

2016-2017 Assessment Cycle VPUA_Advancement Services

Mission (due 1/20/17)

University Mission

The University of Louisiana at Lafayette offers an exceptional education informed by diverse worldviews grounded in tradition, heritage, and culture. We develop leaders and innovators who advance knowledge, cultivate aesthetic sensibility, and improve the human condition.

University Values

We strive to create a community of leaders and innovators in an environment that fosters a desire to advance and disseminate knowledge. We support the mission of the university by actualizing our core values of equity, integrity, intellectual curiosity, creativity, tradition, transparency, respect, collaboration, pluralism, and sustainability.

University Vision

We strive to be included in the top 25% of our peer institutions by 2020, improving our national and international status and recognition.

College / Department / Program Mission

College Mission

Provide the college mission in the space provided. If none is available, write "None Available in 2016-2017."

Department / Program Mission

Provide the department / program mission in the space provided. If none is available, write "None Available in 2016-2017".

The role of Advancement Services is to provide support and information to various areas of the University. Our primary functions are processing of charitable contributions and pledges to the University and its support organizations; maintaining information on alumni, donors and friends; managing the alumni and donor database; surveying, researching and identifying donor prospects; and providing statistical, demographic and financial reports to authorized departments and individuals.

Assessment Plan (due 1/20/17)

Assessment List (Goals / Objectives, Assessment Measures and Criteria for Success)

Assessment List

Goal/Objective	ERP - Software Conversion from Abila Millennium to Banner Advancement. Involvement of multiple week long site and remote sessions with Ellucian consultants. Mapping of data, clean up data projects, data extractions, completion of online tutorials to learn how to navigate the new system before Go-Live date.
Legends	OO - Outcome/Objective (administrative units);
Standards/Outcomes	
Assessment	

Measures	Assessment Measure	Criterion	Attachments
	Indirect - Data Review (Other)	Review accurate data following conversion to Banner Advancement	
	Indirect - Implement New System (Other)	Completing processes accurately in Banner Advancement	
	Indirect - Reporting in Banner Advancement (Other)	Generate accurate reports from Banner Advancement	

Goal/Objective	Provide the Development Office with an Analytical Tool		
Legends	OO - Outcome/Objective (administrative units);		
Standards/Outcomes			
Assessment Measures	Assessment Measure	Criterion	Attachments
	Indirect - Analytics (Other)	Implement an analytical tool to provide dashboards and reports to visualize data metrics.	

Results & Improvements (due 9/15/17)

Results and Improvement Narratives

Assessment List Findings for the Assessment Measure level for ERP - Software Conversion from Abila Millennium to Banner Advancement. Involvement of multiple week long site and remote sessions with Ellucian consultants. Mapping of data, clean up data projects, data extractions, completion of online tutorials to learn how to navigate the new system before Go-Live date.

Goal/Objective	ERP - Software Conversion from Abila Millennium to Banner Advancement. Involvement of multiple week long site and remote sessions with Ellucian consultants. Mapping of data, clean up data projects, data extractions, completion of online tutorials to learn how to navigate the new system before Go-Live date.		
Legends	OO - Outcome/Objective (administrative units);		
Standards/Outcomes			
Assessment Measures	Assessment Measure	Criterion	

	Indirect - Data Review (Other)	Review accurate data following conversion to Banner Advancement			
	Indirect - Implement New System (Other)	Completing processes accurately in Banner Advancement			
	Indirect - Reporting in Banner Advancement (Other)	Generate accurate reports from Banner Advancement			
Assessment Findings	Assessment Measure	Criterion	Summary	Attachments of the Assessments	Improvement Narratives
	Indirect - Data Review (Other)	Has the criterion Review accurate data following conversion to Banner Advancement been met yet? Met			
	Indirect - Implement New System (Other)	Has the criterion Completing processes accurately in Banner Advancement been met yet? Met			
	Indirect - Reporting in Banner Advancement (Other)	Has the criterion Generate accurate reports from Banner Advancement been met yet? Met			

Assessment List Findings for the Assessment Measure level for Provide the Development Office with an Analytical Tool

Goal/Objective	Provide the Development Office with an Analytical Tool	
Legends	OO - Outcome/Objective (administrative units);	
Standards/Outcomes		
Assessment Measures	Assessment Measure	Criterion
	Indirect - Analytics (Other)	Implement an analytical tool to provide dashboards and reports to visualize data metrics.
Assessment Findings		

Assessment Measure	Criterion	Summary	Attachments of the Assessments	Improvement Narratives
Indirect - Analytics (Other)	Has the criterion Implement an analytical tool to provide dashboards and reports to visualize data metrics. been met yet? Met	A decision to implement an analytical tool has not been decided based on the ongoing changes within University Advancement and the UL Foundation.		

Reflection (Due 9/15/17)

Reflection

1) How were assessment results shared in the unit?

Please select all that apply. If "other", please use the text box to elaborate.

Distributed via email (selected)

Presented formally at staff / department / committee meetings (selected)

Discussed informally

Other (explain in text box below)

2) How frequently were assessment results shared in the unit?

Frequently (>4 times per cycle) (selected)

Periodically (2-4 times per cycle)

Once per cycle

Results were not shared this cycle

3) With whom were assessment results shared?

Please select all that apply.

Department Head (selected)

Dean / Asst. or Assoc. Dean

Departmental assessment committee

Other faculty / staff (selected)

4) What were the measurable or perceivable effects on your current (2016-2017) findings based on prior action plans (created in 2015-2016)?

The conversion from Millennium to Banner Advancement has been completed. All team members in the area of University Advancement have access and have been trained to use Banner Advancement, an integrated software system within the University.

5) What has the unit learned from the current assessment cycle?

A full ERP conversion is very intense and time consuming. The conversion team should have full support and patience from all areas of the department including leadership and peers. Changes in processes and procedures should be put on hold during conversion. Continuous requests to change data while mapping to a new software system causes major issues. Post conversion data projects are to be expected and time to complete these projects should be factored. There is a learning curve to a new system. Expectations to generate high level reporting should be kept to a reasonable standard.

Attachments