

Integrating Performance Indicators and Assessment Details

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The usual view: two purposes, two processes

- ◆ **Assessment details:** information for planning and improving programs
- ◆ **Performance indicators:** tools for planning and accountability

Alternative: an integrated process

- ◆ **The problem:** Performance indicators don't give enough details for action; assessment details don't permit quick summaries, benchmarks or comparisons
- ◆ **The usual solution:** Treat them as independent processes, doubling the work of IR staff and interfering with clear communication

Advantages of an integrated process

- ◆ **The assessor and the planner:** different perspectives, common goals
- ◆ **Reduce duplicated effort**
- ◆ **Measure the right thing,** stay focused on what matters/what works
- ◆ **Effective communication**

How do you do it?

- ◆ Plan/think in terms of **both** purposes
- ◆ Keep the process **rooted in program assessment**
- ◆ Use some measures that **serve both purposes**
- ◆ Use measures in **multiple ways**

Using measures in multiple ways

- ◆ **Concordances:** multiple reports from (almost) the same sets of data
- ◆ **Push information in both directions**

Push information in both directions

- ◆ Institutional-level summaries inform program issues
 - ◆ as **dashboard indicators**
 - ◆ to **identify best practices**
 - ◆ to inform **selection of performance targets**
 - ◆ but watch out for **oversimplification**

Push information in both directions

- ◆ **Roll assessment details up** into institutional/collective performance indicators
 - ◆ Simple roll up may not be possible or appropriate
 - ◆ Harder but more useful: **summarize unit-level information**

Summarize unit-level information

- ◆ That is **relevant** to the program
- ◆ That provides **interpretive context** for better evaluation
- ◆ General strategy: **transform the data** to increase comparability without losing context

Transform the data

- ◆ **Rough guides:** rating different kinds of data on a common scale
 - ◆ Same principle as using student portfolios to evaluate programs

- ◆ **Requires**
 - ◆ Goal areas
 - ◆ Ways to measure performance relevant to each goal area
 - ◆ Performance targets

Transform the data

- ◆ **Rough guides:** rating different kinds of data on a common scale. For example:
 - ◆ Do students meet program's standards in at least X% of the program's goal areas?
 - ◆ "Contribution to education"
 - ◆ Is an assessment process in place with results used for program planning?

Transform the data

- ◆ **Weighted indices:** composite measures with components weighted differently to reflect unit contexts

Advantages of transformation

- ◆ **Reduces risk** of inappropriate comparisons
- ◆ Permits rolling up **different kinds of data**
- ◆ **Provides context** for benchmarking

General principles

- ◆ **Keep both purposes in mind**
- ◆ **Foundation is the program level**
- ◆ **Transform and combine**
- ◆ **Tailor communications, not the content**
- ◆ **Remember: performance indicators are pointers, not "the" measures**