Reviewing Tk20 Assessment Entries in Excel

Entry and Review Protocol

Entry Requirements

Following an annual cycle, all Tk20 Contacts (Audit Summary sheet) are required to enter into Tk20:

☐ Quarterly status updates (Period A: Q1=Oct 1-15, Q2=Jan 1-15, Q3=Apr 1-15)
☐ Final status update: Results/Insights and Action Plan (Q4=Oct 1-Jul 15)
☐ Planned goals, outcomes, KPIs for the upcoming academic year (Jul 16-Aug 16)

Review Process (See ulc.ultimate\Assessment-Cycle\Quarterly-Tk20-Audit\Guides for flowchart)

☐ 3 Excel workbooks divided by UL cluster made available in ulc.ultimate (Oct 1)
☐ ULA audits quarterly updates in Excel (Period B: Q1=Oct 16-19, Q2=Jan 16-19, Q3=Apr 16-19, Q4=Jul 16-19)
☐ Unit, Dept, or Strategic Initiative Heads conduct outcome-level review (Period C: Q1=Oct 20-30, Q2: Jan 20-30, Q3: Apr 20-30, Q4: Jul 20-30) and follow up with Tk20 Contact on any missing components
☐ Cluster Leaders conduct unit/initiative-level review (Period D: Q1=Nov 1-12, Q2=Feb 1-12, Q3=May 1-12, Q4=Aug 1-12)


ulc.ultimate/Assessment-Cycle/Quarterly-Tk20-Audit/2017-2018
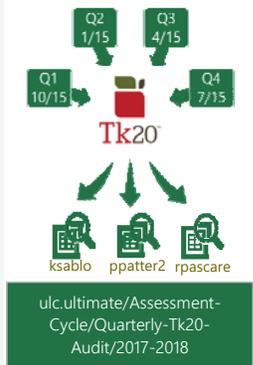
Audit Summary Sheet   `OPEN`

The Audit Summary sheet contains the most recent audit information for each cluster.

1 **Symbol Keys -** Hover over a comment marker to view the column's auditing symbol key.

2 **Goals/KPIs Entered** - These two columns keep a running count of Goals and KPIs entered into Tk20 by the unit.

✔ **3-5 Goals/KPIs entered** (Ideal #in terms of substance and manageability; From 2018-2019: 3-5 Goals)
❗ **1-2 Goals/KPIs entered** (Does not capture level of inquiry/evidence necessary)
✖ **0 Goals/KPIs entered** (Does not show evidence of assessment planning)
▼ **>5 Goals/KPIs entered** (Difficult to complete/report on every item in effective/timely manner)
(May create a backlog for auditors and reviewers)

3 **Goals with Outcomes** - Every unit Goal should be linked to at least one SMART Outcome. This column tracks the number of Goals with 1-2 Outcomes entered in Tk20.

✅ <u>All</u> Goals entered each have 1-2 Outcomes
⚠️ <u>Some</u> Goals entered each have 1-2 Outcomes
❎ <u>No</u> Outcomes

4 **Q1-Q2-Q3 Audits**- The two columns under *Quarters 1, 2* and *3* tally the number of respective Goal updates and KPI updates. The auditing symbols correspond to the difference between the Entered Goals/KPIs count and the Goal/KPI Updates count:

● Updates for <u>all</u> Goals/KPIs entered
▲ Updates for <u>some</u> Goals/KPIs entered
◆ Updates for <u>no</u> Goals/KPIs entered

5 **Final Audit** - The two columns under indicate whether the unit/initiative has completed all Results/Insights and Action Plan sections in Tk20.
⚑ Sections complete
⚑ Sections partially complete
⚑ No sections complete
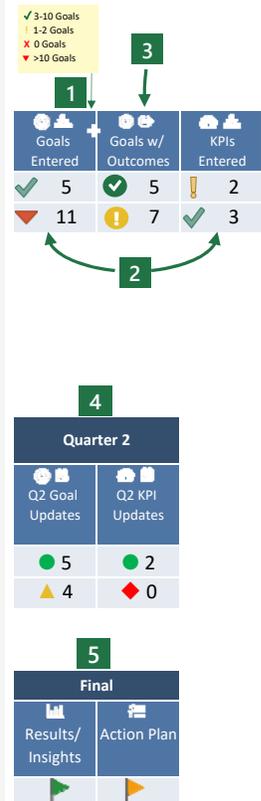
Unit Sheet

This sheet contains the selected unit's most recent Tk20 entries that have been audited by UL Assessment. In addition to the numeric/symbol audit and comment methods explained above, reviewers should pay close attention to color marked audits on each unit sheet:

🟩 If the Outcome Lead believes that work to achieve the stated Outcome(s) is on track, then the Current Status is displayed in green.

🟨 If the Outcome Lead believes that work to achieve the stated Outcome(s) is slightly behind schedule, then the Current Status is displayed in yellow.

🟥 Any cell that is filled in with red signals missing required information.

🟪 Any cell that is filled in with magenta highlights entries that are only partially completed, are unclear. or contain erroneous information.