Innovative Integration of Strategic Planning, Benchmarking, and Assessment

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Presentation available at http://uaps.ucf.edu

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Overview of Presentation

- concepts of integration
- models of university management
- unifying theme
- strategic planning concepts
- assessment concepts
- benchmarking concepts
- integration
- discussion
The University of Central Florida

- established in 1963 in Orlando Florida (first classes in 1968), Metropolitan Research University
- grown from 1,948 to 42,000 students in 35 years
  - 34,600 undergraduates and 7,400 graduates
  - 21 instructional sites in regional campus system
- doctoral intensive
  - 76 Bachelors, 62 Masters, 3 Specialist, and 20 PhD programs
- second largest undergraduate enrollment in state
  - projected largest undergraduate enrollment in 2005
- approximately 1,100+ faculty and 2,800 staff
- six colleges and two schools
  - Arts and Sciences, Business Administration, Education, Engineering and Computer Science, Health and Public Affairs, Honors, Optics, and Hospitality Management
What is Integration?

- integrate v. 1. To make into a whole by bringing all parts together; unify. 2. a. To join with something else; unite. b. To make part of a larger unit. (American Heritage Dictionary, 1996)

- what is the purpose of integration?
- what happens when the parts come together?
- why should strategic planning, benchmarking, and assessment be integrated?
- does the organization of a university affect the objectives or practice of integration of _____?
Management Models

- university model
  - centralized
    - planning, programs, facilities, budgeting
  - works well for smaller institutions

- strong college model
  - decentralized
    - planning, programs, budgeting
  - works well for larger institutions
Organization Implications

- university model
  - tighter controls on activities
  - focused accountability
  - explicit relationships
  - strong linkage to budget

- strong college model
  - flexibility in activities
  - ambiguous accountability
  - implicit relationships
  - budget connections are less direct
Challenges to Integrating _____

- university model
  - requires comprehensive examination of institution as a system
  - requires explicit understanding of interactions among activities
  - requires method for prescribing actions

- strong college model
  - requires clear understanding of vision
  - requires strong leadership at lower levels
  - requires clear understanding of purpose—unifying theme
  - may require multiple methods
Unifying Theme—Improvement

- strategic vision—where we want to be
  - assumption: destination is “better” than current place
  - IMPROVEMENT is required

- types of improvement
  - continuous—incremental
  - discontinuous—breakthrough
Opportunities for Improvement

- **strategic planning**
  - define vision
  - define breakthrough initiatives

- **program assessment**
  - ongoing review
  - focus on continuous improvement

- **benchmarking**
  - asymmetrical review
  - focus on breakthrough opportunities

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**Performance Improvement**

- Continuous improvement
- "breakthrough" discontinuous improvement

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*embed integrative approaches*
Creating the Vision

- driven by strategic planning
What is “Strategic?”

- type of thinking to shape and clarify the desired future profile of the university
  - expressed in the vision and goals
- elements of strategic thinking
  - evaluating strategic contribution of programs and units
  - identifying new strategic opportunities
  - determining areas to target for strategic emphasis
What is Strategic Planning?

- disciplined effort to produce fundamental decisions and actions that shape and guide
  - what the university is,
  - what the university does,
  - why the university does it, and
  - what the university must do to realize its vision

- strategy
  - means by which a university intends to accomplish a goal or objective
  - summarizes a pattern **across** policies, programs, projects, actions, decisions, and resource allocations

- active effort conducted periodically
Strategic Thinking

NOW

CRITICAL ISSUES

Requires strategic FOCUS

FUTURE
Common Terms

- **mission**
  - statement of organizational purpose--typically short

- **vision**
  - description of what the university will look like if it succeeds in implementing its strategies and achieves its full potential--vision of success--*inspirational*

- **values**
  - description of the code of behavior to which the university adheres or aspires

- **goal**
  - long-term target or direction of development. Provides basis for priorities and resource allocation. Meeting your strategic goals means that you have achieved your vision.
Traditional vs. Integrative Approach

Traditional (stovepipe)

Vision

Goal

Objective  Objective

Goal

Objective  Objective

Integrative Approach (facilitative)

Vision

Goal

Strategic Initiative

Goal

Strategic Initiative

Objective  Objective  Objective  Objective
Integrative Terms

- needed for synthesis to avoid stovepipe approach
- strategic Initiative
  - area of focus of effort that will make major contributions to achieving one or more goals
  - strategic initiatives are supported by objectives with measurable targets (amount and time)
- objective
  - measurable target met on the way to achieving a strategic initiative
- action
  - specific measurable activity that supports an objective
Keeping a Strategic Focus

- **Why do it?**
  - proactive orientation to controlling own destiny
  - identify key strategies to **breakthrough** improvement
    - assessment focuses on *continuous* improvement
  - provide driver for short term plans and resource allocation

- **challenges: keeping a long term focus**
  - may be seen as substitute for management review
    - evaluate operation and programs
  - everyone wants to be in the strategic plan
    - not the place for routine (but important) elements

- **How to do it?** –PROCESS and STRUCTURE are key
Integrative Strategic Planning Process

- use existing plan as baseline
- high level coordinating council—provide leadership
  - university committee (faculty senate)
  - revise mission, values, vision
- complete using a dual approach (broad-based input)
  - unit strategic planning reviews—bottom up
  - focus groups—cross-cutting (initiated top down)
- identify **strategic initiatives**
- key question: is it strategic?
  - Will this help the university take the big step forward to becoming the **object of the vision**?
Strategic Planning Process

Administrative

President

Academic

Focus Groups

Strategic Planning Council

Metropolitan and campus community

Strategic Plan
Pathways to Prominence
2002-2007

Central Florida's Metropolitan Research University

Excellence in Undergraduate Education
Graduate Program
Prominence
Research and Creative Activities
Excellence
Educational Access
Increased Visibility
Enhanced Collaboration and Partnerships
K-12 Involvement and Partnerships
Enhanced UCF Community
Operational Excellence
Promotion of Visual and Performing Arts
Enhanced Resources and Economic Development
University-Based Governance

* * * D R A F T (9/20/02) * * *
Strategic Plan Development Process

SPC Executive Committee
Draft Mission, Vision, Values and Goals

Focus groups
Commissions
(cross-cutting)

Strategic Initiatives and Objectives

Administrative unit strategic planning review
(bottom-up)

President, Provost, and SPC

Academic unit strategic planning review
(bottom-up)

Note: President, Provost, and SPC leadership feedback provided at interim steps
Focus Groups

- identify key issues, problems, and opportunities associated with designated area

- representative focus group areas:
  - quality of undergraduate education
  - quality of graduate education
  - research
  - international
  - partnerships and external influences
  - diversity
  - operational excellence
  - interdisciplinary
  - technology
  - creative activities
Integrative Strategic Planning Reviews

- focus on STRATEGIC—vision and goals
  - evaluate strategic contribution of programs and units
  - identify new strategic opportunities
  - determine areas to target for strategic emphasis

- process
  - involve both academic and administrative units
  - based on evaluations of unit self-studies
  - primarily use existing data and documents
  - college or division review of departments and units—integrative

- template
  - unit description
  - strategic review (SWOT)
  - strategic initiative recommendations
Synthesis—Finding Strategic Initiatives

- coordinating council and key administrators
- identify “strategic” initiatives
  - directions (pathways) to vision
- keep “strategic” focus
- key question: is it strategic?
  - Will this help the university take the big step forward to becoming the (object of the vision)?
Synthesis—Implementation

- coordinating council and key administrators
- create objectives
  - support particular strategic initiative
  - focus group content
  - academic and administrative strategic review content
  - guard against tendency to create operational vs. strategic objectives
- objectives should be measurable
- objectives supported by actions
- How do strategic actions relate to operational improvement?
Integration

- implicit through broad-based development of objectives and actions
- foundation for unit actions
Continuous Improvement

- driven by program assessment
What is “Assessment” in Higher Education?

- assess student learning
- assess student development
- classroom assessment
- assess the quality of programs
- assess the quality of support services
- assess university or college performance

For What Purpose?
Definition of Assessment???

- dictionary definition: assessment is the act of assessing; appraisal; evaluation (Webster)
  - to assess is to estimate or judge the value, character of, etc.; evaluate
  - to appraise is to estimate the nature, quality, importance
  - to evaluate is to judge or determine the significance, worth, or quality of

- BUT, dictionary definition has too many interpretations for program assessment
Evaluation Concepts

- **summative**—for making decisions about resources, people, institutions
  - accountability
  - performance evaluations
  - program review

- **formative**—for better understanding and *improvement*
  - institutional effectiveness (SACS)
  - student learning
  - program review
Clearly Separate Formative from Summative Uses

- if assessment is being used for improvement purposes
  - do not use the assessment measure targets to judge or grade the quality of the program or operation
  - do not punish programs for not making their targets
  - provide rewards for having an excellent assessment
    - **PROCESS**
      - provide rewards for conducting assessments and using the results to improve
- use different terms to distinguish
  - assessment (and institutional effectiveness) = formative evaluation
  - accountability and evaluation = summative evaluation
Assessment is Part of an Overall Planning and Evaluation Process

**linkages**
- share data and information
- inform budget process

**differences**
- different cycles
- additional data elements
- different purposes
  - continuous improvement
  - evaluation
  - planning
What Do We Mean by Program Assessment?

- it is a **formative** evaluation process designed to support program improvement
- it is continuous
- it is focused on improvement
  - student learning
  - student development
  - the institution and its people

Shewhart Plan → Do → Check → Act → Plan
Why Do It?

- external drivers
  - regional and program-level accreditation criteria
    - documentation that you have established an effective assessment process that leads to continuous improvement
  - Baldridge Award
- internal drivers
  - good management
  - quality motivation
  - knowing where you are
  - knowing where you have been
  - knowing what is possible and how to get there
Institutional Effectiveness Program Assessment

- focuses on continuous quality improvement
  - academic programs
  - administrative support units
-examines students learning outcomes, program outcomes, customer satisfaction, and unit performance to identify areas to improve
-leads to actions
-conducted annually
SACS Reaffirmation

- **Principles of Accreditation**
  - focus on quality enhancement
  - core requirements
  - comprehensive standards
  - Title IV programs

- institutional effectiveness (IE)
  - “The institution engages in ongoing, integrated, and institution-wide research-based planning and evaluation processes that incorporate a systematic review of programs and services that (a) results in continuing improvement and (b) demonstrates that the institution is effectively accomplishing its mission.”  
    (Core Requirement 5)
  - “The institution identifies expected outcomes for its educational programs and its administrative and educational support services; assesses whether it achieves these outcomes; and provides evidence of improvement based on analysis of those results.”  
    (Comprehensive Standard 16)
What Programs Within the Institution Should Do It?

- educational programs should conduct formative assessments of student learning and of research and service
  - all levels: Associate, Bachelor, Master’s, Doctoral
  - all disciplines and special programs (e.g., General Education)
- administrative and educational support services should conduct formative assessment of their operations, processes, and programs
  - admissions, student support offices, administrative support offices, budget offices, computer technology support office, institutional research
Integrative Program Assessment System

- management objectives for assessment system
- process design: content, focus, and mechanics of the program assessment process
- quality assurance (QA) process
- schedules and timelines for program assessment
- support and documentation
Mechanics of Assessment

- assessment is a continuous improvement process
- to improve, you need to know where you are today and where you would like to go
  - mission (purpose)
  - vision (where you would like to go)
  - goals (steps to getting where you would like to be)
  - objectives (what you need to achieve in order to get there)
  - measures (how well you are currently doing)
- to improve, you need to take action
  - analyze your program or operations to determine changes
  - plan the changes
  - take action
Design to “Close the Loop”

- common characteristics of assessment models to close the loop
  - develop assessment plan and measures for future period
  - collect data and analyze to produce “results” for previous period
  - use results to determine what needs to be improved
  - make changes and measure the effects in a future period

- need to distinguish between the assessment planning phase and the assessment results phase
Quality Assurance of the Assessment Process

- quality assurance (QA) is needed to ensure that the units and programs are following the process and doing it well

- QA may provide one or more of the following
  - leadership of the assessment effort
  - management of the assessment process
  - monitoring function
  - feedback loop to improve the process
  - training
  - support
  - consultations
Organizational Elements

- **decision authority**
  - authorizes the process

- **quality assurance authority**
  - monitors process
  - recommends process, cycle, and schedule

- **doers**
  - conduct assessment
  - document

- **support**
  - for doers
  - for quality assurance function
CONTINUOUS QUALITY IMPROVEMENT PROGRAM ASSESSMENT SYSTEM

SPRING
February—units submit assessment plans
March—DRC review plans
May—UAC approves plans

FALL
October—units submit assessment results
November—DRC review results
December—UAC approves results

President

Approved Plans and Results

University Assessment Committee

Academic Divisional Review Committees

Administrative Divisional Review Committees

Academic Units

Results

Plan

Results

Plan

Results

Plan

Results

Plan

Quality Assurance

Program Assessment Support

• Assessment policy and process expertise
• UAC administrative support
• DRC training and support

• System development and maintenance
• Web sites

• Institutional surveys
• Unit surveys and analysis

October 27, 2003

Integrating Strategic Planning, Benchmarking, and Assessment
Parallel Schedule for Conducting Annual Assessment

- in any given year (three activities in parallel)
  - develop assessment plan for next year
  - measure and analyze the results for the current year
    - The measures document the impact of the changes made the prior year(s)
  - act on the results from a prior year and implement changes

- it is important to close the loop
  - use the results of assessment to implement changes
  - then measure impact of changes to affect your next plan

- submission and review schedule
  - annual
    - plan for next year and results from past year submitted and reviewed together
  - semi-annual
    - two separate submissions and reviews
    - review of results informs plan preparation
Support for Assessment

- assessment process and methods expertise
- training
  - unit and program level
  - divisional and university committees conducting QA
- consultations
  - developing mission, objectives, and measures
- survey design and analysis
  - program and unit-level data
  - easy and timely access to results
- technical support
  - web-enabled databases
  - documentation archiving
Continuous Quality Improvement
Assessment Plan and Results Process Menu

Welcome to the UCF Institutional Effectiveness Assessment Plan and Results development and review website. The following links are organized with the assessment plan development and review process on the left and the assessment results and review process on the right. Select the button that corresponds to your role in the assessment process.

Spring Assessment Plan Process
- PROGRAM OR UNIT
- DIVISIONAL REVIEW COMMITTEE
- DIVISIONAL REVIEW COMMITTEE CHAIR
- UNIVERSITY ASSESSMENT COMMITTEE

Fall Assessment Results Process
- PROGRAM OR UNIT
- DIVISIONAL REVIEW COMMITTEE
- DIVISIONAL REVIEW COMMITTEE CHAIR
- UNIVERSITY ASSESSMENT COMMITTEE

Continuous Quality Improvement supports the University’s Institutional Effectiveness process.

Last Modified: 09/18/2003 Pages are maintained by: ceas@mail.ucf.edu/Website.Adm=ucf.edu Database Administrator: position@ucf.edu

Integrating Strategic Planning, Benchmarking, and Assessment
Integration

- fostered through development of program or unit mission consistent with strategic vision
- continuous review requires consistent focus on mission and vision
Breakthrough Improvement

- driven by benchmarking initiatives
What is Benchmarking?

- **benchmark** n. 1. A standard by which something can be measured or judged. 2. Often bench mark. A surveyors mark made on a stationary object of previously determined position and elevation and used as a reference point in tidal observations and surveys.  --**benchmark** tr.v. To measure (a rival’s product) according to specified standards in order to compare it with and improve one’s own product.  

(American Heritage Dictionary, 1996)
What is Benchmarking?

- the continuous process of measuring our products, services and business practices against the toughest competitors or those companies recognized as industry leaders (Xerox Corp.)

- a basis for establishing rational performance goals through the search for industry best practices that will lead to superior performance (Camp, 1989)
What is Benchmarking?

- “benchmarking involves
  - first examining and understanding your own internal work procedures,
  - then searching for "best practices" in other organizations that match those you identified, and finally,
  - adapting those practices within your organization to improve performance. It is, at bottom, a systematic way of learning from others and changing what you do.” (Epper, 1999)

- process for identifying gaps so that you can improve
- not about performance measurement or rankings
  - although measures are used
Approaches to Benchmarking

- problem-based
  - when a problem comes up, you focus a benchmarking effort on the problem

- process-based
  - focuses on the vital (few) business processes
    - survey support
    - process analysis support
    - assessment support
  - accepted as correct approach (Camp, 1995)
Types of Benchmarking

- competitive benchmarking
  - benchmarking against competitors

- functional benchmarking
  - benchmark against “best in class” in the operation or process of interest

- performance benchmarking
  - process for identifying benchmarks and identifying stretch targets

- strategic benchmarking
  - process used for identifying world class standards, determining gaps in competitiveness, developing strategies, and remaining focused and aware of developments
Related, But Not Benchmarking

- comparative analysis
  - requires identification of comparables for whatever objective one has in mind, but not generally for improvement purposes
- key performance indicators (KPI)
- accountability measures
- institutional characteristics
Integrative Benchmarking Process

- **plan**
  - functions or processes to benchmark
  - benchmark measures (key performance variables)
  - who to benchmark (best-in-class, partner)

- **collect data**
  - acquire data, observe

- **analyze data**
  - identify actions to close gap

- **adapt for improvement**
  - specify improvement programs and actions
  - implement plans
Approaches

- **lone ranger**
  - third party data
  - inference

- **partner**
  - win-win
  - mutual exchange on best-in-class processes
  - data exchanges and visits

- **consortium**
  - participant
  - observer
  - requires significant effort
What Do We Want Benchmarking to Mean for Programs?

- process improvement
  - process benchmarking—comparison against “best-in-class” for a specified process
    - external—admissions process
    - internal—departmental advising practices

- comparative analysis
  - curiosity, potentially leading toward process improvement
  - competitive benchmarking—how are we doing relative to our “competitors”? (e.g., Florida schools admitting National Merit Scholars)
  - best-in-class benchmarking—how are we doing relative to a specified class of comparable institutions? (e.g., Metropolitan Research Universities)
  - world-class benchmarking—how do we rank among the best universities?
Practical Questions

- what do I measure (benchmark)?
- who do I compare to?
- what process should I use?
- where do I get data?

*answer:* it depends on what you want to accomplish
How To Get the Data?

Benchmark Data Request Form
University of Central Florida

UCF Program: ________________________________
Benchmark Program: ________________________________
Benchmark Institution: ________________________________
Contact Name: ________________________________
Contact Email: ________________________________

The University of Central Florida is conducting a benchmarking study in order to compare some of its programs to other programs that are considered to be among the best in the nation. We are requesting your assistance in completing our study. Please provide the information requested below from the most recent 12-month reporting period at your institution. The student data should come from fall 2001 only. Define your reporting period by specifying your inclusive dates in the space provided below (e.g., 1 July 2001-30 June 2002). After completing this form, please return it by email to XXXX. Your assistance in this regard is greatly appreciated.

Reporting Period: ________________________________

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### How To Organize The Data?

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*Raw Numbers are represented by #DIV/0!*
Comparison Methods

- looking at summary data to develop impressions of where programs “ranked”
- dominance ranking
  - primary method used
- data envelopment analysis (DEA)
- hierarchical “weight and rate” approach
Integration

- asymmetrical activity
- explicit integration with ongoing program assessment
  - considers additional factors
- mandated in program review
Integrative Program and Unit Reviews

- comprehensive evaluation of a program or unit
  - conducted periodically (every 5 to 7 years)
- uses information and data from multiple years
  - provides longitudinal view—integrative over time
- requires mission, vision, and goals of program or unit
  - checks alignment with university mission and goals
- requires evaluation of demand, quality, centrality, competitive advantage, and cost
  - program assessment supports the evaluation of quality
  - benchmarking supports the evaluation of competitive advantage
Integration Enhancers

- high level support for improvement activities
- commitment to strategic vision
- facilitated program assessment process
- support for benchmarking initiatives
- emphasize interrelationships
Discussion and Questions

Contacts:
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