

Weave Education Non-Academic Assessment User Guide

A STEP-BY-STEP REVIEW OF COMPLETING UNIT LEVEL ANNUAL REPORTS USING THE WEAVE INTERFACE.
NON-ACADEMIC ASSESSMENT COMMITTEE

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Section I: Accessing Weave

Logging into Weave

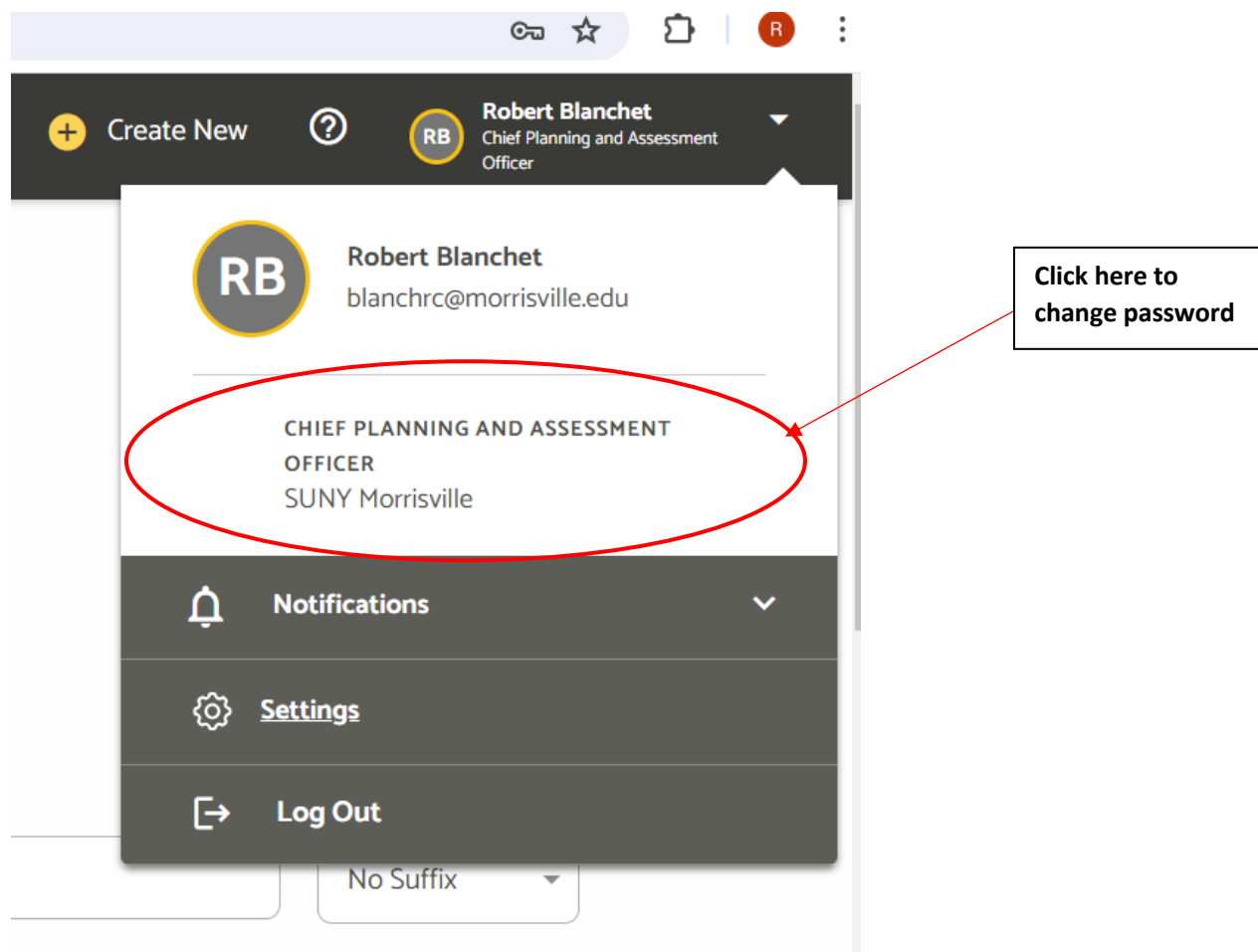
1. To access Weave, go to the SUNY Morrisville Assessment webpage or by entering <https://app.weaveeducation.com/dashboard> into your search browser.

Logging in the first time

2. Your Username is your Morrisville email address. When logging in for the first time, select the “Forgot Password” link to create your Weave password. You will receive an email from weaveeducation.com shortly after submission. Follow the email instructions to finalize the login process.
 - a. If the “Forgot Password” option does not work, you may still need to have an account created on Weave. Please contact the Assessment and Planning Office to have your account created.

Changing your password

3. Once you have logged into Weave, you can change your password by selecting your name in the upper right corner of the webpage. Next, select your title. It will be as listed above “Notifications” (see illustration below).
4. At the bottom of the page, select Change Password. A dropdown will appear for you to enter and confirm your new password, then select save.



Section II: End of current Assessment Cycle and Editing Your Weave Project

Your Weave Project

1. To access your pre-created or saved Projects, select “Project” in the menu at the top of the page.
2. Your Annual Report project name will begin with your school or division initials, followed by your department, your program and then the name of your Project.

For example:

- a. Administration and Finance: AF Technology Service Annual Report = Division of Administration and Finance, Technology Services.

- b. If you do not see any projects listed, you may not be added to any yet. Please ask your divisional Weave liaison or the Office of Planning and Assessment to add you to the Project you are seeking.

Projects

Projects

Projects (17)

View: Administrative Plan, 2023-2024 ▼

Search

PROJECT ▲▼

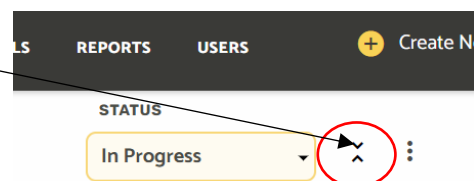
EM - Admissions Office Annual Report

AF - Technology Services Annual Report

AF - Facilities Management Annual Report

3. Select your unit Project name to view your 2023-24 unit plan.
4. When you load your saved Project, you may need to change the “view” to “Outline View” to update and complete your annual report. You may toggle the view using the provided arrows. < >
5. You can click “Expand All” in the top right corner to view everything or click the triangle on the right of section to expand that section.
6. Click on the section you wish to edit to type. The section will save when you click out of it.

Expand All



Mission Statement

7. Enter the Mission Statement for your office or department.

AF - Facilities Management Annual Report 2023-2024 In Progress

Projects > Administrative Plan > AF - Facilities Management Annual Report > 2023-2024

Institution Mission

DESCRIPTION

We cultivate a community of learners rooted in experiential education.

Department Mission

DESCRIPTION

Enter text

Adding Team Members

8. You manage who has access to your Project.
To add users to your Project Team, go to the Team box in the lower left corner. In the gray box, labeled "Add team member" begin typing the name of the user you would like to add. Click on the name once it appears. Once you click out of the Team box, the users will be saved.
9. If you try to add a user, but they do not appear as you type their name, they need to be added to the Weave system. Please contact the Planning and Assessment Office to request a new user be added to Weave.

AF - Facilities Management Annual Report

Projects > Administrative Plan > AF -

Team (2)

Add Team Member

SEARCH

VIEW BY: ALL

ADMINISTRATORS (2)

Institution Mission

DESCRIPTION

We cultivate a community of

Department Mission

DESCRIPTION

End of current year Assessment Cycle

1. The end of the current year assessment when you review current year objectives, assess outcomes, and submit your current year annual report. To do this, you will need to review each of the Objectives (also referred to as an "outcome") using the established "Measures" and "Targets". For non-academic areas, this part of the cycle will occur at the end of each academic year. Your current year annual report will be submitted after completing the "Finding" and, if necessary, "Action Plan" sections for each Objective. This will also close you the "assessment cycle" for the current year.

Measures

- Under each of your Objectives, you may view the Target and Finding fields within the Measure section by selecting the down arrow next to each measure. The target listed were imported from the 2023-24 annual report submitted by the unit head last year.
- If there is not a measure listed for 2023-24, you will need to input one by clicking on the “+” field. Measures should be “measurable”, so be sure to only list items (surveys, dates of completion, performance measures, etc.) that will help you understand the degree to which your unit performed relative to the objective. Likewise, targets should be achievable performance indicators within the context of the measure.

Target and Findings

- Select the drop down arrow next to each target to enter findings.
- Complete the “Finding” and “Analysis” sections after you have reviewed or inputted measures/targets for the Objective. This usually happens by the end of the academic year (June 30), but may also extend to October if fall enrollment census data is being used as a measure. The “Finding” textbox should include a brief summary of the selected Target outcome and the “Analysis” textbox should go into more detail about your Findings.
- After completing your Findings, under Target, select the “Status” drop down to select an achievement status of the Target. The options for Achievement Status are: Nothing Entered, Not Reported in this Period, Not Met, Partially Met, Met, & Exceeded.

Action Plans

- f. Under each of your Objectives, you will find the Action Plan section below “Supported Initiatives”
- g. An Action Plan should only be created for each Outcome/Objective that has a *Target that is Not Met or Partially Met*.
- h. When developing an Action Plan, it helps to first review your Findings. Think about what you want to do next cycle (academic year) now that you have information; think “now what”. For example, so you didn’t meet your target of a 50% response rate on an important survey. What are you going to do next cycle to improve this response rate?
- i. Your response to “now what” is what you enter into the Action Plan section.
 - i. Enter a description that summarizes what you will do next year to increase the likelihood of meeting one or more of the objective targets next year.
 - ii. Ignore the Budget Source section (for now).
 - iii. Enter one or more action items. An action item is a specific tactic that you will employ designed to enhance the likelihood of meeting this target next year (i.e. develop a texting communications plan to increase survey response rate).
 - iv. Change action item status to “Planned”. The Non-Academic Assessment Committee will review and provide feedback after submitting your annual report. Once feedback is received and considered, you may update the status to “In Progress”.

The screenshot shows the 'Action Plan' form interface. The form is titled 'Action Plan' and has a dropdown arrow. It contains several input fields: 'DESCRIPTION' (circled in red), 'BUDGET SOURCE' (with 'Enter text' below it), 'AMOUNT' (with '\$0.00' below it), 'DUE DATE' (with '--/--/----' below it), and 'STATUS' (a dropdown menu). Below these fields is a red circle around a '+ ADD ACTION ITEM' button. At the bottom, there is a table header with columns: 'ACTION ITEMS (0)', 'CREATED', 'DUE', and 'STATUS'.

Updating the Annual Report Project Status

2. In the upper right area of the screen next to the assessment period, you will see a box that says “Set Project Status.” Click on that box to set the status of your Project to “Internal Review.”
 - a. Project Status Definitions:
 - i. Not Started: all projects start with this status until content is added.
 - ii. In Progress: Update your project to this status when content is added.
 - iii. Internal Review: Update your response to this status to let your team know that it’s complete and ready for internal review.

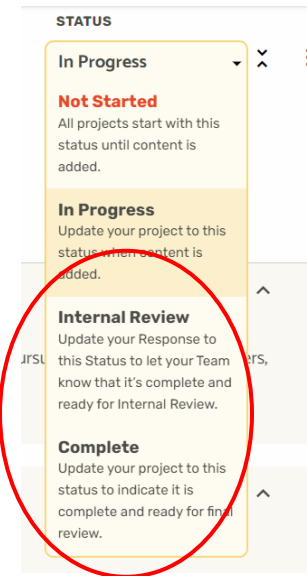
- iv. Complete: Update your project to this status to indicate it is complete and ready for final review.

Project Status: Internal Review

3. Once you change the project status to “Internal Review”, the Non-Academic Assessment Committee will review your assessment project and provide recommendations.

Project Status: Complete

4. After reviewing the Non-Academic Assessment Committee recommendations, you may update (or not) your project status to “Complete” to finish the 2023-24 assessment report and submit for final review. The provided goals, objectives, measures, and targets will then be used to calculate progress toward meeting Morrisville’s strategic objectives and to inform the development of the SUNY Morrisville Annual Report.



Section III: Creating next years’ Annual Report Assessment Cycle for your Weave Project

Annual reports are not automatically rolled into the next cycle year. Someone from each unit must roll the Project forward after completing the current year’s project.

Review prior to creating new cycle for your Weave Project

1. Your Project’s content, including Team Members and Project attachments that exists at the time you duplicate the Project will carry into the next year cycle.
2. Supported Initiatives are not carried forward and need to be added individually to each Project at the Objective level.
3. When an Assessment project is duplicated with a new reporting period, only the content that currently exists in the older project is carried over, content entered into the older project after it has been duplicated will not carry into the newer project.
4. Please confirm with your Project’s Team Members that they are ready for you to create a new cycle for your Weave Project.

Creating a new cycle

5. Once you login, click “+Create New” near the top right corner of the page and select “Administrative Plan.”
6. When prompted with “What type of project is this?” select the bubble next to “New version of an existing project.”

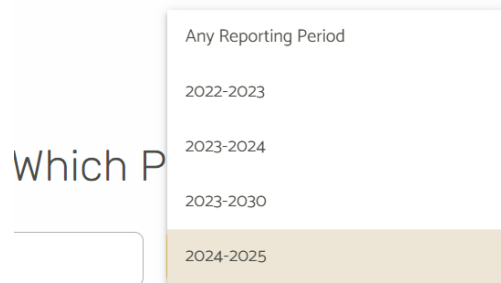
What type of Administrative Plan is this?

- New Administrative Plan
 Create using an existing Project

Back

Next

7. A list will appear under “Which Project?” Select the project you want to create a new cycle for. Select “Next”.
8. **DO NOT** change the name of your Project.
9. Select **2024-2025** from the drop down menu under “Reporting Period”.
10. Your 2023-2024 Project will then be duplicated in the 2024-2025 reporting period.
11. You can now toggle between cycle years by clicking the years next to your Project’s name.
12. Make sure you are in the correct cycle year before you start updating your Project.
13. For now, you will be able to edit both the 2023-2024 and 2024-25 cycles. Eventually, editing will be turned off for 2023-2024.

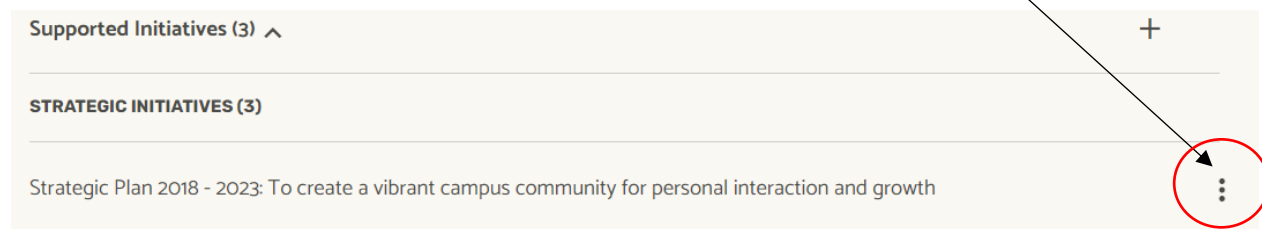


Review and update unit goals, objectives, measures, and targets for the new 2024-25 cycle

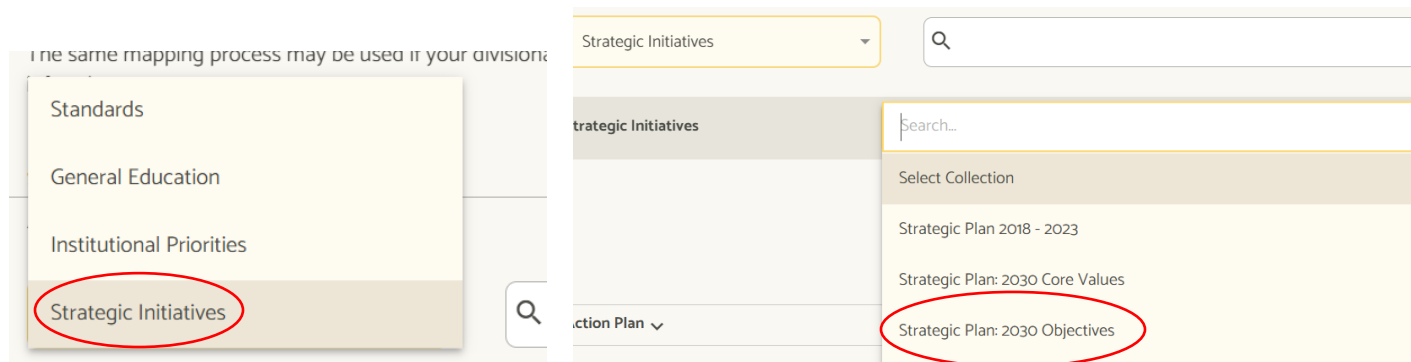
1. Review the prior year goals and determine if they are still relevant. You may want to make updates to ensure the goals accurately represent a functional responsibility of your unit.
2. Review the prior year objectives to ensure they are 1) measurable, 2) achievable, and 3) are in alignment with the goal.
 - a. In most cases, after this initial Weave set up, you will not likely change the goals or objectives of your annual report project often.
3. Review the prior year measures. Is the measure in fact “measurable”? Can you assign a target using this measure?
 - a. If so, review the prior year targets and update to reflect what success will look like for this objective in the coming year.
 - b. If not, update the measure so the selected targets may be objectively assessed (it can be date/deadline oriented if your unit does not have available metrics).
 - c. In most cases, you will likely change your unit measures and goals annually.

Mapping unit objectives

4. Map each unit objective to the new Strategic Plan: 2030 and remove mapping to old strategic plan (Strategic Plan 2018 – 2023).
 - a. Remove the “Strategic Plan 2018- 2023” mapping by selecting the 3 vertical dots next to each of the “Strategic Initiatives”.

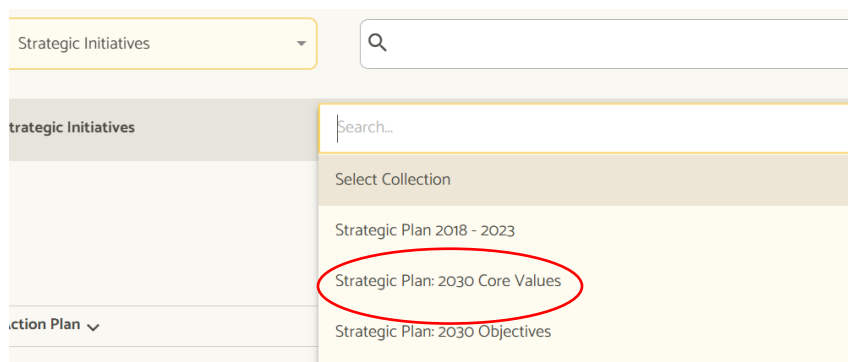


- b. Insert one or more of the “Strategic Plan: 2030” Objectives by selecting the plus (+) symbol next to “Supporting Initiatives”. Next select “Strategic Initiatives”, then select the Strategic Plan Objective(s) that aligns best with the Objective.



5. Next, map each objective to one or more institutional Core Values and Beliefs.

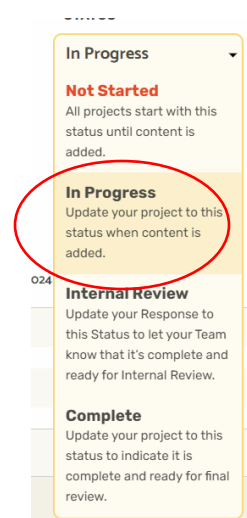
- a. You may insert one or more institutional “Core Values and Beliefs” by selecting the plus (+) symbol next to “Supporting initiatives”, then selecting “Strategic Initiatives”, then selecting “Strategic Plan: 2030 Core Values”.



NOTE: If you are not sure how your unit objective should map to the strategic plan, please refer to the **“Assessment Mapping Guide”** within the appendices for more information. You may also contact your Non-academic Assessment divisional liaison or the Planning and Assessment Office for additional guidance.

Update project setting to “In Progress”

Update the 2024-2025 Project Status from “Not Started” to “In Progress” to submit your goals, objectives, measures, and targets for the 2024-2025 assessment cycle.



Appendices

Non-Academic Assessment Committee members and liaisons

Name	Title	Divisional Area
Beth Ackman	Director of Residential Life	Student Affairs
Robert Blanchet	Chief Planning and Assessment Officer	Chair
Susan Cornelius	Director of Finance	Administration and Finance
Sarah Mazza	Director of Human Resources – MAC	MAC
Courtney Turner	Director of Annual Giving	Institutional Advancement and Enrollment Management
Brenda Oursler White	Special Assistant to the Provost	Academic Affairs

2024 Annual Report Timeline

Date	Events and Deadlines
May 3	2023-24 unit goals, objectives, strategies, measures, and targets uploaded to Weave Education Interface.
May 10	Unit heads will be provided Weave accounts and editing access to their unit plans.
May 17	MORNING: Strategic Plan: 2030 Summit – Review of the strategic plan’s underlying principles and operational elements.
	AFTERNOON: Assessment Day. Qualitative data collection. Assessment and weave training session for non-academic unit heads.
	Unit heads may begin closing out the 2023-24 assessment cycle on Weave (if KPI data is available).
July 1	Deadline to submit 2024 annual reports for “internal review”
July 1 – August 9	Deadline for NAAC internal feedback (if applicable).
October 4	Deadline to close out unit level 2023-24 assessment cycle on Weave.
October 11	SUNY Morrisville Annual Report: Final. Written and published.
November 1	Deadline to have 2024-25 goals, objectives, KPIs, and targets completed on Weave.
December	Professional Development Day training.

Assessment Mapping Guide

Strategic Plan: 2030 Goal	Strategic Plan: 2030 Objective	Underlying themes	Aligning Core Values and Beliefs	Aligning Strategic Plan 2018-2023 (old) Goals
Goal 1: To embrace and cultivate a sustainability mindset.	Objective 1.1: Advance Environmental Sustainability	<ul style="list-style-type: none"> • Conservation initiatives • Green energy initiatives • Activities that foster environmental awareness. • Integration of green initiatives into academic and co-curricular development. 	Sustainability	Goal 7: To develop campus resources and operations with minimum resource footprint.
	Objective 1.2: Advance Social Sustainability	<ul style="list-style-type: none"> • Diversity Equity and Inclusion • Social mobility • Community “town and gown” relations • Student satisfaction • Student sense of belonging and integration to campus environment • Faculty and staff sense of belonging • Student success and wellbeing 	Sustainability Student-Centered Community Diversity	Goal 3: To enhance cultural competency and promote equity and inclusion. Goal 4: To create a vibrant campus community for personal interaction and growth. Goal 5: To engage the local community in civic and cultural affairs.

	Objective 1.3: Advance Economic Sustainability	<ul style="list-style-type: none"> • Initiatives that optimize enrollment revenue (recruitment and retention of students) • Initiatives that optimize spending • Initiatives that enhance fundraising • Initiatives that increase grant revenue 	<p>Sustainability</p> <p>Student Centered</p>	<p>Goal 8: To achieve effective and sustainable levels of required resources.</p> <p>Goal 6: To promote regional, statewide and international partnerships.</p>
Goal 2: To enhance and expand access to applied education.	Objective 2.1: Enhance and expand residential student experiential learning.	<ul style="list-style-type: none"> • Cross-divisional and co-curricular pathways • Bachelor degree program development • Credit bearing micro-credential development • Stackable credential pathways • Student volunteerism • Residential student community engagement. 	<p>Hands-On Learning</p> <p>Student-Centered</p> <p>Community</p> <p>Sustainability</p> <p>Diversity</p>	<p>Goal 1: To offer career-focused, experiential learning</p> <p>Goal 2: To promote inquiry and scholarship at all levels</p> <p>Goal 4: To create a vibrant campus community for personal interaction and growth</p> <p>Goal 8: To achieve effective and sustainable levels of required resources</p>
	Objective 2.2: Enhance and expand the non-traditional student college enterprise.	<ul style="list-style-type: none"> • Improvements to non-residential student living and learning infrastructure (services, technology, housing, etc.) • Stackable credential pathways • HyFlex, low residency academic program development • Graduate degree program development 	<p>Hands-On Learning</p> <p>Diversity</p>	<p>Goal 1: To offer career-focused, experiential learning</p> <p>Goal 2: To promote inquiry and scholarship at all levels</p> <p>Goal 8: To achieve effective and sustainable levels of required resources</p>

		<ul style="list-style-type: none"> • Workforce development • Credit articulation • Non-traditional institutional reputation and branding. 		
	<p>Objective 2.3: Enhance teaching and learning through innovation and scholarship</p>	<ul style="list-style-type: none"> • Outcomes that advance Academic policies and practices; • Academic research and innovation; • Institutional Technological advancements; and • Institutional effectiveness practices (assessment, institutional research, strategic planning) 	<p>Hands-On Learning</p> <p>Sustainability</p> <p>Student-Centered</p> <p>Community</p>	<p>Goal 2: To promote inquiry and scholarship at all levels</p> <p>Goal 6: To promote regional, statewide ad international partnerships</p> <p>Goal 9: To assess and document success in achieving the college’s mission</p>

Goal 3: To strengthen and enhance the institutional reputation.	Objective 3.1: Be a recognized college for student placement outcomes	<ul style="list-style-type: none"> • Reputation / identity • Outcomes that enhance Morrisville’s student internship placement; and • Student placements into careers (or advanced degree programs) • Recognitions (achievements) and rankings that advance Morrisville’s reputation for applied learning and placement. • Branding efforts that promote applied education 	Hands-On Learning	<p>Goal 1: To offer career-focused, experiential learning</p> <p>Goal 6: To promote regional, statewide and international partnerships</p> <p>Goal 9: To assess and document success in achieving the college’s mission</p>
	Objective 3.2: Be a recognized college for sustainability	<ul style="list-style-type: none"> • Reputation / identity • Recognitions (achievements) and rankings that advance Morrisville’s reputation in areas of sustainability; • Environmental conservation; • Social mobility; • Community engagement; and • Overall performance 	Sustainability Community Diversity	<p>Goal 6: To promote regional, statewide and international partnerships</p> <p>Goal 7: To develop campus resources and operations with minimum resource footprint</p> <p>Goal 9: To assess and document success in achieving the college’s mission</p>