

Reviewing Tk20 Assessment Entries in Excel

Entry and Review Protocol

Entry Requirements

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

- Quarterly status updates (Period A: Q1=Oct 1-15, Q2=Jan 1-15, Q3=Apr 1-15)
- 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 entries 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.
 - ✓ **3-10 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)
 - ▼ **>10 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.
 - ✓ **All Goals entered each have 1-2 Outcomes**
 - ! **Some Goals entered each have 1-2 Outcomes**
 - ✗ **No Outcomes**
- 4 Q1-Q2-Q3 Audits** - The two columns under Quarters 1-3 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:
 - Update for all Goals/KPIs entered
 - ▲ Update for some Goals/KPIs entered
 - ◆ Update for no Goals/KPIs entered
- 5 Q4 Audits** - The two columns under Quarter 4 indicate whether the unit/initiative has completed the Results and Insights section and Action Plan section in Tk20.
 - ▶ Section complete
 - ▶ Section partially complete
 - ▶ Section incomplete

Legend: ✓ 3-10 Goals, ! 1-2 Goals, ✗ 0 Goals, ▼ >10 Goals

Goals Entered	Goals w/ Outcomes	KPIs Entered
6	4	2
11	7	3

Quarter 2

Q2 Goal Updates	Q2 KPI Updates
9	19
4	0

Quarter 4

Results/ Insights	Action Plan
▶	▶

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.