5. The Student Success Services Proposal outlines new initiatives, and each is in direct alignment with the Adler mission and broader strategic goals. This is an evolving process, so we are mindful as we continue to gather and interpret the data. We seek to remain flexible, so we are able to alter course to meet the changing needs of students.

### STEP 3: Identify Opportunities

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**List potential opportunities for improvement.**

*Choose target area(s) based on 1-5 in analysis.*

Potential opportunities (instead of just improve current services)

1. Career opportunities -obtain professionals to come to internship classes – resume and interview help - applications
2. Professional Counseling for students – sliding fee – list of Adlerian therapists in the community.
3. Students want career support as alumni.
4. Website page – in-depth summary of services. Aesthetically pleasing. (Beauty matters.)
5. Modify the term Student Success Services so the Writing Center falls under that umbrella as one of many services.
6. Alter perception by what we call ourselves. Re-brand and consider: Student Encouragement and Support
7. Students care about self-care. If talk about self-care (e.g., in intro course) talk about support at AGS and what is available.
8. “Student Encourager”/ Support Services Ambassador – check in once per term in classes.
9. Student support sessions – students can come and talk - just sit down and talk and leave – Self-care sessions
10. Self-directed self-care tool launch of Nexus.
11. Comfort animals on campus during stressful periods?
12. Nurturance in a cup – seeds in soil. Little bags of care we could hand out to students in need.
13. Goody-bag self-care essentials?
14. Support staff more connected with academics, so we know how best to offer support.

- 15. Work with faculty for greater connection regarding assignment requirements, rubrics
- 16. Webinars (e.g., Career topics, writing topics, ADA topics, APA, Self-Care)
- 17. Licensure Exams – support in preparation for the licensure exams.
- 18. Career Specialists – offer support for LinkedIn – connections with professionals in the community via our Career Specialist.
- 19. Increased online access to Student Success Services

## STEP 4: Action Plan

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### Summarize the Actual Results

In addition to the actual results, were there additional conclusions or discoveries? If so, list.

### Action Plan Steps

*List possible action steps. Arrange steps into a preliminary plan. Please be specific. Include a timeline and key people as appropriate.*

1. Self-care. Self-care. Self-care. Launch online meditation program: Nexus by August, 2019. Key people: Meg Whiston and Laurencio Lechuga.
2. Increase online support services. Identify best approaches in weekly Student Success Services meetings. Make more online services available by October, 2019. Key people: Ruth Schultz, Rachelle Reinisch, Michael Grohs, Parker Lindo, Meg Whiston.
3. Webinars – Monthly series. Identify topics via Student Success Services group and offer first Webinar: November, 2019. Key people (Student Success Services team).
4. Practice test-taking – study prep “how to” licensure prep. Key person: Rachelle Reinisch. Timeline determined based on licensure schedule. Likely an offering in Fall, 2019.
5. Online tutorials that can be available 24/7. Key people: Michael Grohs, Laurencio Lechuga.

6. Meet with Program Chair and/or advisor regarding resume template – and top interview questions – practice interviews (sharing resources). Invite Program Chairs into Student Success Services meetings to share information.
7. Connections with professional organizations to forge a meaningful link after graduation - relative to emphasis area.
8. Follow – up with conditional admits. Key people: Student Success Services team/Advisors of Conditional Admits. Ongoing timeline as Conditional Admits are known.
9. SSS Representative participate in select Advising Group meeting in order to have a greater understanding of what to support.

**Unanswered questions and open items**

*What are some unanswered questions or open items that need further exploration and/or data?*

Given enhanced work hours coming in July, we need to explore how best to connect work hours to these initiatives.

**STEP 5: Report**

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*Reporting the action plan helps to close the feedback loop. Who should know the results of this analysis? How will this be reported?*

Updates on progress will be shared with the Leadership Team (weekly) and the all-staff Stand Up Meetings, as applicable. Information and progress may also be shared via the online newsletter (Parker Lindo initiative).

**NEXT**

**Assessment Results & Action Plan**

**Goal 4.3.1**

**Data from institutional assessment plans are used to inform decisions about resource management.**

Date Reviewed:	6/21/19
Review Team:	Team leader: Kathy Team members: Jeanette, Laurencio, Ray, Solange

**STEP 1: Collect Data**

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*Circle the Value addressed:    Quality Education    Adlerian Principles    Diversity    Institutional Stability*

<b>Performance Indicator addressed</b> <i>What performance indicator is being addressed?</i>
Goal 4.3.1: Data from institutional assessment plans are used to inform decisions about resource management.  <u>Guiding questions:</u> <ul style="list-style-type: none"> <li>• What are the results for the 4 Start Change?</li> <li>• Have we been evaluating the results? What is the organizational structure and is it designed to meet the needs to grow? How do we know this?</li> <li>• Are the Admissions results going out quarterly? What is the procedure for sustainability of this process? Is there a manual of procedures? How is it working? How is the dashboard being used to inform decisions?</li> <li>• What are the results of the Dashboard? Are the Board and Leadership Team making decision based on the results?</li> </ul>

**State the Type(s) of Evidence Gathered**

*To assess the outcome or answer the assessment question, what evidence was collected and is being analyzed?*

- Enrollment Trends & Projections from Fall 2017 through Spring 2020
- Total and Projected Revenue & Expenses from FY16 through FY20
- Projected Increase in Total Revenue with Projected Increase in Enrollment for FY21 through FY23

**STEP 2: Analyze Data**

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**As you analyze your data, consider both the guiding questions specific to your goal and the following global questions, then list your conclusions below.**

- 97. *Is the goal, program, or service **relevant** to institutional effectiveness?*
- 98. *How much **progress** has been made toward the goal?*
- 99. *Is this course of action/service/program **effective** in meeting the expected results?*
- 100. *Is the course of action/service/program the most **efficient** way to achieve the expected results (consider both financial and human resources)?*
- 101. *What is the **impact** of this course of action/service/program on AGS' ability to accomplish its mission and broad strategic goals?*

- At a projected growth rate of 5% per year in new student enrollment, we will not reach financial equilibrium until 2022-23.
- Total Revenue and Net Tuition/Fees have been steadily increasing. However, we are still heavily dependent on tuition, with 97% of our total revenue coming from tuition and fees.
- Approximately 75% of our total expenses are personnel expenses. Personnel expenses have been steadily increasing, while non-personnel expenses are relatively stable.

**STEP 3: Identify Opportunities**

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**List potential opportunities for improvement.**

*Choose target area(s) based on 1-5 in analysis.*

- Implement CRM system to improve prospective student engagement
- Determine how implementation of new systems (i.e. CRM system) will impact human resources
- Fundraising – Develop and implement a fundraising plan; Ensure resources for implementation, monitoring, and evaluation
- Service Center Revenue – Expand or re-establish Service Center activity (i.e. School Counseling, Art Therapy, COD)
- Expand Workshop/Continuing Education offerings – Develop and implement a plan for determining workshop/continuing education offerings, including a needs assessment and evaluations
- Taking our strategic initiatives (i.e. CACREP accreditation, student success, Moodle upgrade, technology and cybersecurity upgrades, operational system upgrades) into account: Develop and implement a plan for hiring new faculty and staff; Develop and implement a plan for systematic capital asset repair and replacement, technology and cybersecurity upgrades, and operational system upgrades.

**STEP 4: Action Plan**

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**Summarize the Actual Results**

- Moving from 8 to 4 starts per year did not have a negative impact on student enrollment and had a significant positive impact on the use of human resources
- Admissions effectiveness is limited by the human resources that are available, which is expected to improve with the implementation of the new CRM system.
- The dashboard is not having a significant impact on decisions made by the Leadership Team or the Board. This may be due to the limited information that is provided in the dashboard.

**In addition to the actual results, were there additional conclusions or discoveries? If so, list.**

**Action Plan Steps**

*List possible action steps. Arrange steps into a preliminary plan. Please be specific. Include a timeline and key people as appropriate.*

- Share financial information with the Leadership Team to use as context when making decisions.
- Consider hiring a professional development director to be responsible for a comprehensive fundraising plan. This person would identify opportunities for community outreach, public relations, annual fundraising campaigns, etc.

**Unanswered questions and open items**

*What are some unanswered questions or open items that need further exploration and/or data?*

**STEP 5: Report**

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*Reporting the action plan helps to close the feedback loop. Who should know the results of this analysis? How will this be reported?*

Leadership Team

**NEXT**

**Assessment Results & Action Plan**

**Goal 4.3.2**

**ROI on each marketing and recruiting initiative is conducted.**

Date Reviewed:	6/21/2019
Review Team:	Team leader: Christina Team members: Parker, Marcie, Jill P.

**STEP 1: Collect Data**

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*Circle the Value addressed:    Quality Education    Adlerian Principles    Diversity    Institutional Stability*

<b>Performance Indicator addressed</b>
<i>What performance indicator is being addressed?</i>
Goal 4.3.2: ROI on each marketing and recruiting initiative is conducted.
Guiding questions: <ul style="list-style-type: none"> <li>• What is the Marketing Plan?</li> <li>• Is it effective? Will we achieve goals?</li> <li>• What is the metric to achieve success?</li> <li>• What resources do we currently have and what do we need?</li> <li>• How are we going to improve?</li> </ul>
<b>State the Type(s) of Evidence Gathered</b>
<i>To assess the outcome or answer the assessment question, what evidence was collected and is being analyzed?</i>
The director of admissions pulls SONIS/Izenda reports on prospect source. This data is a little unreliable because of limitations in SONIS, but it gives a relatively accurate idea for decision-making purposes.

## STEP 2: Analyze Data

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As you analyze your data, consider both the guiding questions specific to your goal and the following global questions, then list your conclusions below.

102. *Is the goal, program, or service **relevant** to institutional effectiveness?*
103. *How much **progress** has been made toward the goal?*
104. *Is this course of action/service/program **effective** in meeting the expected results?*
105. *Is the course of action/service/program the most **efficient** way to achieve the expected results (consider both financial and human resources)?*
106. *What is the **impact** of this course of action/service/program on AGS' ability to accomplish its mission and broad strategic goals?*

1. Yes, better ROI = more money to spend on additional recruitment efforts.
2. There has been quite a lot of progress made toward the goal of improving ROI. In 2018 we hired a full-time marketing and communications specialist who is certified in Google analytics, and his expertise allows us to make better spending decisions. Our reporting has also improved as the director of admissions' knowledge of Izenda has increased. Results of our prospect source reports show that we are enrolling our prospects from all sources at high rates (often above industry averages); we just need MORE prospects in order to increase enrollments.
3. Somewhat – there was some miscommunication about allowed budget in 2018/2019 which led to underspending. This has been sorted out for 2019/20.
4. Efficiency is important because of our rather limited budget. Admissions and marketing is being very careful about spending decisions and trying to make decisions based on past data. Occasionally spending opportunities are brought to the team that are outside of the plan and efforts need to be made to ensure that everyone on campus supports the idea that it is best to keep within the established marketing plan rather than attempt every new idea that arises. Efforts should be made to establish a section of the budget for unplanned marketing opportunities that are all evaluated the same way (considerations for timeline, ROI, mission driven, etc).
5. Impact – better spending decisions so we are getting more matriculated students from the sources we are spending on

### STEP 3: Identify Opportunities

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**List potential opportunities for improvement.**

*Choose target area(s) based on 1-5 in analysis.*

Better tracking of source, which is tough in SONIS

Landing page tracking

Consistent evaluation of spending opportunities that are not already in the marketing plan.

Having enough resources to try new things without stealing from our proven methods. More risk taking but without stealing from the proven methods.

### STEP 4: Action Plan

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**Summarize the Actual Results**

The admissions and marketing team continues to fine-tune return on investment. The ROI for current activities is mostly equal to or exceeds industry averages, so the challenge will be to maintain those conversion rates while increasing lead generation. The new Client Relationship Management tool that will be implemented by October 2019 will allow us to pull accurate reports and make smarter decisions about our marketing and recruitment investments.

**In addition to the actual results, were there additional conclusions or discoveries? If so, list.**

We need a new CRM. (After this assessment the CRM purchase was approved by the board of directors).

**Action Plan Steps**

*List possible action steps. Arrange steps into a preliminary plan. Please be specific. Include a timeline and key people as appropriate.*

Marketing specialist is working on a branding effort across all channels, so messages are consistent from ads, newsletters, landing pages, emails, etc. This will first be analyzed in October 2019 with on-going adjustments.

Roll out of the new CRM will occur by October 2019, at that time more robust ROI reports can be generated by director of admissions.

Analysis of each incoming class’s referral sources will inform future marketing decisions (July & October 2019, January and April 2020) – director of admissions and marketing specialist will create and distribute a marketing survey via email.

**Unanswered questions and open items**

*What are some unanswered questions or open items that need further exploration and/or data?*

As we increase our marketing budget and add the new CRM in 19-20, we need more data.

**STEP 5: Report**

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*Reporting the action plan helps to close the feedback loop. Who should know the results of this analysis? How will this be reported?*

Director of admissions and marketing specialist will create reports in Izenda and the new CRM and distribute to the admissions team on a weekly basis. Director of admissions will report to the campus leadership team and board of directors occasionally throughout the year.

**NEXT**

**Assessment Results & Action Plan**

**Goal 4.3.3**

**Development of fundraising plan with sufficient resources for implementation, monitoring, evaluation, and modification.**

Date Reviewed:	6/21/19
Review Team:	Team leader: Rich Team members: Collins, John, Suz

**STEP 1: Collect Data**

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*Circle the Value addressed:*    **Quality Education**    **Adlerian Principles**    **Diversity**    **Institutional Stability**

<b>Performance Indicator addressed</b>
<i>What performance indicator is being addressed?</i>
Goal 4.3.3: Development of fundraising plan with sufficient resources for implementation, monitoring, evaluation, and modification.
<u>Guiding questions:</u>
<ul style="list-style-type: none"> <li>• Do we have a plan? <b>Yes; it is qualitative, and needs more deadlines and definition. However, there is common agreement and consensus that we need a Director of Development, and we need to act on this need immediately.</b></li> <li>• If yes, what is the plan? If not, when and how are we going to develop this plan? <b>We are going to use our current knowledge of our target markets, and perform a SWOT (Strengths, Weaknesses, Opportunities and Threats) Analysis and market analysis, to determine what our hiring and fund-raising priorities should be. We will generate and review additional research material and resources as necessary, to supplement or add to the information that is already available within the institution. We will utilize a committee structure, comprised of key stakeholders, to have input on the planning and analysis of SWOT. We hope to have the SWOT Analysis completed during the Fall Semester. The SWOT Analysis will assist the institution in setting up the criteria for hiring the Director of Development.</b></li> </ul>

- What is needed to implement the plan? **A committee consisting of institutional stakeholders is necessary. It will be proposed that the Committee consist of a faculty member, a current student, a member of the Adler Graduate School staff, an Adler alumna or alumnus and, possibly, a member of the counseling community who may or may not be a graduate of Adler Graduate School.**
- What is the timetable for plan implementations? **We hope to have this Committee formed as soon as possible, so that we can recruit and hire a Director of Development as soon as possible.**
- When and how will we evaluate progress and whether the plan needs to be adjusted? **Progress will be determined by whether or not we are in a position to hire a competent and knowledgeable Director of Development by the end of the calendar year 2019.**

**State the Type(s) of Evidence Gathered**

*To assess the outcome or answer the assessment question, what evidence was collected and is being analyzed?*

We discussed the idea of hiring a Director of Development at the campus-wide Retreat. Three members of the Board of Directors and the Retreat's Facilitator met in a small group. We discussed the dependence of the institution on net tuition revenue, and the sometimes precarious position that the tuition dependence places on the institution. We also discussed how the institution needs to build for the future, especially since the school has now moved into a new building with more resource and classroom space. Finally, the Admissions Office has increased its staffing levels and enhanced its marketing expertise. These factors have placed the institution in a position to grow in terms of student enrollment and academic reputation.

We assessed the percentage of our revenue that is generated by tuition, relative to other revenue-generating sources.

We will also perform a SWOT Analysis and an ongoing market analysis, to determine the current and potential needs of the institution, the students and prospective donors. These analyses will help to inform the institution's leadership to determine the funding priorities.



## STEP 2: Analyze Data

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As you analyze your data, consider both the guiding questions specific to your goal and the following global questions, then list your conclusions below.

- 107. *Is the goal, program, or service **relevant** to institutional effectiveness?*
- 108. *How much **progress** has been made toward the goal?*
- 109. *Is this course of action/service/program **effective** in meeting the expected results?*
- 110. *Is the course of action/service/program the most **efficient** way to achieve the expected results (consider both financial and human resources)?*
- 111. *What is the **impact** of this course of action/service/program on AGS' ability to accomplish its mission and broad strategic goals?*

The work of a Director of Development will have a direct impact on the long-term financial sustainability of the Adler Graduate School. There is momentum of agreement, among the members of the Board of Directors and within the institutional community, that there is a need for a Director of Development who can focus professional, informed and prioritized attention on fundraising. By allowing various stakeholders to provide input on the SWOT Analysis and the subsequent search for a Director of Development, we will allow those groups to gain ownership for the process as well as the outcome. This will, in turn, provide motivation to have a successful search for a Director of Development, as well as provide a foundation for future successful fundraising activities.

## STEP 3: Identify Opportunities

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List potential opportunities for improvement.

*Choose target area(s) based on 1-5 in analysis.*

The SWOT Analysis will allow the institution to do the following:

1. Assess the institution's development capacity.
2. Assess the institution's brand awareness.

3. Assess whether or not the institution has the necessary infrastructure to support a fund-raising effort. This infrastructure includes technology and human resources.
4. Develop its “30-second elevator pitch.” (What do we do best? Focus on our Adlerian knitting.)
5. Determine the respective roles of the institution’s leadership in its fundraising efforts.
6. Assess the needs of the students and graduates.
7. Assess institutional strengths and weaknesses, while informing the fundraising priorities.

## STEP 4: Action Plan

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### Summarize the Actual Results

1. Begin the process of planning and selecting a committee to perform the SWOT Analysis and market analysis.
2. Consult with various groups of stakeholders about the skill sets necessary to be an effective fundraiser for the institution. Focus on what we need to build a future, not “a better yesterday.”

**In addition to the actual results, were there additional conclusions or discoveries? If so, list.**

**Action Plan Steps**

*List possible action steps. Arrange steps into a preliminary plan. Please be specific. Include a timeline and key people as appropriate.*

1. Put together a SWOT Committee. Have representatives from Faculty, students, staff, alumni, and the counseling community as members of the Committee. Complete this by the end of August, 2019.
2. Make sure that the President and the Board of Directors have time to fully consider the proposed charge, activities and work of the SWOT Committee.

**Unanswered questions and open items**

*What are some unanswered questions or open items that need further exploration and/or data?*

1. **Will the formulation of the Committee be obscured by the daily operational needs of the institution? (Time limitations....)**
2. **Are Faculty members, students or staff too busy to serve on another Committee? (Time limitations....)**
3. **Are we trying to answer questions that have already been asked and answered?**

**STEP 5: Report**

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*Reporting the action plan helps to close the feedback loop. Who should know the results of this analysis? How will this be reported?*

1. **Reporting of the SWOT Analysis should be seen by the President and the Board of Directors.**
2. **The Board of Directors and the president should consider sharing the results of the analysis with the entire Adler Graduate School community.**

**NEXT**

**Assessment Results & Action Plan**

**Goal 4.3.4**

**Tuition procedures and processes are in place to prevent bad debt.**

Date Reviewed:	6/21/19
Review Team:	Team leader: Kathy Team members: Jeanette, Laurencio, Ray, Solange

**STEP 1: Collect Data**

*Circle the Value addressed:    Quality Education    Adlerian Principles    Diversity    Institutional Stability*

<b>Performance Indicator addressed</b>
<i>What performance indicator is being addressed?</i>
Goal 4.3.4: Tuition procedures and processes are in place to prevent bad debt.
<u>Guiding questions:</u>
<ul style="list-style-type: none"> <li>• Is there a plan that is consistent with higher education best practices?</li> <li>• What is it?</li> <li>• Has it been reviewed for effectiveness? What are the results?</li> <li>• What is working well?</li> <li>• What can be improved and how can we improve it?</li> </ul>
<b>State the Type(s) of Evidence Gathered</b>
<i>To assess the outcome or answer the assessment question, what evidence was collected and is being analyzed?</i>
<ul style="list-style-type: none"> <li>• Student Account Aging</li> <li>• Bad Debt Analysis</li> </ul>

## STEP 2: Analyze Data

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As you analyze your data, consider both the guiding questions specific to your goal and the following global questions, then list your conclusions below.

- Is the goal, program, or service **relevant** to institutional effectiveness?
- How much **progress** has been made toward the goal?
- Is this course of action/service/program **effective** in meeting the expected results?
- Is the course of action/service/program the most **efficient** way to achieve the expected results (consider both financial and human resources)?
- What is the **impact** of this course of action/service/program on AGS' ability to accomplish its mission and broad strategic goals?

Procedures and processes for timely tuition billing and payment are in place and are being monitored and discussed on a regular basis by the Student Financial Services Committee.

## STEP 3: Identify Opportunities

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List potential opportunities for improvement.

Choose target area(s) based on 1-5 in analysis.

For 2019-20, a small increase in bad debt expense is being forecast due to a small projected increase in tuition revenue. Recovery of bad debt projections have decreased due to the collection of old (2+ years) student accounts that occurred in 2018-19. Overall, projections call for a recovery rate of 75% of accounts that are placed in collection, resulting in net bad debt expense of only \$5,000 (or 0.125%) for 2019-20.

## STEP 4: Action Plan

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<b>Summarize the Actual Results</b>
<ul style="list-style-type: none"> <li>• Due to the intricacies of our Student Information System (SONIS), students often do not receive an accurate picture of what they owe until the first day of the term.</li> <li>• The process for preventing bad debt includes: Discussing tuition billing and payment policies and providing contact information at new student orientation; Sending a packet of information relating to tuition billing and payment policies and contact information, along with a printed copy of their bill, to new students; All students are sent an email encouraging them to view their account in SONIS after registering, making any changes to their registration, and on a monthly basis; Students are contacted by email and/or phone when their accounts become past due; Students who do not complete their financial aid documents in a timely manner are contacted; registration holds are placed on accounts that have a balance greater than the equivalent of one credit of tuition.</li> </ul>
<b>In addition to the actual results, were there additional conclusions or discoveries? If so, list.</b>
<b>Action Plan Steps</b>
<i>List possible action steps. Arrange steps into a preliminary plan. Please be specific. Include a timeline and key people as appropriate.</i>
Manual updating is required for student accounts to be accurate after students register or make changes to their registration. This issue may be resolved when we upgrade to the most recent version of SONIS, which is scheduled to occur the week of June 24 – 28.
<b>Unanswered questions and open items</b>
<i>What are some unanswered questions or open items that need further exploration and/or data?</i>

## STEP 5: Report

<i>Reporting the action plan helps to close the feedback loop. Who should know the results of this analysis? How will this be reported?</i>
Student Financial Services Committee