

INSTITUTIONAL EFFECTIVENESS ASSESSMENT PLAN

Approved by Loyola Conference November 2021



LOYOLA
UNIVERSITY MARYLAND

Loyola University Maryland is a Jesuit, Catholic university committed to the educational and spiritual traditions of the Society of Jesus and to the ideals of liberal education and the development of the whole person. Accordingly, the University will inspire students to learn, lead, and serve in a diverse and changing world.

In the University's commitment to achieving its mission and goals, Loyola values Ignatian practices of reflection and discernment to make the freer choice—the decision that leads to the *magis*, or the greater good. Loyola has adopted a formalized plan for the assessment of its effectiveness at planning, implementing, and providing resources for the programs and initiatives that advance the University's mission and goals.

In our commitment to core values of the University, such as *Academic Excellence* and *The Constant Challenge to Improve*, we signify our support for the implementation of the Loyola University Maryland Institutional Effectiveness Assessment Plan.

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Table of Contents

Loyola University Maryland Institutional Effectiveness Assessment Plan.....	1
Purpose of the Plan:.....	1
Principles:.....	1
Annual and Cyclical Reporting Plan	2
Report Contents.....	4
Reporting Methods	5
Communication and Dissemination	5
Support for Institutional Effectiveness Assessment	6
Accountability	6
Review of Middle States Accreditation Standards.....	6
Report Contents.....	6
Reporting Methods	7
Timeline.....	7
Communication and Dissemination	7

Loyola University Maryland Institutional Effectiveness Assessment Plan
Approved by the Loyola Conference on November 23, 2021

Institutional effectiveness is a reflective, systematic, and ongoing process, the primary purpose of which is the improvement of the University's progress toward its mission and goals. Assessment allows actions to be taken with evidence-based decision-making in light of Loyola's core value, the constant challenge to improve, and for the purpose of progress toward achieving the mission and strategic priorities of Loyola University Maryland.

Purpose of the Plan:

Conduct regular, systematic, ongoing assessments of how effectively Loyola University Maryland fulfills its mission and goals. In following the assessment plan, Loyola aims to (1) ensure its planning processes, resources, and structures are aligned with each other, (2) evaluate its programs and services continuously, and (3) identify opportunities and challenges that present at the institution-, division-, and unit-level as a result of self-reflective, evidence-based analysis.

Principles:

Loyola University Maryland will foster and engage in a culture of assessment at the institutional level and across functional areas. In doing so, the University will adhere to the following principles of assessment:

- **Alignment**: Clear fidelity to the University's mission through alignment of institutional, divisional, and unit-level goals. Similarly, clear and transparent connections from unit-level, divisional, and institutional assessments that demonstrate the relationship of the aforementioned goals in the fulfillment of Loyola's mission and strategic goals.
- **Clarity of goals**: Clear statements of goals and intended outcomes that align with the University's mission and/or strategic goals and that communicate to the Loyola community the priorities valued by the University for planning, budgeting, resource allocation, implementation, and continuous improvement.
- **Evidence and measurement**: Identification of key performance indicators (KPIs), scorecards, and other metrics to measure progress toward mission and goals. Continuous collection of data and evidence that are relevant to the goals, resource requirements, and intended outcomes statements.
- **Deliberation and analysis**: Analysis of evidence toward achieving the specified goals and intended outcomes. Deliberation among those closest to expertise, responsibility, and accountability for the assessed goal.

- Dependability: Regular, predictable, and ongoing processes for the systematic identification, collection, and analysis of evidence and data that are relevant to the successful fulfillment of the University's mission and goals.
- Equity-minded: Assessment plans will benefit from an equity-mindset that collects evidence and data in ways that allow for data disaggregation to examine disparities in services or goal attainment. Remaining committed to inclusivity, particularly of stakeholders, in assessment planning, reporting, and dissemination deepens the value of the assessment outcomes, leading to meaningful actions.
- Sustainability: Considering the usual constraints of time and resources, assessment plans at all levels and areas of the University work toward collecting and analyzing the most meaningful data/evidence and identify those sources of data/evidence that are unavailable so that the University can work toward data collection solutions. Overly cumbersome plans tend to be set aside, so the aim will be to keep the plans as direct and simple as possible.
- The Constant Challenge to Improve: Commitment to self-assessment, accountability, and the use of assessment to identify strengths, challenges, and opportunities for continuous improvement or innovation. The use of evidence and analysis to inform budgeting, planning, and decision-making. Taking action to improve results, resource allocations, and sustained progress toward mission and goals. Using an iterative approach to continuously improve and grow assessment practices as well.
- Transparency: Dissemination of reports on the assessment of the University's effectiveness in achieving and supporting our mission and strategic goals. The communication of assessment reports is meant to:
 - foster engagement across various University communities and stakeholders
 - provide evidence of progression toward stated mission and goals
 - inform and document University efforts for continuous improvement, including planning, budgeting, resource allocation, and decision-making for the vitality and well-being of the institution, its students, and the Loyola community.

Annual and Cyclical Reporting Plan

Loyola University Maryland will regularly assess its effectiveness at the institution-, division-, and unit-level.

1. Institution-level goals will be measured with KPIs, and analyses will be provided to the Loyola Conference.
2. Division-level outcomes statements will be measured and evaluated for successfully supporting the University's fulfillment of the mission and strategic goals.

3. Unit-level objectives will be measured and evaluated for successfully supporting the division’s outcomes, and therefore the University’s fulfillment of the mission and strategic goals.

Reports will be completed on an annual or cyclical basis, as determined by the needs of the University, division, and unit.

Example:

Level of Institution	Assessment Type	Assessment Frequency	Measure Type
University	Strategic Priorities	Annual	Key Performance Indicators (KPI)
Division	Division Outcome Statement(s)	Annual	Sub-KPI
Unit (Academic/ Non-academic offices, departments, centers, student services, etc.)	Unit Objectives	Annual	Metrics
University	Campus Climate	5-year cycle	Campus Climate Survey
University	Undergraduate Student Learning	Annual	Undergraduate Learning Aims
University	Graduate Student Learning	Annual	Graduate Learning Goals
University	Core Curriculum	Tri-annual	Assessable Learning Outcomes
University	Undergraduate Student Engagement	Tri-annual	e.g., NSSE/ FSSE/ NASCE/ alumni surveys ¹
University	Graduate Student Satisfaction	Tri-annual	Graduate Student Satisfaction Survey
Unit (Academic and Co-curricular programs)	Program Learning Outcomes	Annual	Artifacts of student knowledge and skills, and/or Self-assessments

The reports on the assessment results will be shared, as appropriate, with relevant governance bodies and vice presidents for the purposes of continuous improvement, including informing resource allocations in support of strategic initiatives in the annual budgeting process. Vice presidents will report on how the assessment results informed decision-making, planning, budgeting, and/or resource allocations in the annual divisional reports.

¹ National Survey of Student Engagement (NSSE), Faculty Survey of Student Engagement (FSSE), National Assessment of Service and Community Engagement (NASCE)

Report Contents²

To provide conformity and standard reporting elements, outcomes-based institutional, divisional, and unit-level assessment reports should include:

1. Mission statement (if appropriate)
2. Clear statement of goals (i.e., Institutional strategic priorities, Division outcome statements, Unit objectives) and their alignment to Division-level or University-level mission or goals
3. Identification of responsible parties, sufficient resources, stakeholders, and constituents for each strategic priority/division outcome statement/unit objective (referred to generically now as “goals”)
4. Clear targets for successful completion/achievement of the goals
5. Multiple measures per goal
6. Collection of evidence/data
7. Summary of the results from the collection of evidence/data
8. Analysis of results, compared to the targets for success (i.e., did the impact match what was intended?)
9. Conclusion as to whether the goal has been met or not, and analysis of
 - a. whether resources were sufficient to achieve the intended outcome
 - b. the effectiveness of past actions taken for continuous improvement
 - c. what the next steps should be for the following year (see #10)
10. Identification of actions to take for continuous improvement (a.k.a. “Close the Loop Actions”); for divisional reports from vice presidents, this should include identification of how results within the division or supervisory area were/will be connected to decision-making, planning, budgeting, or resource allocation, such as responses to the following prompts:
 - a. what actions, if any, will continue (because they are effective or demonstrate promise of being effective)?
 - b. what actions, if any, will stop (because they are ineffective or have low return on investment of time and resources)?
 - c. what actions, if any, will be new (to improve the outcome)?
 - d. what training or professional development will be helpful to improve the outcome?
 - e. what financial resources will be allocated or reallocated to accomplish this?
 - f. what technological resources will be devoted to this?
 - g. what human resources will be planned, reassigned, redefined for this?

² Survey results (e.g., NSSE, FSSE, NASCE, Graduate Student Satisfaction) are typically provided in presentations based on themes that are relevant to understanding the student experience, so we would not expect those reports to conform to the standards outlined for institutional, divisional, and unit-level assessment reports.

Reporting Methods

The committee on institutional effectiveness recommends that the University use a centralized reporting platform to maintain organized files, data, and management of assessment reports. More importantly, the centralized reporting platform available to the University permits alignment mapping that will allow the University to extract reports on goal achievement at each level of the University: institutional, divisional, and unit-level.

To accomplish this, the University will need to support each division and unit in the adoption and continual use of the reporting platform. This will require time, training, professional development, and considerations for the responsibilities of faculty, staff, and administrators. Ideally, it will include technology support from the University as well. Thus, the committee recommends a multi-year phase-in, beginning at the institutional level, proceeding to the divisional level, and then incorporating unit-level reports.

In addition, the deliberative nature of assessment and the thoughtful identification of actions for continuous improvement require dedicated time, especially for collaboration and professional development. In the long term, the University, divisions, or units might benefit by considering how to create that time in regular intervals, such as Assessment Days or Data Retreats.

Communication and Dissemination

A communication workflow should be developed for every type of report and made transparent as part of the annual process.

Example:

Engaged by	Supervisor/ Chair	Dean	VP	CIE*	Loyola Conference*	CASL*	Academic Senate*	Cabinet	BOT
<i>Type of Report</i>									
<i>Strategic Priorities</i>			X	X	X			X	X
<i>Division Outcomes</i>				X	X			X	X
<i>Unit Objectives</i>	X	X	X						
<i>Institutional Learning Outcomes</i>			X	X	X		X	X	
<i>Institution-level Student Satisfaction and Engagement Surveys³</i>				X	X	X	X	X	X
<i>Program Learning Outcomes</i>	X	X	X			X			

*These bodies include student membership or engagement.

³ e.g., NSSE, NASCE, Graduate Student Satisfaction Surveys

Support for Institutional Effectiveness Assessment

The committee on institutional effectiveness and the office of academic affairs (OAA) will support the University, the divisions, and units in developing assessment skills. Specifically, committee members and OAA will provide support in developing or refining divisional outcomes statements or unit objectives, mapping alignment to institutional goals, building report platforms, adopting the centralized reporting system, refining assessment practices, and producing reports from the centralized system.

Accountability

Loyola will hold itself accountable through the establishment of an annual and cyclical reporting plan that is systematic and organized:

- Timeline is established to determine when each outcome can reasonably be achieved (over years)
- Responsible parties are identified for each outcome
- A reporting workflow is identified for each outcome, from origins to responsible party(ies) and to dissemination through university bodies, with deadlines and accountability for completing reports thoroughly and on time
- Individuals with responsibility for coordinating IE assessment activities and reporting IE assessment findings/plans for improvement are identified in every area: offices/departments/centers/programs/university divisions
- Outcomes assessment occurs on a regular basis, typically annually, to measure progress over time
- Offices/departments/centers/programs/university divisions set or reaffirm their goals annually to make progress on outcomes for the university mission and goals
- Offices/departments/centers/programs/university divisions report on their effectiveness at achieving the annual goal(s)

Review of Middle States Accreditation Standards

The University will monitor adherence to Middle States accreditation standards between self-study events. Each year, the committee on institutional effectiveness will report on two to three standards and will compile evidence of Loyola's continued ability to meet the standards. Analysis will be provided to highlight areas for improvement and to monitor progress toward the opportunities identified in the 2020 self-study (see appendix).

Report Contents

The report will examine the overarching standard, standard criteria, and related requirements of affiliation.

Elements will include:

1. Narrative that demonstrates adherence to the overarching statement of the standard.

2. Progress toward the Opportunities for Improvement and Innovation identified in the 2020 Self-Study.
3. New initiatives or programs since the 2020 Self-Study that demonstrate how Loyola meets the standard.
4. A compilation of documented evidence for the criteria of the standard, including systematic and ongoing assessment and program reviews.
5. Proposed Actions for Continuous Improvement

Reporting Methods

The committee on institutional effectiveness has the option to complete the reports in a centralized reporting software platform. Reports and evidence will also be stored in the CIE Microsoft Teams site.

Timeline

The proposed cycle of standards and review is:

Year 1 (2021-22)	Standard I - Standard VI -	Mission and Goals Planning, Resources, and Institutional Improvement
Year 2 (2022-23)	Standard III - Standard IV - Standard V -	Design and Delivery of the Student Learning Experience Support of the Student Experience Educational Effectiveness Assessment
Year 3 (2023-24)	Standard II - Standard VII -	Ethics and Integrity Governance, Leadership, and Administration
Years 4-6	Repeat the cycle above.	

Communication and Dissemination

The committee on institutional effectiveness will report its findings on accreditation standards to the Loyola Conference and the Cabinet on an annual basis. For some standards, other bodies will receive reports as well.

Example:

Standard	Loyola Conference*	Budget Committee*	CASL*	Academic Senate*	Cabinet
I – Mission & Goals	x				x
II – Ethics & Integrity	x				x
III – Design & Delivery of the Educational Experience	x			x	x
IV – Support of the Student Experience	x				x
V – Educational Effectiveness Assessment	x		x	x	x
VI – Planning, Resources, and Institutional Improvement	x	x		x	x
VII – Governance, Leadership, & Administration	x			x	x

*These bodies include student membership or engagement.

Glossary

Institutional Effectiveness: Institutional effectiveness is a reflective, systematic, and ongoing process, the primary purpose of which is the improvement of the University's progress toward its mission and goals.

This is accomplished by using evidence of student growth and achievement, institutional capacity, and institutional vitality to improve educational quality, student support, campus climate and culture, and the University's engagement with its local and global community. Institutional effectiveness requires us to successfully integrate assessment practices across the institution, provide evidence of student learning outcomes to stakeholders, and use assessment results to guide institutional decision-making and improve student performance.

Key Performance Indicators (KPI): An institution-level measurement of performance. The KPI often are selected from measures at a highly summary level that simply *indicate* the general strength or trajectory of the University's progress toward mission and goals. Such measures typically do not provide a great deal of nuance but do provide a "big picture" view of institutional performance. These measures typically take strategic levels of investment and sustained effort to "move the needle" over time. Some examples of KPI include:

- Student success measures, such as retention and graduation rates
- Student body size
- Endowment value

Metrics: In the case of this document, a general term used as an umbrella for various types of measures of success, other than KPI, at different levels of the institution. Metrics are attributed to a goal and should provide a meaningful measure of the intended outcome of the goal, as related to the level of the university that supports achievement of the goal. The scope of metrics often provides a way to measure performance of shorter-term goals that can demonstrate achievement with more immediacy than the multi-year expectations of improving a key performance indicator.

- Some examples include measurements of impact, e.g.
 - data that indicate student/faculty/staff/administrator achievement
 - data that indicate the quality of programs or services
 - quantities (offered, collected, fundraised, etc.)
 - student or faculty feedback after programming or professional development events
 - participation or usage data
 - implementation of an action identified for continuous improvement as the result of a past assessment
- Some examples include measurements of new inputs, e.g.
 - the development of criteria for a new initiative
 - the development of a comprehensive resourcing and implementation plan for a new initiative
 - the revision and overhaul of a process or procedures for greater efficiency, clarity, etc.

Attachment:

Loyola University Maryland's 2020 Self-Study –

Excerpt of the Opportunities for Improvement and Innovation

Standard I, Mission and Goals
<ul style="list-style-type: none">• Continue to develop, as resources permit, current strategic initiatives, such as the Mission Driven Leadership program
<ul style="list-style-type: none">• Identify new opportunities to advance the priorities of equity and inclusion and environmental sustainability found in the <i>Mission Priority Examen</i> and rooted in <i>The Ignatian Compass</i>.
<ul style="list-style-type: none">• Continue to monitor and assess progress towards completion of strategic initiatives identified in <i>The Ignatian Compass</i> and the <i>Mission Priority Examen</i>, as well as other institutional goals.
Standard II, Ethics and Integrity
<ul style="list-style-type: none">• Prioritize the proper resourcing of the office of equity and inclusion
<ul style="list-style-type: none">• Promote educational opportunities around diversity, equity, and inclusion amongst all Loyola constituencies
Standard III, Design and Delivery of the Student Learning Experience
<ul style="list-style-type: none">• Support the Undergraduate Curriculum Committee subcommittee on the Diversity Course Requirement in following through with Senate-approved motions to “establish clear criteria on what constitutes a diversity course” and to “conduct a review of a department’s inventory of diversity courses.”
<ul style="list-style-type: none">• Implement plans for the inaugural Equity and Inclusion Faculty Fellows cohort to review data and information from the Diversity Course Requirement Subcommittee and work with the Undergraduate Curriculum Committee to address student and faculty members’ concerns about the Diversity designation.
<ul style="list-style-type: none">• Enhance assessment of academic initiatives by looking deeper into intersections of race/ethnicity and gender to determine whether patterns of inequity exist in the academic engagement of students.
<ul style="list-style-type: none">• Investigate the ways in which student persistence in major fields of study can be supported for inclusive academic excellence. Pay particular attention to the ways academic programs and support structures might eliminate patterns of disparity in student success.
<ul style="list-style-type: none">• Continue to invest in digital teaching and learning so that HIPs may continue to be integrated in digital teaching platforms for the promotion of equity, inclusion, and inclusive academic excellence.
<ul style="list-style-type: none">• Build on the early success of the Center for Innovation & Entrepreneurship and foster an ecosystem of innovation at Loyola by providing greater access to opportunities for students to learn to prototype, learn new technologies, succeed and fail in their efforts, and work in teams.
Standard IV, Support of the Student Experience
<ul style="list-style-type: none">• Investigate further the retention and persistence of students of color. Use the findings to improve the student experience.
<ul style="list-style-type: none">• Continue an emphasis on student support initiatives, such as the Multicultural Awareness Program, Ignatius Scholars Program, and the <i>Advising as Teaching</i> model, that increase a sense of belonging and that intentionally build a vision of diversity, equity, and inclusion as pillars of academic excellence.
Standard V, Educational Effectiveness Assessment

<ul style="list-style-type: none"> • Continue implementation of the Three-year University-wide Assessment Plan.
<ul style="list-style-type: none"> • Develop the next university-wide plan for assessment with attention to an Institution-level Learning Outcome assessment cycle aligned with the Undergraduate Curriculum Committee’s future goals for evaluating student learning in the new core curriculum.
<ul style="list-style-type: none"> • Continue the conversation of equitable and inclusive assessment practices in the Committee on the Assessment of Student Learning by reading the literature of the field and designing its next strategic plan with these principles in mind.
<ul style="list-style-type: none"> • Support the office of institutional research as it works to provide the University with timely access to data and a new data visualization platform.
<ul style="list-style-type: none"> • Encourage the university community to use existing data sources as much as possible to reduce survey fatigue among students. Consider how the standing committee status of the Committee on Institutional Effectiveness might be leveraged for this purpose after completion of the Middle States self-study and site visit.
<p>Standard VI, Planning, Resources, and Institutional Improvement</p>
<ul style="list-style-type: none"> • Continue to invest in digital learning as an innovative methodology that would distinguish Loyola from peer institutions and help promote sustainable business operations by allowing the University to deliver an education to a more diverse array of students.
<ul style="list-style-type: none"> • Revisit the Technology Services Roadmap to ensure that resources are invested appropriately to account for the rapid change of technology innovation in higher education.
<ul style="list-style-type: none"> • Remain cognizant of the importance of compensation equity and appropriately prioritize financial resources to salary increase pools, when available.
<ul style="list-style-type: none"> • Advance identified initiatives around environmental sustainability in pursuit of 100% carbon neutrality by 2050, consistent with the aspirations of <i>The Catholic Climate Covenant (St. Francis Pledge)</i> and goals identified in the University’s <i>Climate Action Plan</i>.
<p>Standard VII, Governance, Leadership, and Administration</p>
<ul style="list-style-type: none"> • Conduct, when appropriate, the board of trustees’ previously planned comprehensive assessment of its structure and function to ensure that it is well positioned to provide fiduciary oversight and support of the University’s Jesuit, Catholic educational mission.
<ul style="list-style-type: none"> • Continue the ongoing review of the Budget Committee to determine if a revised structure would promote greater efficiencies as the committee discharges its responsibilities.

Attachment:

Loyola University Maryland Key Performance Indicators for strategic priorities of
The Ignatian Compass strategic plan and the Mission Priority Examen

ALIGNED MEASURES: KEY PERFORMANCE INDICATORS BY INSTITUTIONAL PRIORITIES
Ensuring Institutional Vitality & Sustainability
<ul style="list-style-type: none">• Reaffirmation of Jesuit Character by the Society of Jesus
<ul style="list-style-type: none">• 80% 4-Yr Graduation Rate by 2026
<ul style="list-style-type: none">• 84% 6-Yr Graduation Rate by 2028
<ul style="list-style-type: none">• UG Student Body Size, FTE
<ul style="list-style-type: none">• Average Net Tuition Rev per UG FTE
<ul style="list-style-type: none">• Gross Graduate Tuition Revenue
<ul style="list-style-type: none">• Endowment Value
<ul style="list-style-type: none">• 100% Carbon Neutrality by 2050
<ul style="list-style-type: none">• 65% of undergraduate students participating in service-related endeavors, as of 2030
Improving Yield & Retention
<ul style="list-style-type: none">• 14-15% Yield Rate by 2026
<ul style="list-style-type: none">• 90% 2nd-Yr Retention Rate by 2026
Creating a Culture of Philanthropy
<ul style="list-style-type: none">• Endowment Value

ALIGNED MEASURES: KEY PERFORMANCE INDICATORS BY INSTITUTIONAL PRIORITIES

Engaging Faculty & Staff; Ignatian Formation

- 70% Completion Rate of Mission-Driven Leadership training

Fostering Diversity, Equity, & Inclusion

- 80% 4-Yr Graduation Rate by 2026, overall and by race/ethnicity, gender, and Pell-eligible student populations
- 84% 6-Yr Graduation Rate by 2028, overall and by race/ethnicity, gender, and Pell-eligible student populations
- Increased 2-Yr Graduation Rates for transfer students by 2024

Cultivating Innovation & Entrepreneurship

- Launch of Center of Innovation & Entrepreneurship
- Opening of the Fernandez Center for Innovation and Collaborative Learning

Enhancing Brand

- Launch of New Brand and New Website Homepage in February 2020