



CLARK ATLANTA  
UNIVERSITY

# TracDat

## Electronic Planning & Assessment Reporting System (AES)

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# TracDat Overview

- TracDat is:
  - An innovative and comprehensive electronic system for the process of institutional planning and assessment
  - Used to manage and document data results for continuous improvement with Academic Programs and Administrative Education Support Services (AES)
  - Allows for the development of Action Plans and follow-ups to align with assessment results.
  - Promotes budgets to be aligned with objectives and outcomes link to continuous improvement.

<http://cauvmtracdat/tracdat/>

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# ACCESSING TRACDAT

- **TRACDAT CAN BE ACCESSED IN THREE WAYS:**
  - IN THE TRACDAT MANUAL CLICK THE FOLLOWING LINK:  
**[HTTP://CAUVMTRACDAT/TRACDAT](http://cauvmtracdat/tracdat)**
  - TYPE **HTTP://CAUVMTRACDAT/TRACDAT** INTO THE BROWSER
  - ACCESS THE **[CAU HOMEPAGE](#)**
    - SELECT DEPARTMENTS
    - CLICK ON OFFICE OF PLANNING, ASSESSMENT, AND RESEARCH
    - CLICK ON INSTITUTIONAL ASSESSMENT
    - CLICK ON TRACDAT
    - SELECT **HTTP://CAUVMTRACDAT/TRACDAT**

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# ASSESSMENT FOR AES UNITS

- An on-going process – Daily, Monthly, Annually...
- Units must systematically gather, analyze, and interpreting data to determine how well the unit's performance matches expectations
- Use the resulting information to understand and improve or enhance programs and services

# EXTERNAL PURPOSE

- **REGIONAL ACCREDITATION**
  - SACSOC CORE REQUIREMENT 2.5
  - SACSCOC COMPREHENSIVE STANDARD 3.3.1
- **FEDERAL FUNDING**
  - FEDERAL STUDENT FINANCIAL ASSISTANCE (SFA) PROGRAMS
  - TITLE IV (FEDERAL GRANTS, FAMILY EDUCATION LOAN PROGRAMS, WORK-STUDY PROGRAMS, AND DIRECT LOAN PROGRAMS)
- **PRIVATE FUNDING**
  - UNITED METHOD CHURCH

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# MORE THAN PAPERWORK...

## Complete Annual Cycle

### Phase I (Planning Phase)

- Unit's mission and vision statement
- Program Objectives
  - Related task and activities are also entered in this phase
- Mean of Assessment (Method, Tool, and Criteria of Success)
- Preliminary budget request for the academic year

### Phase II (Submission of Assessment Result)

- Gather results
- Describe the utilization of the results (impact)
- Develop a Action Plan
- Align budget to activities (Adjustment for the next academic year)

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# TracDat Annual Assessment Cycle



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# ARTICULATE/REFINE

## ARTICULATE/ REFINE

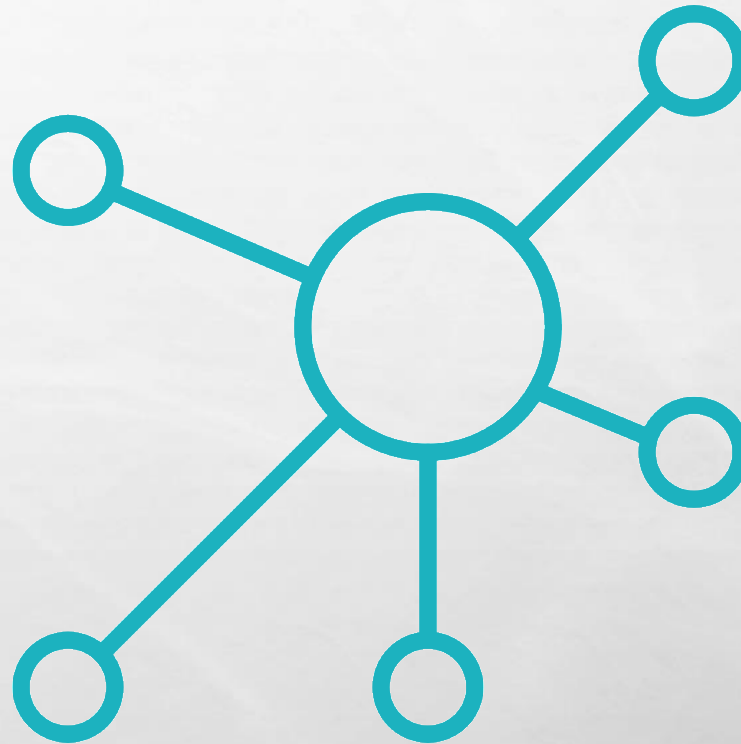
Align objectives with institutional and unit's goals and outcomes





# MAP OBJECTIVES

MAP objectives to unit activities where they are met and assessed



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# DESIGN

**DESIGN** assessment and instruments to gather evidence to the intended objective outcome.



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# COLLECT

**COLLECT** useful evidence regarding the achievement of expected results or levels of performance



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# CRITERIA FOR SUCCESS

**ANALYZE** assessment results to identify strengths, areas to improve or maintain. Use the criteria for success established for each expected result to determine levels of accomplishments.



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# UTILIZE

UTILIZE the resulting information to understand and improve services. Results can determine Action plans, and budget requests



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# **ENTERING DATA**

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# PHASE I – YOUR PLAN

- **STEP ONE:** SELECT THE PROGRAM/UNIT NAME FROM THE DROP DOWN MENU
- **STEP TWO:** CLICK THE **PROGRAM/AU TAB** AT THE TOP OF THE SCREEN
  - ENTER DEPARTMENTAL *MISSION AND VISION STATEMENTS* IN THE TEXT BOX > *CLICK ON THE QUESTION MARK TO THE RIGHT OF THE TEXT BOX IF ADDITIONAL INFORMATION IS NEEDED*
  - **CLICK SAVE CHANGES**
- **STEP THREE:** CLICK THE **PROGRAM/ADMIN ASSESSMENT PLAN TAB** AT THE TOP OF THE SCREEN
- **STEP FOUR:** SELECT THE **OUTCOMES/OBJECTIVES** SUB-TAB
  - EXISTING OUTCOME: EDIT | COPY| DELETE
  - ADD NEW OUTCOME
  - **CLICK THE ADD NEW OUTCOME/OBJECTIVE** BUTTON AT THE BOTTOM OF THE SCREEN

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# PHASE I – YOUR PLAN

- **FILTERING OLD OUTCOMES/OBJECTIVES**

- SELECT THE **FILTER ICON** IN THE TOP RIGHT CORNER OF THE SCREEN.
  - TO SHOW ONLY *ACTIVE OUTCOMES/OBJECTIVES*,
    - SELECT **ACTIVE** ON THE FILTER MENU OPTION.
    - THEN SELECT **APPLY FILTER**
  - ALL INACTIVE OUTCOMES/OBJECTIVES WILL BE HIDDEN.
- YOU CAN CLEAR YOUR FILTER OPTION AT ANY TIME TO SHOW HIDDEN OUTCOMES/OBJECTIVES. SIMPLY SELECT THE **FILTER ICON** AND THE **CLEAR FILTER**

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# PHASE I - YOUR PLAN

- **ADDITIONAL STEPS REQUIRED TO COMPLETE A NEW OUTCOME:**
  - **TYPE THE OUTCOME/OBJECTIVE NAME** > *CLICK QUESTION MARK TO THE RIGHT OF THE TEXT BOX IF ADDITIONAL INFORMATION IS NEEDED*
  - **TYPE DESCRIPTION** IN THE NEXT TEXT BOX TITLED **OUTCOME/OBJECTIVES**
  - **SELECT YOUR OUTCOME/OBJECTIVE TYPE**
    - *YOU CAN HOLD DOWN THE CONTROL KEY TO SELECT MULTIPLE OUTCOME TYPES.*
  - **CLICK OUTCOME/OBJECTIVE STATUS** (ACTIVE OR INACTIVE)

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# PHASE I - YOUR PLAN

- **ADDITIONAL STEPS REQUIRED TO COMPLETE A NEW OUTCOME:**
  - CLICK CALENDAR ICON SELECT A **START DATE** > *BEGINNING OF THE ASSESSMENT PERIOD*
  - CLICK CALENDAR ICON SELECT AN **END DATE** > *END OF THE ASSESSMENT PERIOD*
  - ENTER AMOUNT OF **FUNDS REQUESTED** FOR THIS OUTCOME/OBJECTIVE IF INCLUDED IN THE SUBMITTED **PRELIMINARY BUDGET** FOR THE YEAR (*ATTACH THE BUDGET*)
  - CLICK **SAVE CHANGES**

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# TracDat Annual Assessment Cycle (Phase I)

## MEANS OF ASSESSMENT:

- **Assessment Method**
  - A systematically designed process to gather information/data related to a specific learning Outcome/Objectives.
  - Multiple Means of Assessment (if applicable)
- **Assessment Tool**
  - Direct and Indirect
  - Quantitative or Qualitative
  - Formative or Summative

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# TracDat Annual Assessment Cycle (Phase I)

## MEANS OF ASSESSMENT - What type of assessment are you planning?

- **Usage of numbers** – Tracking participation in programs or services
  - **Method:** Using existing data, tracking systems, calendar systems
- **Student needs** – Keeps you aware of student body or specific populations.
  - **Method:** Surveys, focus groups, visual methods
- **Program effectiveness** – level of satisfaction, involvement, effectiveness, helpfulness.
  - **Methods:** Surveys, focus groups, observations
- **Cost Effectiveness** – How does a program/service being offered compared with cost?
  - Existing data, comparative data, Key Performance Indicators (KPI)

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# TracDat Annual Assessment Cycle (Phase I)

## MEANS OF ASSESSMENT - What type of assessment are you planning?

- **Campus Climate or Environment** – Assess the behaviors/attitudes on campus
  - Methods: Survey, rubric, existing data, KPI
- **Comparative (Benchmarking)** – Comparing a program/service against a comparison group
  - Methods: Survey, rubric, existing data, KPI
- **Using National Standards or Norms** - Comparing a program/services with a set pre-established, normative data.
  - Methods: Survey, document analysis, existing data.

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# PHASE I – YOUR PLAN

- **STEP FIVE: WHILE STILL IN THE PROGRAM/ADMIN ASSESSMENT PLAN > *CLICK MEANS OF ASSESSMENT SUB-TAB***
  - SELECT AN ASSESSMENT METHOD TOOL FROM THE DROP DOWN MENU
  - TYPE THE ASSESSMENT METHOD > *HOW WILL THE TOOL BE ADMINISTERED*

# TracDat Annual Assessment Cycle (Phase I)

## CRITERIA FOR SUCCESS

- Establishes a specific indicator for accomplishment of the outcome/objective and overall target for the program/department's performance.
- **Example:**
  - At least **75% of the students** living in the resident halls will report a **level of satisfaction** with the overall experience at a 3 (satisfactory) or above on a 5 point scale.

# PHASE I – YOUR PLAN

- **STEP FIVE:** WHILE STILL IN THE **PROGRAM/ADMIN ASSESSMENT PLAN** > ***CLICK MEANS OF ASSESSMENT SUB-TAB***
- **CLICK THE CRITERION BOX AND TYPE DESIRED QUANTITATIVE OR QUALITATIVE MEASUREMENT**
- **CLICK ASSESSMENT SCHEDULE** > ***WHEN WILL THE ASSESSMENT TOOL BE ADMINISTERED***
- **DOCUMENTS RELATED TO THE OUTCOME ASSESSMENT CAN ALSO BE ADDED (I.E. PRELIMINARY BUDGETS, RUBRICS, ETC.)**
  - **SELECT RELATED DOCUMENTS**
  - **THE OPTION TO SELECT A NEW DOCUMENT, DOCUMENT FROM REPOSITORY, OR PREVIOUSLY RELATED DOCUMENT IS GIVEN. SELECT THE APPROPRIATE OPTION, AND SELECT RELATE DOCUMENT.**

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# TracDat Annual Assessment Cycle (Phase I)

## ADDITIONAL ASSESSMENT INFORMATION

- **Activities** (*Task Name; Task Description*)
- **Related Goals** (*Institutional, Strategic Plan; Accrediting Bodies – Standards, etc.*)

# PHASE I – YOUR PLAN

- **STEP SIX:** WHILE STILL IN THE PROGRAM ASSESSMENT PLAN > ***CLICK RELATED COURSES***
  - SELECT ALL RELATED COURSES (*YOU WILL BE PROVIDED A LIST OF COURSES*)
  - INDICATE WHETHER THE OUTCOME IS **INTRODUCED; REINFORCED OR ASSESSED** IN THIS COURSE
  - **CLICK SAVE CHANGES**
  - AFTER ALL RELATED COURSES HAVE BEEN SELECTED, **CLICK RETURN TO THE OUTCOME**

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# PHASE I – YOUR PLAN

- **STEP SEVEN:** WHILE STILL IN THE PROGRAM/ADMIN ASSESSMENT PLAN > *CLICK ACTIVITIES*
  - FROM THE DROP DOWN MENU CHOOSE AN **OUTCOME/OBJECTIVE** TO ATTACH A MEASURE
  - CLICK THE **ADD NEW ACTIVITY** BUTTON AT THE BOTTOM OF THE SCREEN
  - TYPE THE **ACTIVITY NAME** AND A **DESCRIPTION** OF THE ACTIVITY
  - CLICK **SAVE CHANGES**

# PHASE I – YOUR PLAN

- **STEP EIGHT:** WHILE STILL IN THE PROGRAM/ADMIN ASSESSMENT PLAN > *CLICK RELATED GOALS* >
  - *CHECK APPROPRIATE STRATEGIC GOALS THE ACADEMIC PROGRAM SUPPORTS.*
    - *DEPARTMENTAL GOALS AND PROGRAM GOALS OR STANDARDS CAN ALSO BE ADDED IF AVAILABLE*
- **CLICK SAVE CHANGES**

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# PHASE I – YOUR PLAN

- **ADDING A DOCUMENT:**
  - **STEP ONE:** CLICK THE DOCUMENTS TAB AT THE TOP OF THE SCREEN
  - **STEP TWO:** CLICK THE **ADD NEW FOLDER BUTTON** AT THE BOTTOM OF THE SCREEN
    - TYPE NEW FOLDER NAME (I.E. ASSESSMENT) > *CLICK SAVE*

# PHASE I – YOUR PLAN

- **ADDING A DOCUMENT:**
  - **STEP THREE:** CLICK THE NEW FOLDER NAME (ASSESSMENT) TO THE LEFT OF THE SCREEN IN BLUE
  - **STEP FOUR:** CLICK THE **ADD NEW DOCUMENT BUTTON** ON THE BOTTOM OF THE SCREEN
    - CLICK BROWSE AND SELECT THE DOCUMENT > *CLICK OPEN*
    - TYPE NAME AND DESCRIPTION > *CLICK SAVE*

# PHASE I – YOUR PLAN

- **PRINTING YOUR PLAN**
  - CLICK THE **REPORTS TAB** AT THE TOP OF THE SCREEN
  - CLICK ***RUN*** TO THE RIGHT OF THE REPORT YOU WOULD LIKE TO RUN (**ASSESSMENT PLAN,**.)
  - CLICK THE **OPEN REPORT** BUTTON AT THE BOTTOM OF THE SCREEN
  - **PRINT** OR **SAVE** THE REPORT AS A PDF

# TracDat Annual Assessment Cycle (Phase II)

## **RESULTS of Assessment:**

- Include a summary of the assessment outcome:
  - Major findings
  - Achievements
  - Assessment data
- Submit evidence documents



# PHASE II – YOUR RESULTS

- **STEP ONE:** SELECT THE **PROGRAM/UNIT NAME** FROM THE DROP DOWN MENU IF ASSIGNED MORE THAN ONE PROGRAM; IF ONLY ONE PROGRAM IS ASSIGNED IT WILL BE THE ONLY OPTION TO CHOOSE
- **STEP TWO:** CLICK THE **RESULTS TAB** AT THE TOP OF THE SCREEN
  - EACH OUTCOME WITH AT LEAST ONE RESULT ENTERED WILL BE DISPLAYED
    - CLICK **SHOW RESULTS** - LISTED CHRONOLOGICAL IN DESCENDING ORDER
    - SELECT THE NUMBER UNDER THE ACTIONS COLUMN TO SEE ACTION TAKEN BASED UPON THE RESULT - THE NUMBER REFLECT THE NUMBER OF ACTIONS TAKEN
    - ATTACH RAW ASSESSMENT DATA – RELATED DOCUMENTS – NUMBER INDICATE HOW MANY DOCUMENTS ARE ATTACHED.

# PHASE II – YOUR RESULTS

- TYPE IN THE **RESULTS** BOX A SUMMARY OF THE ASSESSMENT RESULTS
- CLICK THE CALENDAR ICON NEXT TO **RESULTS DATE** > *SELECT THE DAY THE RESULTS WERE ACTUALLY COLLECTED (CURRENT DATE ENTERED BY DEFAULT)*
- CLICK DROP DOWN MENU **RESULT TYPE** > *SELECT CRITERION MET OR CRITERION NOT MET*
- CLICK DROP DOWN MENU **ACTION STATUS**, SELECT ACTION PLAN COMPLETE, OR ACTION PLAN INCOMPLETE > FOR ANY SUGGESTED ACTION
  - CLICK CALENDAR ICON NEXT TO **ACTION STATUS** UPDATE IF ACTION PLAN WAS MARKED INCOMPLETE
- DOCUMENTS CAN ALSO BE ATTACHED TO THE RESULTS

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# PHASE II – YOUR RESULTS

- **STEP TWO:** CLICK THE *RESULTS* TAB AT THE TOP OF THE SCREEN
  - TYPE IN **USE OF RESULTS** > *USE OF RESULTS SHOULD CONTAIN INFORMATION ON HOW YOU PLAN TO USE YOUR RESULTS FOR THE NEXT ACADEMIC YEAR*
  - CLICK THE **SAVE CHANGES**

# PHASE II – YOUR RESULTS

- **STEP THREE:** WHILE STILL IN RESULTS > *CLICK ADD PLAN OF ACTION FOR IMPROVEMENT AT THE BOTTOM OF THE SCREEN*
  - TYPE THE **PLAN OF ACTION FOR IMPROVEMENT**
  - CLICK CALENDAR ICON AND **SELECT A DATE**
  - SELECT YES IF THE PLAN OF ACTION IMPACTS THE **BUDGET**
  - **ENTER REQUESTED AMOUNT** > *PLEASE ADD WHOLE NUMBERS ONLY, NO CHARACTERS OR DECIMALS*
  - TYPE **PLANNING BASED BUDGETING DESCRIPTION**
  - CLICK **SAVE CHANGES**

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# PHASE II – YOUR RESULTS

- **STEP FOUR: PRINTING YOUR REPORT**

- CLICK THE **REPORTS TAB** AT THE TOP OF THE SCREEN
- CLICK ***RUN*** TO THE RIGHT OF THE REPORT YOU WOULD LIKE TO RUN (E.G. **ASSESSMENT PLAN, UNIT/PROGRAM ASSESSMENT REPORT FOUR COLUMN, CURRICULUM MAP, ETC.**)
- CLICK THE **OPEN REPORT** BUTTON AT THE BOTTOM OF THE SCREEN
- **PRINT OR SAVE THE REPORT AS A PDF**

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# RESOURCES

- [HTTP://WWW.CAU.EDU/OPAR/INSTITUTIONAL-ASSESSMENT/TRAINING-WORKSHOPS.HTML](http://www.cau.edu/OPAR/INSTITUTIONAL-ASSESSMENT/TRAINING-WORKSHOPS.HTML) (TRAINING WORKSHOP)
- [HTTP://WWW.CAU.EDU/OPAR/INSTITUTIONAL-ASSESSMENT/TRACDAT.HTML](http://www.cau.edu/OPAR/INSTITUTIONAL-ASSESSMENT/TRACDAT.HTML) (TRACDAT ADMINISTRATOR'S GUIDE)

**QUESTIONS?**

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