



# Assessment Reports in Planning & Self-Study

**Intro for Department Chairs,  
Program Directors, and Assessment  
Coordinators**

*Office of Assessment & Strategic Initiatives,  
Marshall University*

*Spring 2026*



# What will this training cover?



- In this training, you'll learn how to collect and track assessment data and prepare and submit Assessment Reports in P&SS.
- Note that Assessment Reports are called "plans" in P&SS.



## Log in

1. **Log in through MyMU**
2. ***At the right side of the screen, under “Employee Quick Links,” click on “Watermark”***
3. ***Click on Planning & Self-Study (see screenshot on the right)***

Welcome to Watermark!

Choose your Watermark Product:

**Planning & Self-Study**

# Welcome to Your **Lead** Home Page!



As a lead of a program; you may see three areas in your system.

**My leadership:** Showcases each area (e.g. program) where you are placed as a lead, with links to any projects and charts showing their progress.

**Enter Program/Profile Progress:** Allows quick links to all items in the program.

**Service & committee involvement:** Calls your attention to tasks related to self-studies and program reviews.

**My Leadership**  
View and access the courses, programs, or organizational you lead. You will receive global reports and alerts for effective leadership. Navigate to their profiles to access more insights about its progress, success, and improvement.

**BusinessAdmin**  
Program - Jane Davis

**PROJECTS IN PROGRESS**

- Academic year 2023-2024**  
Organization included 0 outcomes being assessed  
Outcomes Progress and Results  
There are no outcomes for this plan.
- Business**  
Organization included 0 outcomes being assessed  
Outcomes Progress and Results  
There are no outcomes for this plan.
- Review 23-24**  
Organization included 0 pieces of evidence

**Sections by Narrative Status**  
Not Started | In Progress | Complete

**PROFILE PROGRESS**  
Mission: View Mission  
Outcomes: |  
Outcomes Mapped: Create Map  
Curriculum Map: Edit Map

**Service & Committee Involvement**  
Access your service tasks such as self-study and program review commitments.

Active

**SACSCOC**

3/75 narratives in progress  
1 piece of evidence added  
Last edited 06/24/2024 4:06 PM

Marshall University note:


If you haven't already set up your Organization in P&SS, please start with that step before working on assessment in Plans.



Marshall University note: “Plans” is P&SS’s terminology for what we call “annual Assessment Reports”!



## Plans



Annual plans are used to assess outcomes with measures and related data

## Welcome, Lester Lead!

Note from Your Administrator

Reminder: All non-instructional plans are due by December 15, 2025.

## My Leadership

View and access the course(s), program(s), or organization(s) you lead. You will receive guided prompts and tasks for effective leadership. Navigate to their profile(s) to access more insights about its progress, success, and improvement.



### BA in English

Program - Lester Lead

ENTER PROGRAM

#### PROJECTS IN PROGRESS

##### 2023-2033 Strategic Plan

5 Strategic Initiatives | 7 Strategic Goals

##### Outcomes Mapped to Strategic Goals

Not Mapped  Mapped



##### Academic Program Plan 2024-2025

1 organization included | 1 outcome being assessed

#### PROFILE PROGRESS

Mission: [View Mission](#)

Outcomes: 6

Outcomes Mapped: [Create Map](#)

Curriculum Map: [Edit Map](#)

# Selecting Outcome

Select Outcomes for Assessment 2 Outcomes Selected [APPLY SELECTION](#)

**Academic Affairs DEMO**  
Select outcomes for assessment for Academic Year 2022-2023.

**Academic Affairs DEMO Learning Outcomes (1)**  
Outcomes that articulate the knowledge, skills, and dispositions attained by students through learning and/or co-curricular experiences.

<input checked="" type="checkbox"/> <b>Critical Thinking</b> Analyze and interpret data to produce meaningful conclusions and recommendations in an organizational environment. [Bloom's taxonomy verb] [key learning statement] [contextual]	Last Assessed: Academic Year 2022-2023	<a href="#">⋮</a>
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[CREATE NEW OUTCOME](#)

When you are invited to participate in an **Assessment Plan**, you'll select via the checkbox next to the Outcomes that the Organization will assess during the Assessment Plan Reporting Year.

- Adding Outcomes begins with clicking the "Select Outcomes" button upon entering the Plan.
- The following page will display a list of all the Organization's Outcomes.

If changes to an Outcome are needed, they can be made on this page.

- Clicking the "3 dots" to the right of any Outcome will present the Edit options.
- Selecting "Create New Outcome" at the bottom of the screen will allow you to add additional Outcomes that are required.

*[Do note](#) any changes made to the Outcomes will reflect in Organization Management.*

Once you have finalized your selection of Outcomes, click **"Apply Selection"** in the upper right-hand corner of the page.



# Working in an Assessment Plan

When you are invited to participate in an **Assessment Plan**, you can:

- Select Outcomes
- Assess Outcomes Using Measures
- Add Data to Measures
- Identify Whether Measures are *Met or Not*
- Identify Whether Outcomes are *Met or Not*
- Add Actions
- Review/Share Annual Plan .pdf Report

The screenshot displays the 'Academic Affairs Learning Outcomes' dashboard. At the top, it identifies the outcome as 'Information Literacy and Research Skills' with a description: 'Students will acquire information literacy skills, including locating, evaluating, and ethically using information from diverse sources to support academic inquiry and scholarly pursuits.' Below this, four measure cards are shown: 'Student Survey' (MET), 'Skills Assessment Tests' (NOT MET), 'Peer Review and Collaboration' (NOT MET), and a 'New Measure' button. An 'Outcome Analysis' section provides a summary: 'The assessment revealed that 30% of students did not meet expected proficiency levels in critical areas of information literacy and research skills. This indicates a significant gap in students' abilities to navigate the research process effectively...' with a 'Read More' link. At the bottom, the 'Outcome Status' is set to 'Not Met', and there is a 'General Outcome Actions' section with an 'ADD NEW ACTION' button and the text 'Implement New Program or Services'.

# Adding Data to a Measure Within a Plan



1 Select your plan




2 Select a Measure & Click on Add Results




## Results

Evaluation of the measure activity


Select the results format that you would like to use for this measure.  
You will also be able to include a summary once results have been added.




Send emails to collect scores from faculty.



Upload results and write a summary.



Enter the total counts of met/not met.



Collect results from another system



**This includes integration with other Watermark products.**

**You may or may not see this option depending on files loaded during your product implementation. Talk with your Administrator if you have questions.**

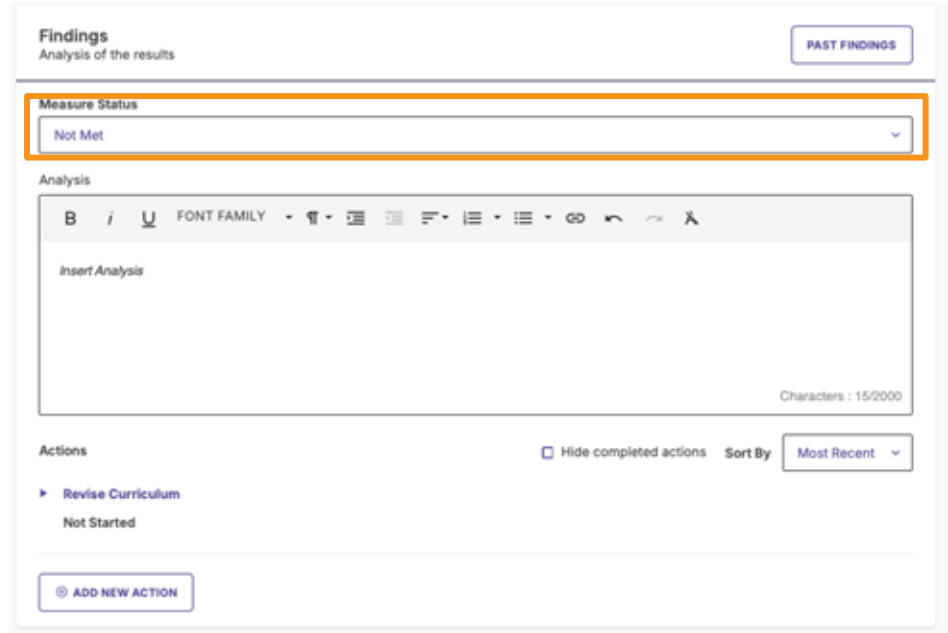


- At Marshall, we now have all 4 options for collecting data:
  - “Upload results and write a summary”
  - “Enter the total counts of met/not met.”
  - “Send emails to collect scores from faculty”
  - “Collect results from another system.” (This option will be relevant only for Social Work and COEPD right now.)

## Assessment Plans: Findings for Measures

Use the data you have added to your measures to identify whether you have **met the target for your measure** or **not**.

Choose “met” or “not met” to identify the status.

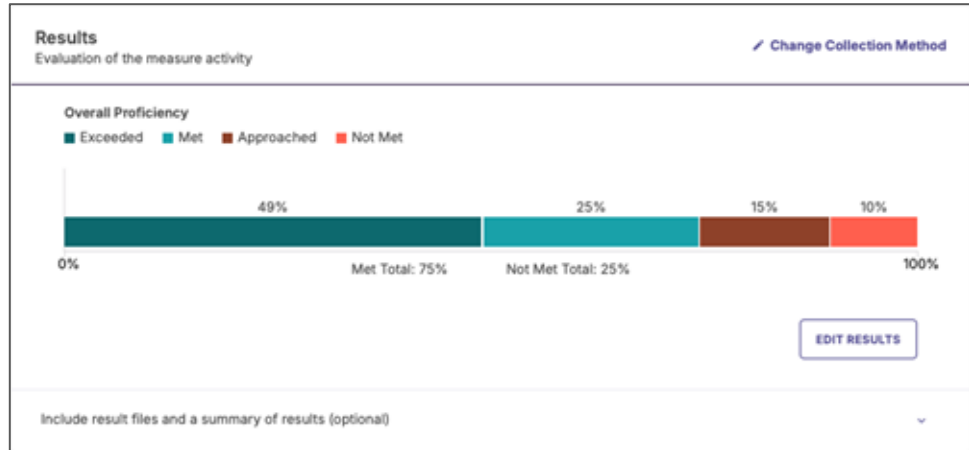
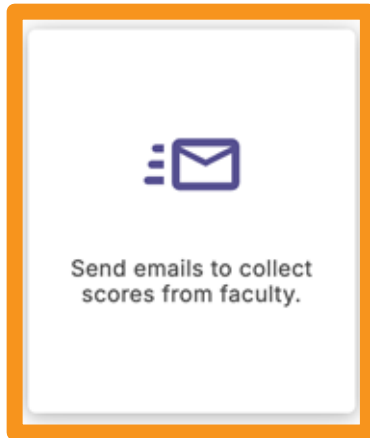


The screenshot displays the 'Findings' section of a software interface. At the top, the title 'Findings' is followed by the subtitle 'Analysis of the results' and a 'PAST FINDINGS' button. Below this is a 'Measure Status' dropdown menu, which is highlighted with an orange border and currently shows 'Not Met'. Underneath the dropdown is an 'Analysis' section containing a rich text editor with a toolbar (including bold, italic, underline, font family, and list options) and a text area with the placeholder 'Insert Analysis'. The character count 'Characters : 15/2000' is visible at the bottom right of the text area. Below the analysis section is an 'Actions' section with a 'Hide completed actions' checkbox and a 'Sort By' dropdown menu set to 'Most Recent'. A single action is listed: 'Revise Curriculum' with a status of 'Not Started'. At the bottom of the interface is an 'ADD NEW ACTION' button.

## Assessment Plans: Assess Outcomes/Measures By Sending Emails to Faculty

You can send emails to faculty from Planning & Self-Study. Faculty will receive an email alerting them to input student results. The results will generate a chart for the final report.

**Your System Administrator will have to ensure the proper files are loaded in the system for this method to function properly. This option may not be available in your system.**



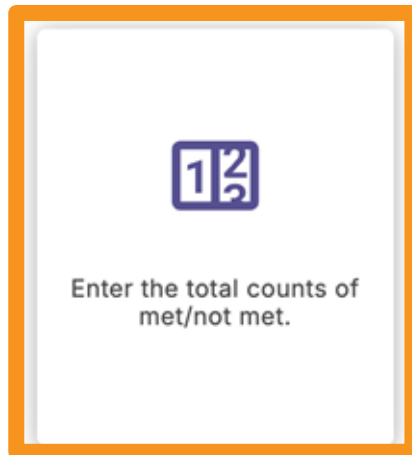
## Assessment Plans: Assess Outcomes/Measures By Uploading a File

You can **upload a file** and also include a **Summary**.



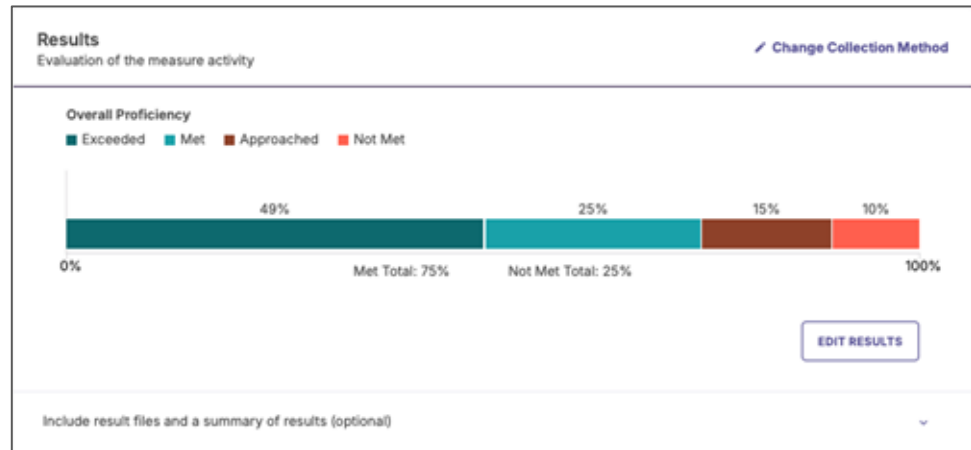
## Assessment Plans: Assess Outcomes/Measures By Entering Numbers in Count Categories

You can **enter numbers in count categories** that will then be converted to percentages of “met” or “not met” to compare to your target for the measure.



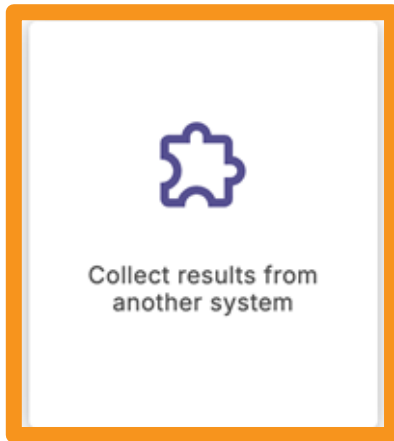
Enter the total counts of met/not met.

The input form is a white box with an orange border. Inside, there is a blue icon of a document with the numbers 1 and 2. Below the icon, the text reads "Enter the total counts of met/not met."



## Assessment Plans: Assess Outcomes/Measures From an Integration

If you have an another Watermark product that is integrated with Planning & Self-Study, data can be pulled in with this option.



Fields marked with \* are required.

Select where your results will be coming from. Next, you can select the specific type of results you need. You will be able to filter your results later.

Source\*

Select an Option

Outcomes Assessment Projects

Student Learning & Licensure



## **Assessment Plans: Assess Outcomes/Measures From Advanced Blackboard Integration**

*At Marshall, we have recently connected Blackboard to Planning & Self-Study, meaning that you will have the opportunity for flexibility in data collection from Blackboard to gain better insights into student learning and performance. This feature is dependent on the data imports.*

*Please reach out to Adam Russell (russell58@marshall.edu ) or Allison Carey (careya@marshall.edu ) to set up a demo of this Blackboard connection.*

The basic steps to pulling data from Blackboard into your Assessment Report are:

- In your Organization Management area, you will create a Measure to pull Blackboard data into.
- You will align the Measure to a Rubric or Activity in the Blackboard gradebook.
- You will define the Met Criteria for that Measure.

## Assessment Plans: Outcome Analysis

After you have analyzed at least one measure, you can determine whether your outcome is met or not.

Assessing your outcome overall will generate useful reports.

### Business Administration Learning Outcomes

#### Leadership and Teamwork

Students will collaborate effectively in diverse team settings, demonstrating leadership qualities, interpersonal skills, and the ability to motivate and influence others toward common goals.

##### 360-Degree Feedback

**MET**

Action: Additional Training

[View Results](#)

##### Leadership Simulation Exercises

**NOT MET**

Action: Revise Curriculum

[View Results](#)



New Measure

#### Outcome Analysis

Rich text editor toolbar with options for Bold (B), Italic (i), Underline (U), Font Family, and other text formatting tools. A green checkmark icon is visible in the bottom right corner of the editor area.

Characters: 0/2000

#### Outcome Status

Select Status

#### General Outcome Actions

ADD NEW ACTION

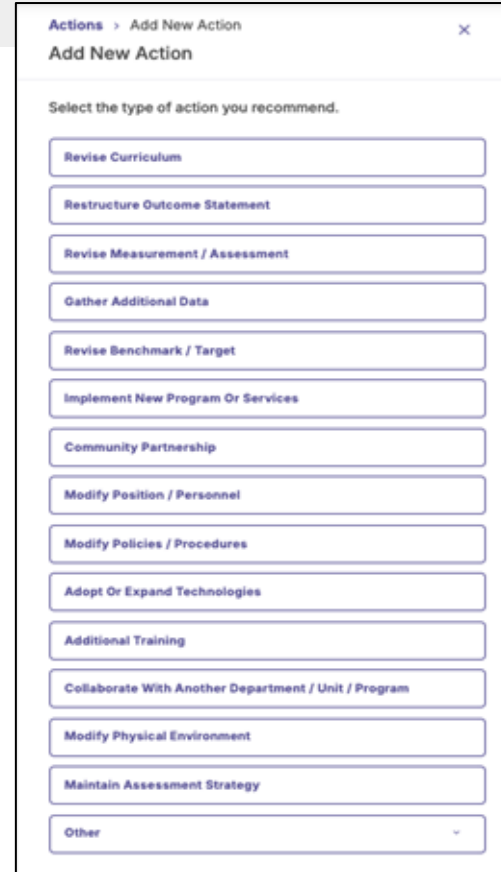
Adopt or Expand Technologies

## Assessment Plans: Entering Actions



Once you determine whether a measure (or outcome) is met or not met, you can assign an **appropriate action** at the measure or outcome level (or both).

For example, if a measure is not met, an action might be to "Revise Curriculum."



A screenshot of a dialog box titled "Add New Action" with a close button (X) in the top right corner. The dialog box contains the instruction "Select the type of action you recommend." followed by a vertical list of action types, each in a rounded rectangular button:

- Revise Curriculum
- Restructure Outcome Statement
- Revise Measurement / Assessment
- Gather Additional Data
- Revise Benchmark / Target
- Implement New Program Or Services
- Community Partnership
- Modify Position / Personnel
- Modify Policies / Procedures
- Adopt Or Expand Technologies
- Additional Training
- Collaborate With Another Department / Unit / Program
- Modify Physical Environment
- Maintain Assessment Strategy
- Other

# Assessment Plans: Plan PDF report

Outcomes, measures within those outcomes, actions and other data added within a Plan can be shared and downloaded on an annual Plan report in PDF format.

These reports are available for every program and organization (e.g. department) in your hierarchy individually that are included in an Assessment Plan.



ACADEMIC YEAR 2024-25  
**BusinessAdmin**

**Mission**  
Learning Solutions, leaders and innovation within our Business Administration program is committed to instilling excellence in education, research, and professional development. Innovation, integrity, collaboration, and adaptability principles are essential to our success. We are committed to the growth of our students, our faculty, and our community. Through interdisciplinary learning, experiential opportunities, and entrepreneurial development, we cultivate a culture of lifelong learners who drive sustainable growth, enhance diversity, and inspire positive change in the world of business leadership.

ACADEMIC YEAR 2024-25  
**Business Administration Learning Outcomes**

**Leadership and Teamwork**  
Students will collaborate effectively in diverse team settings, demonstrating leadership qualities, communication skills, and the ability to motivate and influence others toward common goals.

MEASURES	RESULTS	ACTIONS
<b>360-Degree Feedback</b> Student feedback from peers, supervisors, and subordinates on the individual's leadership skills. <b>Subject:</b> Public Speaking <b>Assessment:</b> Communication 360/360 <b>Target:</b> Use 360-degree feedback to determine that students meet essential leadership outcomes.	<b>MEET</b> <b>Action:</b> 100-80 response 75-80% <b>Analysis:</b> <ul style="list-style-type: none"><li><b>Communication and Organization</b><ul style="list-style-type: none"><li>Students use effectively the individual topics and abilities to achieve program goals.</li><li>Strong focus, relevant and comprehensive. Students collaborate with their partners. They engaged in good conversations.</li></ul></li></ul>	<b>Additional Training</b> <b>Not Met:</b> Discuss the areas to which the individual takes responsibility for their contributions to the team's success in future. Bring team. Analyze outcomes for their use in projects. Students must demonstrate being able to account for their actions.
<b>Leadership Simulation Exercises</b> Assess the ability to guide the team, resolve conflicts, and make decisions under pressure. <b>Subject:</b> Assignment <b>Assessment:</b> 360/360 <b>Target:</b> 75% of the students will produce a score of 4 or above.	<b>NOT MET</b> <b>Leadership Simulation Exercises</b> <ul style="list-style-type: none"><li>Excellent 100%</li><li>Good 100%</li><li>Needs Improvement 100%</li><li>Not Met 100%</li></ul> <b>Analysis:</b> <ul style="list-style-type: none"><li>Use communication practice projects where students must demonstrate leadership and teamwork to solve a business problem.</li><li>Use role-playing. Develop leadership by guiding the project and teamwork in collaboration, using a rubric that includes team cooperation.</li></ul> <b>Leadership Simulation Exercises</b> Students engage in realistic, interactive exercises designed to develop practical leadership abilities. These are practice roles that use business challenges where students must account leadership roles, team strategy, decision-making, and give their name through various situations. Each situation provides opportunities to demonstrate the leadership skills such as conflict resolution, decision-making, communication, and adaptability. Students are evaluated based on their performance, allowing for reflection and growth.	<b>Review Curriculum</b> <b>Not Met:</b> Performance in this dimension is evaluated through practical application, peer feedback, and self-assessments. Review criteria include decision-making effectiveness, team guidance, problem-solving, and overall leadership presence.

## Assessment Plans | Review Process | How to Submit?

Once you have selected your **Outcomes**, accessed the **Measures** and defined **Actions** for your Plan you will be able to **Submit** your Plan for review.

### Step 1

Click



### Step 2

**Review your Plan.**

If you need to make a change to your plan- Click "Edit". Once done making the edits. Click "Review and Submit" button again.

### Step 3

Click



### Few things to note

Once you have Submitted your Plan for review:

- The "EDIT" button will continue to show as an option TILL your reviewer starts to review your plan. If you click "EDIT" during this time you will need to re-submit your plan.
- Once your reviewer starts to review your plan; your whole plan will be locked down till your review process is complete.

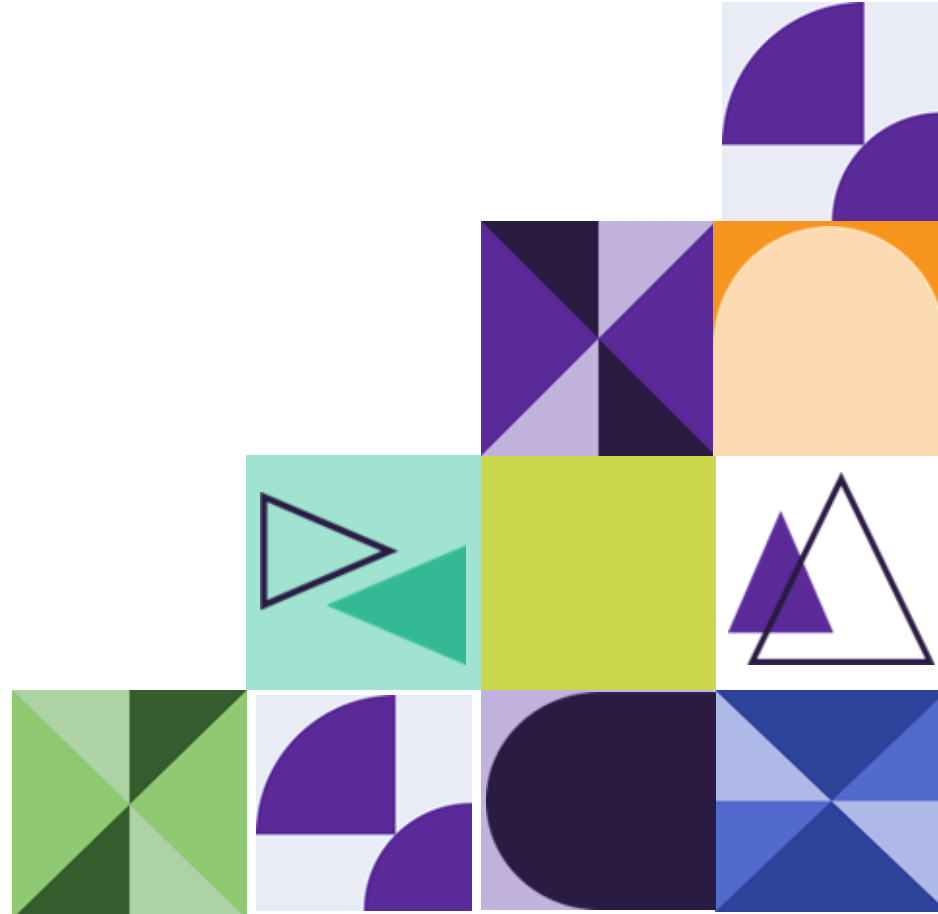
# Questions about Plans?

Email the Office of Assessment & Strategic Initiatives  
([russell58@marshall.edu](mailto:russell58@marshall.edu) or [careya@marshall.edu](mailto:careya@marshall.edu) )



# Thanks

FOR YOUR ATTENTION



**watermark**

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