FLORIDA STATE UNIVERSITY
INSTITUTIONAL PERFORMANCE AND ASSESSMENT

INSTITUTIONAL EFFECTIVENESS (IE) PORTAL USER GUIDE FOR ADMINISTRATIVE SUPPORT UNITS

August 2023 Edition

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ipa@fsu.edu
[iep.fsu.edu](iep.fsu.edu)

READ THE FULL USER GUIDE STARTING ON THE NEXT PAGE OR SELECT A SPECIFIC TASK TO COMPLETE:

- **How do I get into the IE Portal and access my unit?**
- **How do I add a new or edit an existing Mission Statement?**
- **How do I add a new Program Outcome?**
- **How do I continue or archive an existing Program Outcome?**
- **How do I add a new Assessment Methodology?**
- **How do I edit or retire an existing Assessment Methodology?**
- **How do I add a new Results, Analysis, and Improvements Report?**
- **How do I align my Program Outcomes with the University's Strategic Plan Goals and Initiatives?**
- **How do I navigate to see an overview of a Unit?**
- **How do I view the list of Users who have access to a Unit?**
- **How do I download and save my Unit's IE Assessment reports?**
- **How do I quickly navigate the IE Portal**
- **How do I upload and align supporting documentation for my Program Outcomes?**

How do I get into the IE Portal and Access my Unit?

1. Navigate to the Institutional Effectiveness Portal in Nuventive: iep.fsu.edu.
   Note: the IE Portal may render differently based on the browser used to access it. For best results, we recommend using Google Chrome.

2. Login using your FSU employee credentials (username: fsuid@fsu.edu).
   - If unable to login, email ipa@fsu.edu for support.

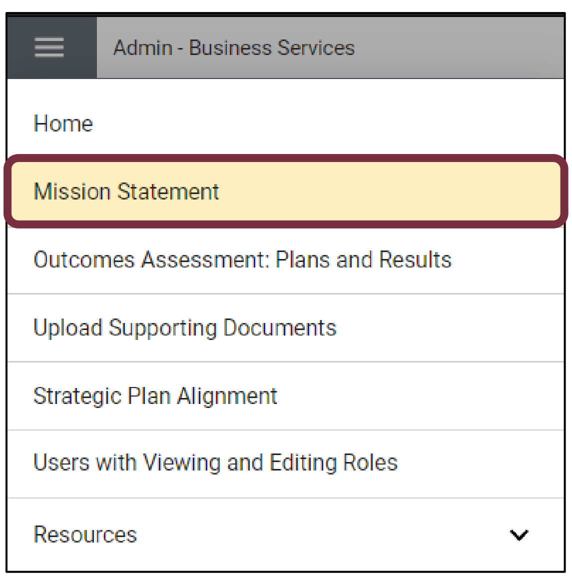
3. Once you have logged in, you will be taken to the home page which provides a brief overview of how to navigate to the page where prior reports are accessible and new reports are submitted, as well as how to access key resources including the IE Portal Quick Guide and Full Assessment Report.

4. On the top of the home page, there is a drop-down menu listing all reporting units (Offices, Departments, Centers, etc.) and summary units (Divisions) that you have access to. Select a single unit to view its Program Outcomes (POs). Note that if you have access to multiple units, you can use the same box to search for a specific unit (for example, type 'Alumni' to find the Alumni Association).

Return to Questions List

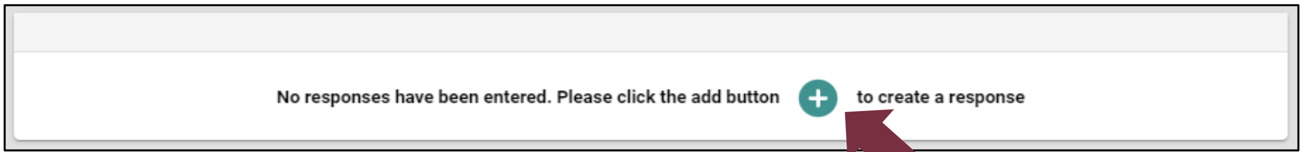
How do I add a new or edit an existing Mission Statement?

1. Once you have selected a reporting unit from the drop-down menu at the top of the page, expand the navigation menu located in the upper left corner of the screen and select **Mission Statement**:

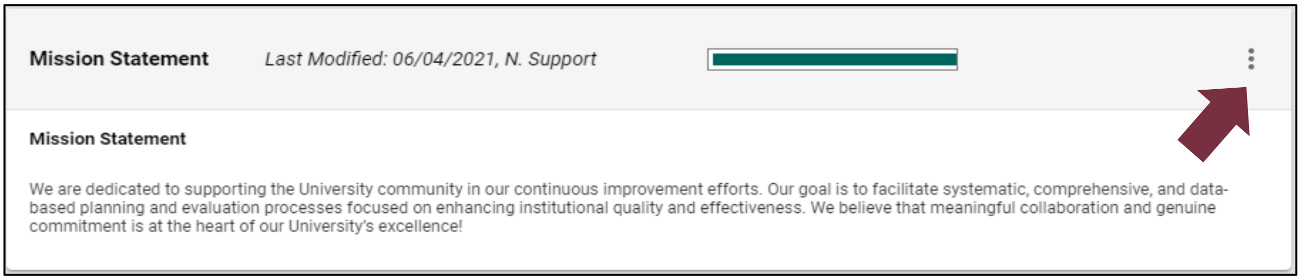


Every Administrative Services reporting unit should have an active and current mission statement. The statement of mission presents the purpose of the unit, the unit's stakeholders, its primary functions, and connection to the University mission.

2. To add a new Mission Statement, click on the add button:



3. To edit an existing Mission Statement, click on the three-dot icon and select **Edit** from the choices:

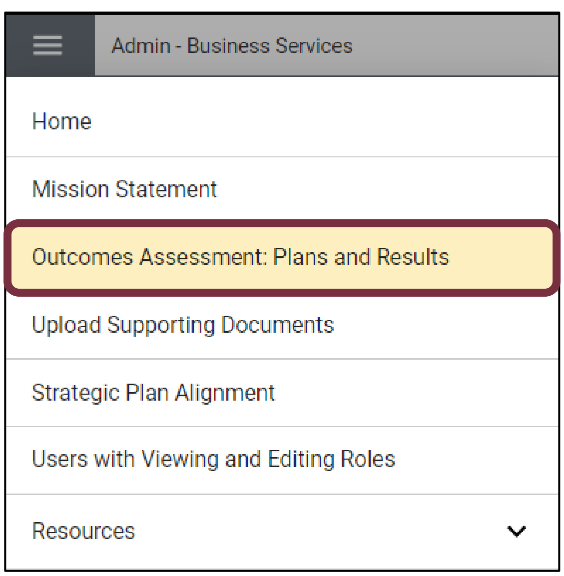


4. When the form opens, enter new or edit existing Mission Statement content in the text box, and click **Save**

Return to Questions List

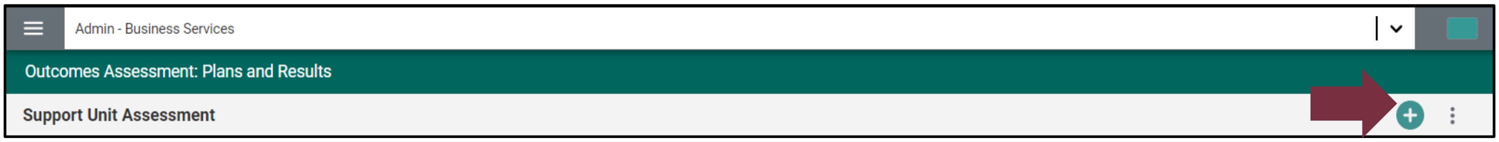
How do I add a new Program Outcome?

1. Once you have selected a reporting unit from the drop-down menu at the top of the page, click the navigation menu ≡ located in the upper left corner of the screen and select **Outcomes Assessment: Plans and Results**:



The Outcomes Assessment: Plans and Results page shows a list of all Program Outcomes under the selected unit, including their Name, Statement, Status, and the Active Cycle(s).

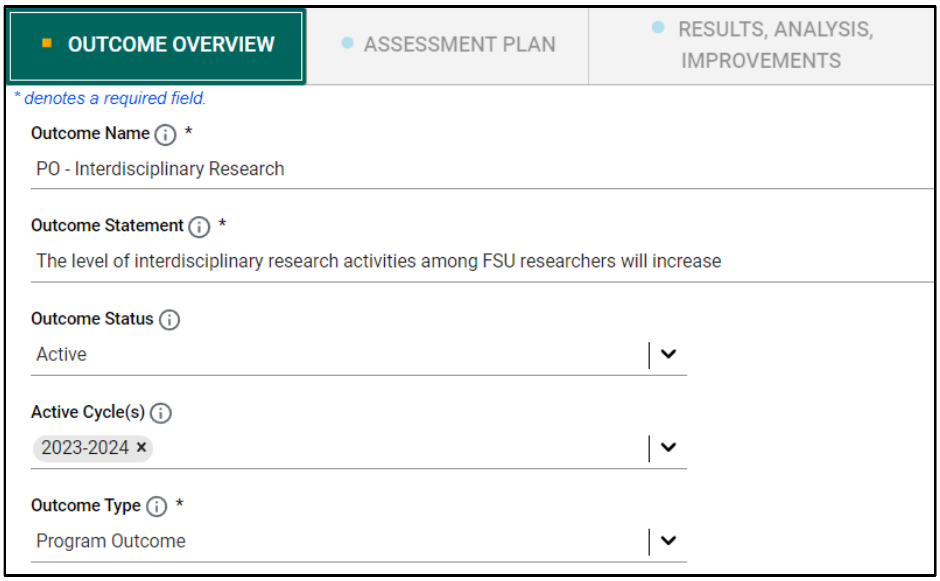
2. Click the green plus icon on the far right of the **Support Unit Assessment header**.



3. Once the blank form opens, enter information into the appropriate fields (completed example and a brief description of each field below).

4. To save the changes to the Outcome, click Save in the upper right corner.

5. Click Close to go back to the listing of all POs for the selected unit.



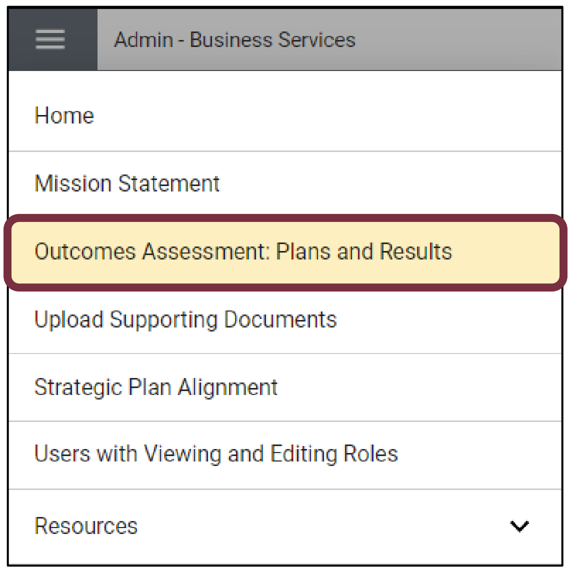
- The **Outcome Name** is the succinct title of the PO. Start the name with "PO – ".
- The **Outcome Statement** is a brief statement of the goal you set for your unit.
- For **Status**, select **Active.**
- In **Active Cycle(s)**, enter the upcoming reporting cycle for which you are entering the Plan details (e.g., if you are reporting the 2023-2024 year results, the next active year would be 2024-2025).
- For **Outcome Type,** select 'Program Outcome'.

Remember to click the **information icons** for more details about what kind of narrative should go in each field and to see examples.

Return to Questions List

How do I continue or archive an existing Program Outcome?

1. Once you have selected a reporting unit from the drop-down menu at the top of the page, click the navigation menu ≡ located in the upper left corner of the screen and select **Outcomes Assessment: Plans and Results**:



The Outcomes Assessment: Plans and Results page shows a list of all Program Outcomes under the selected unit, including their Name, Statement, Status, and the Active Cycle(s).selected unit.

2. Double click anywhere on the card, or click the **Options** icon ⋮ on the far-right side of the Program Outcome's name and select Open

3. To continue pursuing the Program Outcome into the next reporting cycle, the next year should be in the **Active Cycle(s)** field (e.g., if you are reporting the 2023-2024 year results, the next active year would be 2024-2025). The next active year should auto-populate in the **Active Cycle(s)** field in the IE Portal annually.

4. To indicate that you will not be pursuing the Program Outcome anymore, remove the next year from the **Active Cycle(s)** field (e.g., if you are reporting the 2023-2024 year results, the next active year would be 2024-2025), and change the **Status** field from 'Active' to 'Archived'. Do not delete or overwrite any of the content in the other fields; it should be saved for accreditation and other purposes.

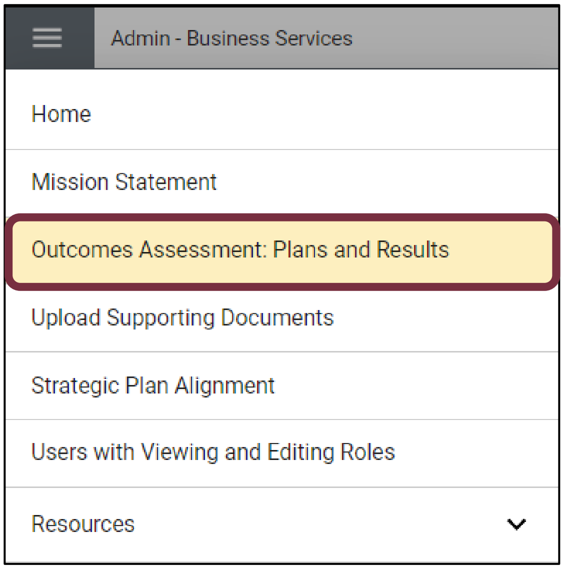
5. To save the changes to the Outcome, click Save in the upper right corner.

6. Click Close to go back to the listing of all Program Outcomes for the selected unit.

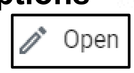
Return to Questions List

How do I add a new Assessment Methodology?

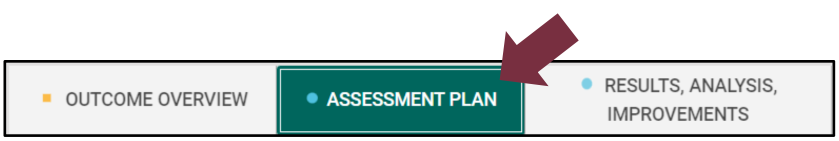
1. Once you have selected a reporting unit from the drop-down menu at the top of the page, click the navigation menu  located in the upper left corner of the screen and select **Outcomes Assessment: Plans and Results**:



The Outcomes Assessment: Plans and Results page shows a list of all Program Outcomes under the selected unit, including their Name, Statement, Status, and the Active Cycle(s).

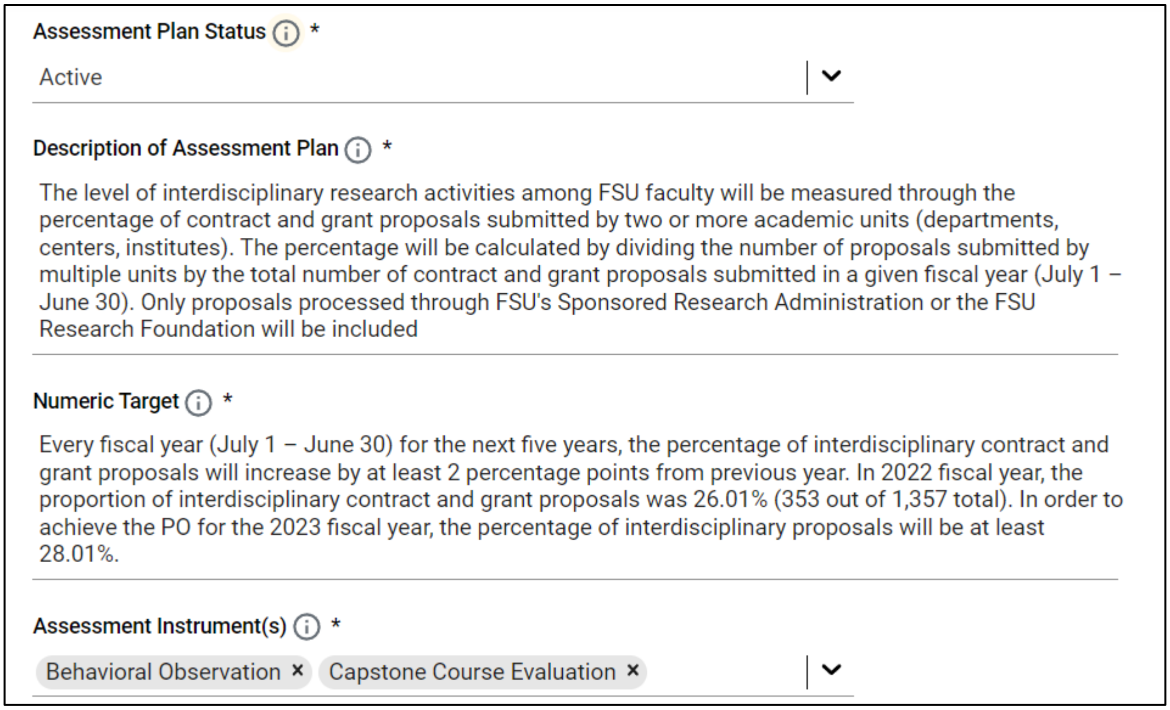
2. Double click anywhere on the card, or click the **Options** icon on the far-right side of the Program Outcome's name and select 

3. Select the **Assessment Plan** tab in the top ribbon.



4. Click the green plus icon  at the end of the tab's header.

5. Enter information into the appropriate fields (see completed example and brief description of each field below).



Assessment Plan Status *

Active

Description of Assessment Plan *

The level of interdisciplinary research activities among FSU faculty will be measured through the percentage of contract and grant proposals submitted by two or more academic units (departments, centers, institutes). The percentage will be calculated by dividing the number of proposals submitted by multiple units by the total number of contract and grant proposals submitted in a given fiscal year (July 1 – June 30). Only proposals processed through FSU's Sponsored Research Administration or the FSU Research Foundation will be included

Numeric Target *

Every fiscal year (July 1 – June 30) for the next five years, the percentage of interdisciplinary contract and grant proposals will increase by at least 2 percentage points from previous year. In 2022 fiscal year, the proportion of interdisciplinary contract and grant proposals was 26.01% (353 out of 1,357 total). In order to achieve the PO for the 2023 fiscal year, the percentage of interdisciplinary proposals will be at least 28.01%.

Assessment Instrument(s) *

Behavioral Observation × Capstone Course Evaluation ×

- Select **Active** for Assessment Plan Status.
- Enter the **Description of Assessment Plan** including details on which measure will be used, why is it an important and suitable metric, how will it be calculated, what is the data source, who will pull data/information and report on progress, and when will those steps take place (make sure the description conforms to the guidelines in the IE Assessment Handbook for Admin Units).
- In the **Numeric Target** field, provide a measurable assessment standard that will be used to define successful implementation of the PO (make sure the description conforms to the guidelines in the IE Assessment Handbook for Admin Units).

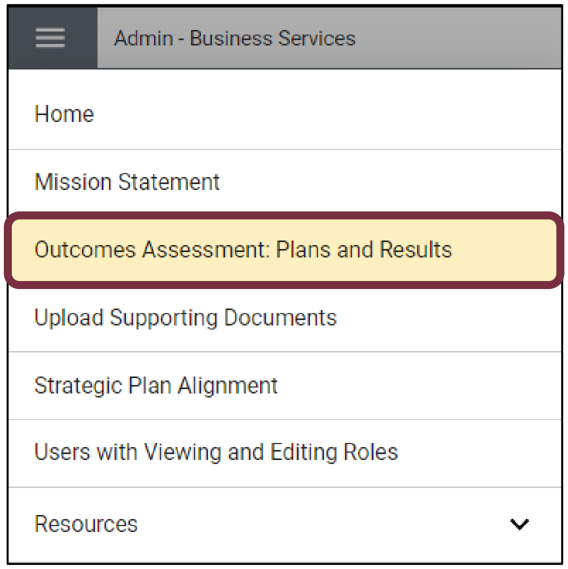
  Note: If you choose to increase or lower the numeric target, record the changes in this field and note the applicable timeframe, do not overwrite existing content.
- You have an option to indicate which **Assessment Instrument** you will be using to measure the PO. If it is present on the list, simply select it. Otherwise, do not select any.

6. To save the new assessment methodology, click Save in the upper right corner.
7. Click Close to go back to the listing of all POs for the selected unit.

Return to Questions List

How do I edit or ‘retire’ an existing Assessment Methodology?

1. Once you have selected a reporting unit from the drop-down menu at the top of the page, click the navigation menu located in the upper left corner of the screen and select **Outcomes Assessment: Plans and Results**:



The Outcomes Assessment: Plans and Results page shows a list of all Program Outcomes under the selected unit, including their Name, Statement, Status, and the Active Cycle(s).

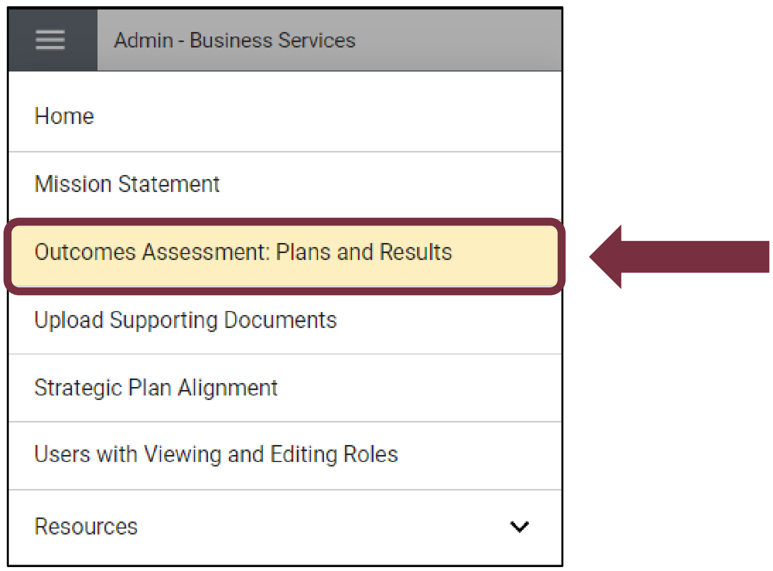
2. Double click anywhere on the card, or click the **Options** icon on the far-right side of the Program Outcome’s name and select Open
3. Select the Assessment Plan tab in the top ribbon.

4. Open the Assessment Plan you want to update by double clicking anywhere on the card, or click the **Options** icon on the far-right side of the card and select Open
5. To ‘retire’ an existing assessment methodology, uncheck the **Active** box.
6. To make minor edits to the Description of Assessment Plan or Numeric Target, simply add the details to the existing narrative. You should never delete or overwrite existing content. If you are increasing or lowering the previous Numeric Target, record the new Numeric Target and note the applicable timeframe (for example, “Beginning with 2023-24 reporting cycle, the goal is…”). If you are changing key aspects of the Assessment Plan for the next reporting cycle, you should create a new Assessment Plan form and mark the existing as Inactive.
7. To save the updates to the assessment methodology, click Save in the upper right corner. To go back to the listing of all Program Outcomes for the selected unit, click Close .

Return to Questions List

How do I add a new Results, Analysis, and Improvements Report?

1. Once you have selected a reporting unit from the drop-down menu at the top of the page, click the navigation menu located in the upper left corner of the screen and select **Outcomes Assessment: Plans and Results**:



The Outcomes Assessment: Plans and Results page shows a list of all Program Outcomes under the selected unit, including their Name, Statement, Status, and the Active Cycle(s).

2. Double click anywhere on the card, or click the **Options** icon on the far-right side of the Program Outcome's name and select Open

3. Select the Results, Analysis, Improvements tab from the top ribbon.

4. Click the green plus icon at the end of the Assessment Plan ribbon.

5. Enter information into the appropriate fields (see completed example and brief overview of each field below).

Results Statement Date ⓘ *

08/03/2023

Reporting Cycle ⓘ *

2022-2023

Location/Modality ⓘ *

TLH F2F

Conclusion ⓘ *

Criteria Met

Results Statement ⓘ *

This past fiscal year 2022 (July 1, 2022 – June 30, 2023), percentage of contract and grant (C&G) proposals submitted by two or more units was 28.38%. Out of total 1,265 proposals submitted this past year, 359 were interdisciplinary. For comparison, in fiscal year 2022, the percentage of interdisciplinary C&G proposals was 26.01% (353 out of 1,357 total). So, the goal to increase the PO by at least 2 percentages was achieved.

How Did Last Year's Improvement Action(s) Impact These Results? ⓘ

We believe that the increase in interdisciplinary C&G proposals is largely due to the Collaborative Collisions interdisciplinary networking events that have been hosted by our Office of Research Development over the last three years. Four well-attended Collaborative Collision events were held last academic year. They resulted in over 50 proposals submitted by researchers from different academic units.

Analysis of Results ⓘ *

Although the increase was over the planned 2 percentage points, the number of interdisciplinary proposals did not increase by much (353 in FY 2022 and 359 in FY 2023). The percentage increased because the overall number of submitted proposals decreased (1,357 in FY 2022 and 1,265 in FY 2023), which decreased the denominator in percentage calculations.

Description of New and/or Different Improvement Action(s) To Be Implemented This Year ⓘ *

In order to continue growing the percentage (and also number) of submitted interdisciplinary C&G proposals, we will work in two main directions. First, we will continue hosting Collaborative Collision networking events and will increase their frequency from 4 per year to 6 per year. The two additional events will be focused on topics that were requested by many FSU researchers. One event on "Big Data" will be added to the summer schedule and another event on "Children and Families" will be added to the fall schedule. Second, we want to establish a Collaborative Collision seed fund and have already submitted a budget request for it. The seed fund will provide grants of up to $20,000 for interdisciplinary research projects. The grants are intended to allow teams to position themselves to seek external funding for a new research initiative by demonstrating a history of successful collaboration.

- Enter the **Results Statement Date** for your Results Statement. It will default to the current day of access, but you can choose a different calendar date if necessary.
- In the **Reporting Cycle** field, select the academic/fiscal year for which you are reporting results. In most cases, it will be the academic/fiscal year that just ended.
- For **Location/Modality**, select which FSU campus your Administrative unit is a part of. If you are reporting for multiple locations, you should enter separate Results Section entries for each of them (do not report data for multiple locations in one form).
- If reported results meet or exceed the Numeric Target you set for this PO, please select "Criteria Met" in the **Conclusion** drop-down menu. If not, select "Criteria Not Met". The "Inconclusive" option is reserved for situations when there is insufficient information/data to draw conclusions. The "Criteria Partially Met" is for when the Numeric Target has multiple goals or benchmarks, only some of which were met.
- Enter the **Results Statement** by specifying quantitative information regarding the levels at which the PO was achieved (e.g., headcounts, percentages, tallies, dates/semesters, dollar amounts, etc.) as well as a comparison to last reporting cycle'(s') results (ensure the description conforms to the guidelines in the IE Assessment Handbook for Admin Units).

- Provide a response for '**How Did Last Year's Improvement Action(s) Impact These Results'** by explicitly stating whether those changes indicated last reporting cycle were indeed implemented as planned and whether they had the intended positive effect.
- Enter the **Analysis of Results** by examining the reason(s) why the Outcome was attained at this particular level and reporting on any trends (ensure the description conforms to the guidelines in the IE Assessment Handbook for Admin Units).
- Enter your **Description of New and/or Different Improvement Action(s) To Be Implemented This Year** to address any issues described in the Analysis of Results. This field may include small-scale enhancements or significant changes in your unit's operations to improve the PO (ensure the description conforms to the guidelines in the IE Assessment Handbook for Admin Units).

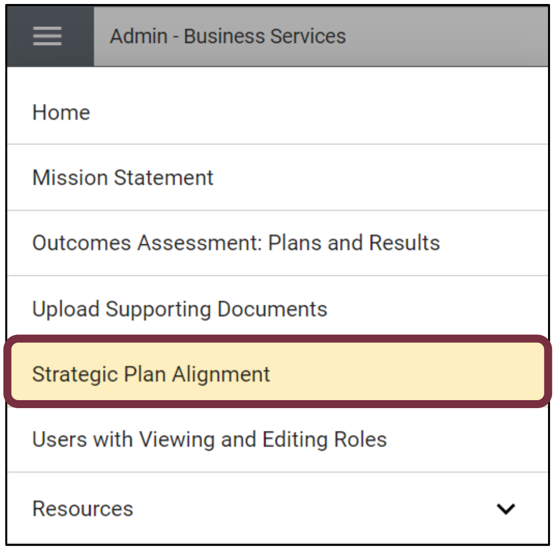
6. To save the report, click Save in the upper right corner.
7. Click Close to go back to the listing of all Program Outcomes for the selected unit.

Return to Questions List

How do I align my Program Outcomes with the University's Strategic Plan Goals and Initiatives?

Program Outcomes must be connected to the institutional goals as they are outlined in the FSU Strategic Plan. In addition, the Goals and Initiatives of the FSU Strategic Plan and units' Program Outcomes should be in alignment with budgetary decisions and resource allocation.

1. Once you have selected a reporting unit from the drop-down menu at the top of the page, expand the navigation menu ≡ located in the upper left corner of the screen and select **Strategic Plan Alignment**:



The Strategic Plan Alignment page contains a table listing all Strategic Plan Goals & Initiatives as rows and all the Unit's Program Outcomes as columns.

2. Select the boxes where each Program Outcome directly or indirectly supports the Strategic Plan Goals and Initiatives.

   NOTE:

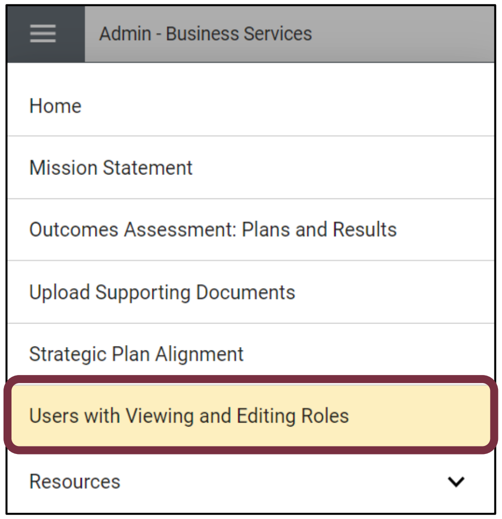
   - ✓ Each PO should have 1-3 selections.
   - ✓ Only active (i.e., not archived) Program Outcomes need to be aligned.
   - ✓ New Program Outcomes only need to be aligned to the Initiatives in the 2023-2027 Strategic Plan Goals and Initiatives list (use drop-down menu in top left corner of page to swap between the prior and current Strategic Plan).

3. To save the alignment, click Save in the top right corner.

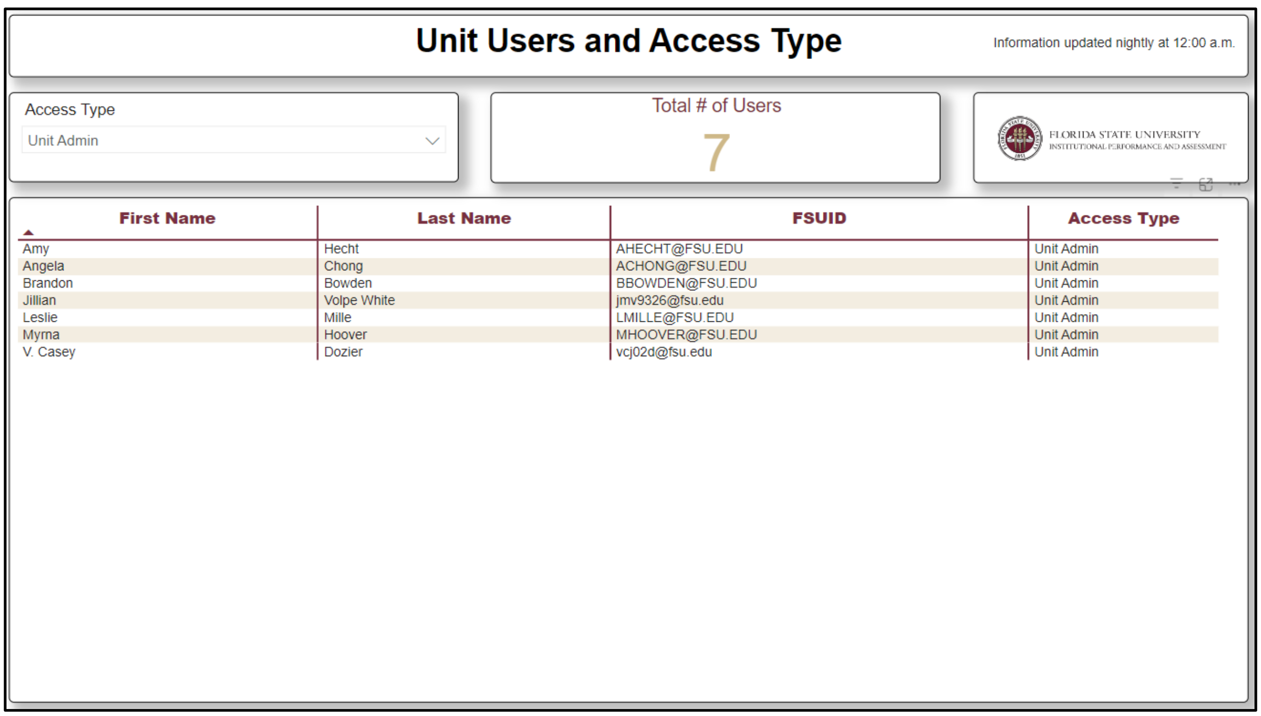
Return to Questions List

How do I view the list of Users who have access to a Unit?

1. Once you have selected a reporting unit from the drop-down menu at the top of the page, expand the navigation menu located in the upper left corner of the screen, then select **Users with Viewing and Editing Roles**:



The Unit Users and Access Type table provides the name, FSUID, and access type for all users with access to the reporting unit. Unit Admins can view and edit content, while Read Only users can only view the content. Power Users have access to all university units.

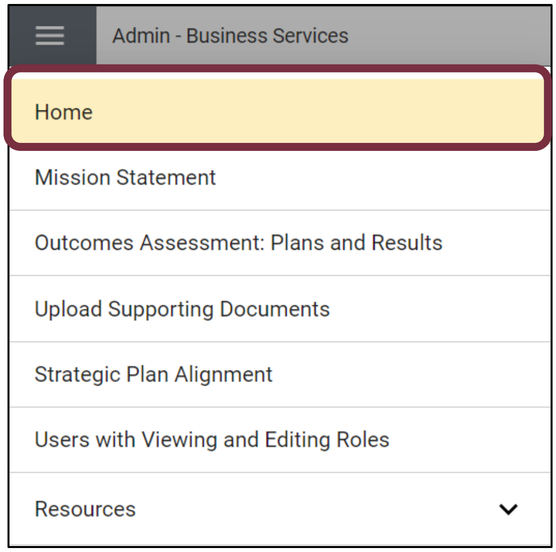


First Name	Last Name	FSUID	Access Type
Amy	Hecht	AHECHT@FSU.EDU	Unit Admin
Angela	Chong	ACHONG@FSU.EDU	Unit Admin
Brandon	Bowden	BBOWDEN@FSU.EDU	Unit Admin
Jillian	Volpe White	jmv9326@fsu.edu	Unit Admin
Leslie	Mille	LMILLE@FSU.EDU	Unit Admin
Myrna	Hoover	MHOOVER@FSU.EDU	Unit Admin
V. Casey	Dozier	vcj02d@fsu.edu	Unit Admin

Return to Questions List

How do I download and save my unit's IE Assessment reports?

1. Once you have selected a reporting unit from the drop-down menu at the top of the page, expand the navigation menu located in the upper left corner of the screen and select **Home**:

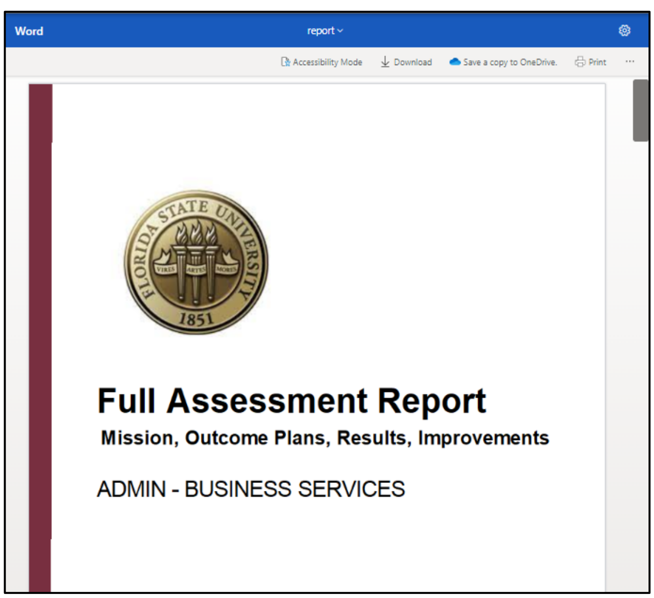


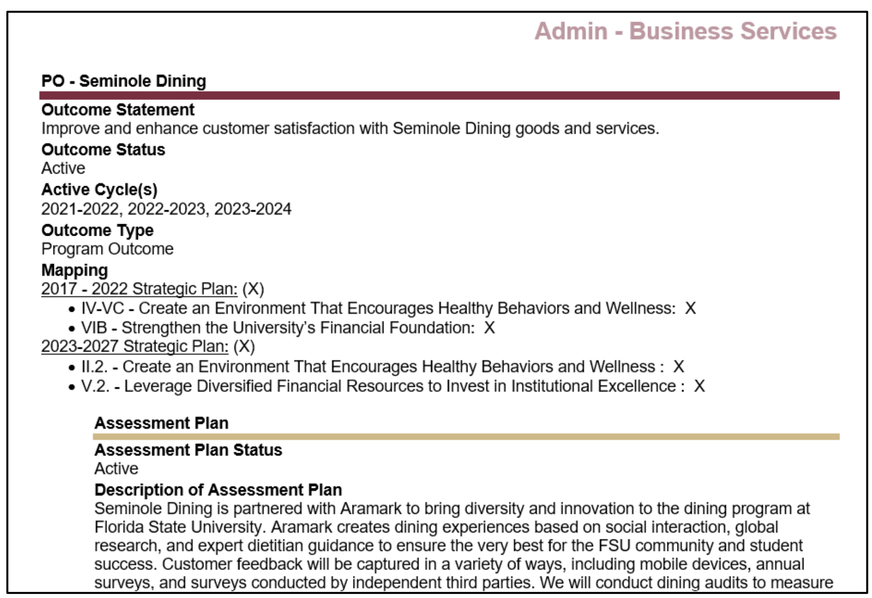
On the Home page, and all other pages in the IE Portal, you can view and export the assessment reports for the unit you have selected by accessing the Full Assessment Report in the Resources Panel on the right side of the page.

2. In the right-hand side of the screen, click on **Full Assessment Report**.

3. Once selected, you can customize your unit's report by changing any of the available filter options or use the default settings.

4. To view the report, click on Run Report in the upper right corner of the side-panel.




Admin - Business Services

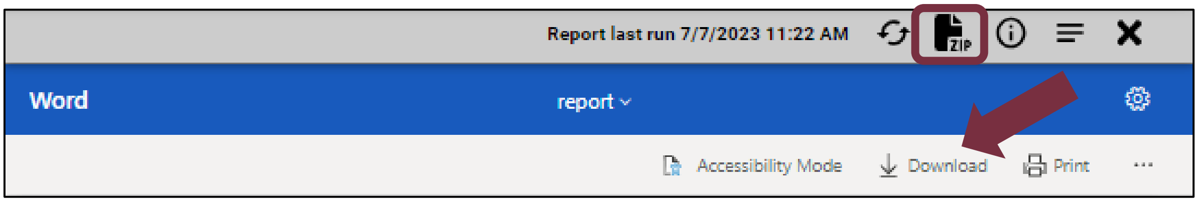
PO - Seminole Dining

Outcome Statement
Improve and enhance customer satisfaction with Seminole Dining goods and services.
Outcome Status
Active
Active Cycle(s)
2021-2022, 2022-2023, 2023-2024
Outcome Type
Program Outcome
Mapping
2017 - 2022 Strategic Plan: (X)
- IV-VC - Create an Environment That Encourages Healthy Behaviors and Wellness: X
- VIB - Strengthen the University's Financial Foundation: X

2023-2027 Strategic Plan: (X)
- II.2. - Create an Environment That Encourages Healthy Behaviors and Wellness : X
- V.2. - Leverage Diversified Financial Resources to Invest in Institutional Excellence : X

Assessment Plan
Assessment Plan Status
Active
Description of Assessment Plan
Seminole Dining is partnered with Aramark to bring diversity and innovation to the dining program at Florida State University. Aramark creates dining experiences based on social interaction, global research, and expert dietitian guidance to ensure the very best for the FSU community and student success. Customer feedback will be captured in a variety of ways, including mobile devices, annual surveys, and surveys conducted by independent third parties. We will conduct dining audits to measure

5. To extract the report, the simplest method is to click on **Download** in the upper right corner of the side-panel. Note: to download both the report and any supporting documentation, click on the **Zip** icon above download.



Return to Questions List

How do I quickly navigate the IE Portal?

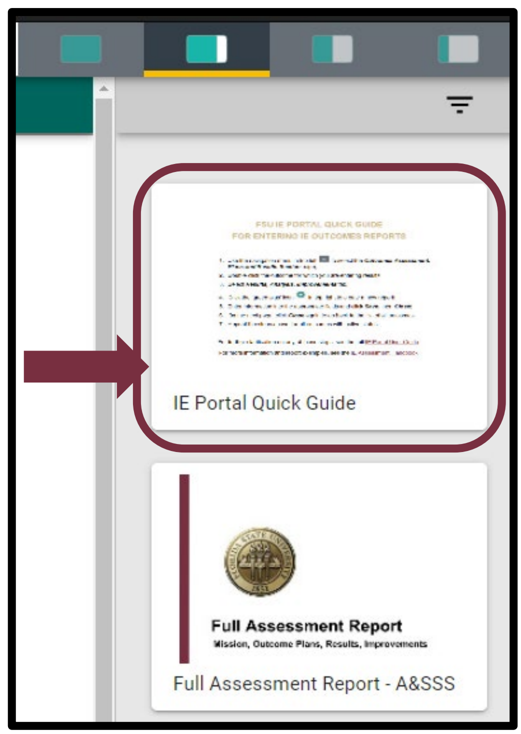
On the right-hand side of all pages in the IE Portal, across the top are icons for the different side-panel viewing options, including the default minimized panel, split screen, focus, and hiding the panel. The right-side panel contains two key documents, one of which is the IE Portal Quick Guide. This one-page guide succinctly describes the main tasks of entering the assessment report in the system.

1. Locate the panel on the right-hand side of any page in the platform.

2. Click on the document titled **IE Portal Quick Guide**.

3. Once you select the document, the view will automatically adjust to split screen with the guide and the content on the page you were already accessing.

4. Follow the guide to quickly navigate the IE Portal.

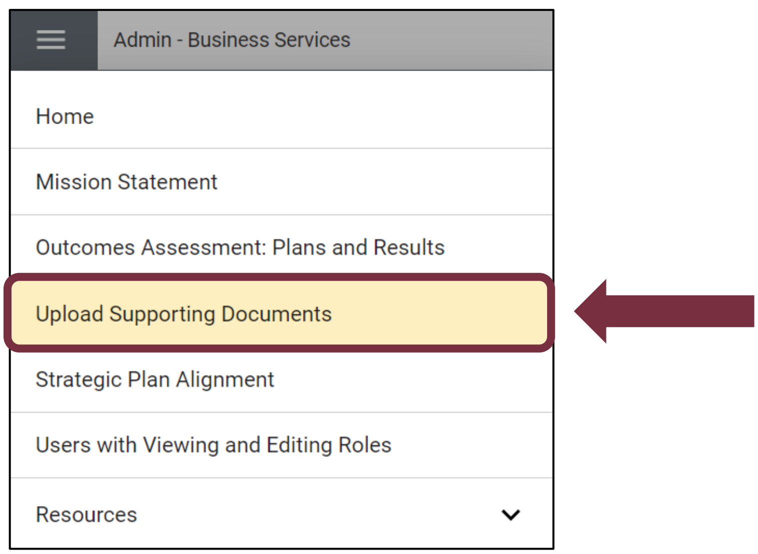


Return to Questions List

How do I upload and align supporting documentation for my Program Outcomes?

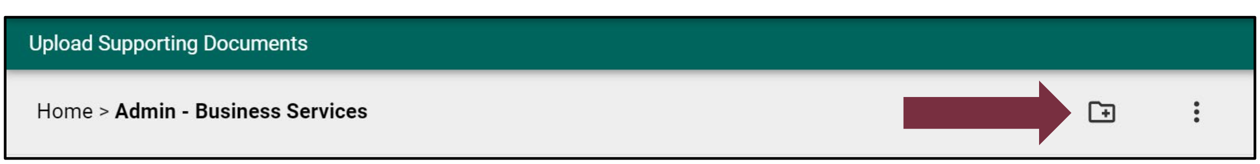
As supporting documentation provides evidence of continuous improvement efforts and is required by accrediting bodies, each unit is strongly encouraged to include these files when available. In the Plans Section, these documents may pertain to the assessment methodology, such as copies of the assessment instrument (survey questions, evaluative rubric, etc.) and data tables and graphs related to setting the goal/benchmark. In the Results Section, relevant supporting documentation may include data tables and visuals/graphics showing the results, minutes/notes from the unit's meeting(s) where results were analyzed and discussed, or department memos announcing changes to support improvements.

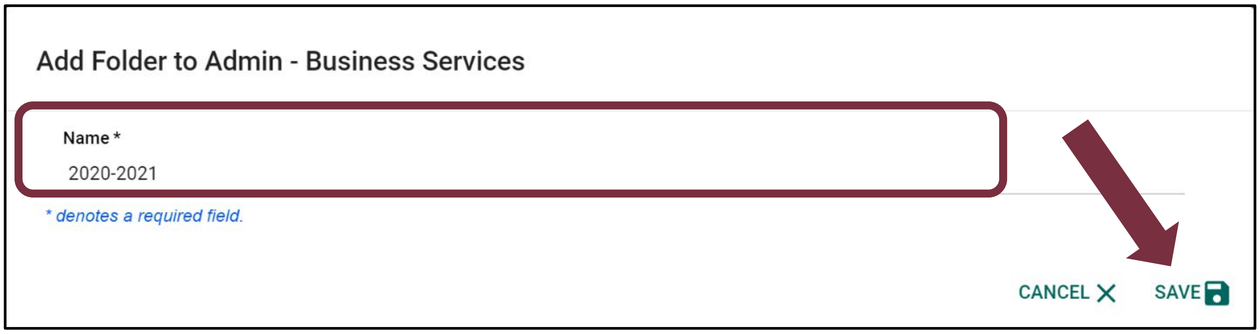
1. Once you have selected a reporting unit from the drop-down menu at the top of the page, expand the navigation menu located in the upper left corner of the screen and select **Upload Supporting Documents**:



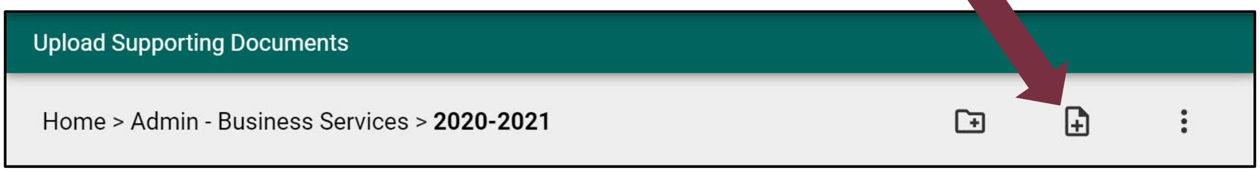
The Upload Supporting Documents page contains a document repository for the selected reporting unit where you can upload and organize supporting documentation that you want to link in the reports on the Outcomes Assessment: Plans and Results page.

2. To add a folder, select the icon in the upper right corner of the page. It is good practice to organize documentation by reporting period.

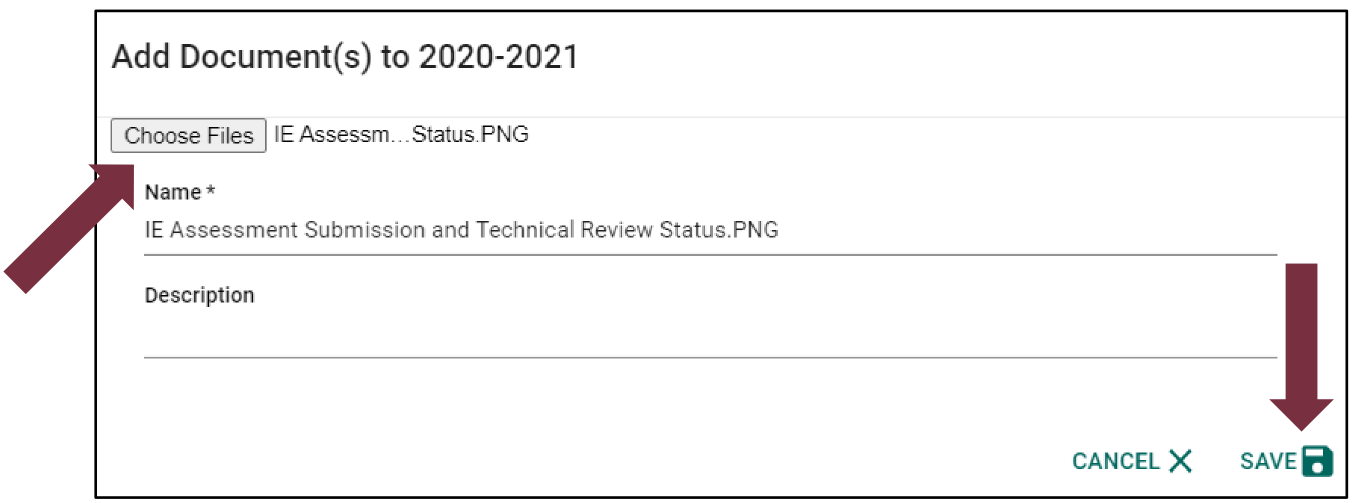




3. Select a folder to open and click on the icon in the upper right corner of the page.



4. Click on ‘Choose Files’, locate the document(s) you want to upload and click SAVE



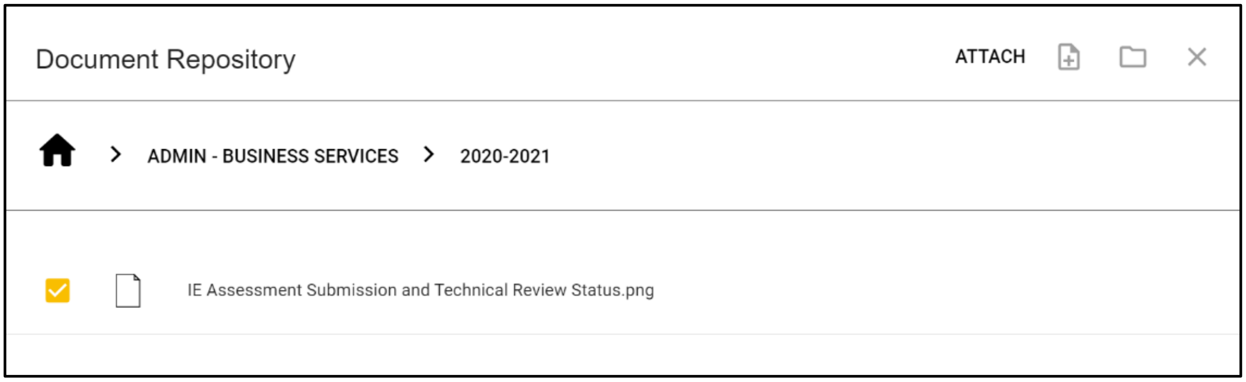
5. Use the Navigation Menu located in the upper left corner of the screen and select the **Outcomes Assessment: Plans and Results** page.

6. Double click to select a specific Program Outcome and navigate to its Assessment Plan or Results, Analysis, Improvements tab where you want to relate a document.

7. Either double click on an existing, or create a new report, and locate the **Link Documents** section.

8. Click on the green plus icon at the end of the section header.

9. In the ‘Document Repository’, locate the document(s) using the folders and select the checkbox to left of the item(s).



10. Click on ATTACH in the upper right corner of the document repository pop-up to relate and save the supporting documentation.

Return to Questions List

If you experience any difficulties with this process, please reach out to ipa@fsu.edu with request for assistance.