

This guide is designed to support administrators who are overseeing goal planning and assessment activities.

3-YEAR CYCLE EXPLAINED

Administrative units follow a three-year planning and assessment cycle.

- **Year 1:** Units reflect on their current status, set goals, and begin initial activities and data collection efforts.
- **Years 2-3:** Continue implementing interventions, collecting data and evaluating progress towards identified goals.
- **End of Year 3:** The cycle concludes with a comprehensive review, after which the unit restarts the process of reflecting, planning, implementing, and assessing.

| Administrative Assessment 3-Year Cycle Activities | | |
|---|--|---|
| AY26-27: Year 1 of 3 | | |
| START OF THE YEAR | DURING THE YEAR | END OF THE YEAR |
| <ul style="list-style-type: none"> - Ensure the reflection form for the 3-yr cycle is complete - Ensure the goal setting form for the 3-yr cycle is complete - Identify the following items to be assessed in this AY's cycle: <ul style="list-style-type: none"> - Goals and their alignment with strategic plan - Supporting objectives for each goal <ul style="list-style-type: none"> - Activities - Responsible Party(ies) - Timeline - Measurement of success | <ul style="list-style-type: none"> - Implement any interventions aligned with this AY's cycle - Develop process(es) and collect relevant assessment data - Adjust intervention(s) as needed - Refer to the unit's goal setting form, and determine budgetary needs for the next academic year - Prepare written justifications for any requests for the upcoming budget cycle (if needed) | <ul style="list-style-type: none"> - Reflect on completed activities and analyze any data collected - For each objective, write a summary outlining any accomplishments and determine if it was achieved - Review all progress and determine if any goals were met - Determine if goals need to be extended or adjusted in the plan - Upload all data collection documentation to Teams - Complete all required fields within the Planning Module in Xitracs - Provide updates to leadership/stakeholders as outlined in the cycle's plan |
| AY27-28: Year 2 of 3 | | |
| START OF THE YEAR | DURING THE YEAR | END OF THE YEAR |
| <ul style="list-style-type: none"> - Identify the following items to be assessed in this AY's cycle: <ul style="list-style-type: none"> - Goals and their alignment with strategic plan - Supporting objectives for each goal <ul style="list-style-type: none"> - Activities - Responsible Party(ies) - Timeline - Measurement of success | <ul style="list-style-type: none"> - Implement any interventions aligned with this AY's cycle - Develop process(es) and collect relevant assessment data - Adjust intervention(s) as needed - Refer to the unit's goal setting form, and determine budgetary needs for the next academic year - Prepare written justifications for any requests for the upcoming budget cycle (if needed) | <ul style="list-style-type: none"> - Reflect on completed activities and analyze any data collected - For each objective, write a summary outlining any accomplishments and determine if it was achieved - Review all progress and determine if any goals were met - Determine if goals need to be extended or adjusted in the plan - Upload all data collection documentation to Teams - Complete all required fields within the Planning Module in Xitracs - Provide updates to leadership/stakeholders as outlined in the cycle's plan |
| AY28-29: Year 3 of 3 | | |
| START OF THE YEAR | DURING THE YEAR | END OF THE YEAR |
| <ul style="list-style-type: none"> - Identify the following items to be assessed in this AY's cycle: <ul style="list-style-type: none"> - Goals and their alignment with strategic plan - Supporting objectives for each goal <ul style="list-style-type: none"> - Activities - Responsible Party(ies) - Timeline - Measurement of success | <ul style="list-style-type: none"> - Implement any interventions aligned with this AY's cycle - Develop process(es) and collect relevant assessment data - Adjust intervention(s) as needed - Refer to the unit's goal setting form, and determine budgetary needs for the next academic year - Prepare written justifications for any requests for the upcoming budget cycle (if needed) | <ul style="list-style-type: none"> - Reflect on completed activities and analyze any data collected - For each objective, write a summary outlining any accomplishments and determine if it was achieved - Review all progress and determine if any goals were met; provide recommendations for areas of focus in the next AY's cycle, if applicable - Upload all data collection documentation to Teams - Complete all required fields within the Planning Module in Xitracs - Provide updates to leadership/stakeholders as outlined in the cycle's plan <hr/> <ul style="list-style-type: none"> - Complete the reflection form for the next 3-yr cycle - Complete the goal setting form for the next 3-yr cycle |

YEAR 1: UNIT REFLECTION

At the beginning of each new cycle, units focus on reviewing progress from the previous cycle and analyzing their current operational state. To guide this process, units complete a structured reflection form based on selected Council for the Advancement of Standards in Higher Education (CAS) criteria. This framework prompts reflection

across seven key areas, enabling units to identify strengths, highlight opportunities for growth, and document evidence of their impact.

BEGINNING OF THE YEAR COORDINATION ACTIVITIES:

1. Identify a group of stakeholders to engage in the reflection process. Broad participation helps ensure an accurate and complete picture of the unit's current state.
2. Meet with the stakeholder group to work through the guided prompts in the reflection form.
 - For each of the seven areas, the group should determine:
 - An assessment rating of the unit's performance for that area.
 - Responses to guided prompts, focusing on what is working well, what challenges exist, and what evidence supports these statements.
 - After completing ratings and CAS reflections, the group will need to synthesize the information and:
 - Identify core strengths and weaknesses.
 - Consider internal and external factors that may influence operations during the cycle.
 - Establish five priority areas for goal development.

BEGINNING OF THE YEAR SYSTEM SUBMISSION ACTIVITIES:

3. Upload the completed reflection form to the respective channel folder in the [Administrative Assessment Planning and Assessment Teams space](#).

YEAR 1: UNIT GOAL PLANNING

After the reflection form is complete, units move on to the goal-planning form. This tool is designed to guide the goal-setting process and ensure that each goal aligns with institutional priorities. Units will establish specific, measurable goals that can be assessed throughout the three-year cycle to monitor progress and demonstrate impact.

BEGINNING OF THE YEAR COORDINATION ACTIVITIES:

1. Identify a group of stakeholders to engage in the goal setting process. Broad participation helps ensure all key priorities are identified.
2. Meet with the stakeholder group to work through the guided prompts in the goal planning form.
 - Identify at least five goals to achieve during the three-year cycle. For each of these goals outline:
 - Institutional strategic plan alignment – a Florida Poly strategic plan goal that relates to the unit goal.
 - Objectives – the key initiatives supporting the goal.
 - Activities – the tasks required to complete each objective.
 - Responsible parties – individuals who are accountable for the activities.
 - Timeline – the expected timeframe for completing the activities.
 - Measures of success – indicators that show when an objective is achieved.
 - Resources needed – the human physical and financial resources needed to accomplish the goal.
 - Measures of success – indicators that demonstrate when the overall goal has been achieved.
 - After establishing the goals, the group will need to
 - Map out the academic year when each goal will be addressed and assessed.
 - Explain how progress will be tracked.
 - Determine how progress will be communicated to stakeholders.

BEGINNING OF THE YEAR SYSTEM SUBMISSION ACTIVITIES:

3. Upload the completed goal planning form to the respective channel folder in the [Administrative Assessment Planning and Assessment Teams space](#).

YEARS 1-3: ASSESSING & GOAL ATTAINMENT

Once the goal planning is complete, units can begin working on the goal's objectives. Stakeholders should engage in the following tasks throughout the year:

DURING THE YEAR COORDINATION ACTIVITIES:

1. Review the goals identified for the current academic year.
2. Communicate with responsible parties to ensure they know their responsibilities and have a plan to work on them during the year.
3. Implement any planned interventions that support the academic year's goal(s).
4. Assess potential budgetary needs for the upcoming academic year and prepare justifications for funding requests.

END OF THE YEAR COORDINATION ACTIVITIES:

5. Reflect on completed activities and evaluate any collected data.
6. For each objective addressed during the year, write a summary of accomplishments and determine whether objectives were met.
7. Review overall progress and assess whether goals were achieved.
8. Determine if goals need to be extended or if any remaining goals need to be adjusted in the plan.
9. Provide updates to relevant stakeholders in accordance with the cycle's communication plan.

END OF THE YEAR SYSTEM SUBMISSION ACTIVITIES:

10. Upload data collected as measures of success to the designated channel folder in the [Administrative Assessment Planning and Assessment Teams space](#).
11. Complete all required fields in the Planning module in Xitracs. For more information on this process, see the Xitracs guide in the general resources folder in the [Administrative Assessment Planning and Assessment Teams space](#).

ADDITIONAL RESOURCES

Visit the [Administrative Assessment Planning and Assessment Teams space](#) to access these applicable resources for the administrative assessment cycle.

Administrative Unit Reflection Form

Administrative Unit Goal Setting Form

Administrative Unit Xitracs System Guide