

Annual Assessment, Planning, & Budget Report Guidelines  
for Academic and Nonacademic Units

Loyola University New Orleans  
(A&S version – Report Due June 20, 2005)

Over the last several years each academic and nonacademic unit at Loyola has produced an annual report providing information reflecting on that unit's accomplishments. Beginning this year, the content and format are being changed to better reflect the integrated systems of assessment, planning, budgeting, and evaluation that our accrediting agency, SACS, requires. The changes in the reports allow us to document, to the extent necessary to ensure an affirmative review by SACS, that departmental and division systems are operating in an integrated fashion. Besides satisfying our accrediting organization's expectations, revisions to the annual report process will increase our understanding of how these integrated systems lead to continuous improvement in support of Loyola's Mission:

Loyola University New Orleans, a Jesuit and Catholic institution of higher education, welcomes students of diverse backgrounds and prepares them to lead meaningful lives with and for others; to pursue truth, wisdom, and virtue; and to work for a more just world. Inspired by Ignatius of Loyola's vision of finding God in all things, the university is grounded in the liberal arts and sciences, while also offering opportunities for professional studies in undergraduate and selected graduate programs. Through teaching, research, creative activities, and service, the faculty, in cooperation with the staff, strives to educate the whole student and to benefit the larger community.

The following guidelines are for ALL reports from individual operating units through divisions, and, finally, the President's Report to the Jesuit Corporation and the Board of Trustees. ALL reports will be posted on the Intranet website section for each particular unit. Particular sections of the guidelines may not be appropriate for some units (e.g., number of faculty

A&S instructions: Each department's report should be submitted to the Dean for approval. The report then may be posted on the department's Intranet website in pdf format. The dean will summarize the departmental reports as part of the college report that in turn is submitted to the Provost.

The outline for the annual report is attached. Suggested maximum number of pages is noted for each section. In some cases, circumstances may require reports to exceed these limits. For consistency of appearance all reports should use Times or Times New Roman font, 12 point, with 1" margins on top, bottom and right and 1.25" on the left (for ease of binding in necessary). Pages should be numbered in the upper right hand corner.

**Annual Report Outline (A&S version May 2005)**  
(11 pages max)

**1. Executive Summary** (1 page max)

- 1.1 Name of the department
- 1.2 Description of department and its mission
- 1.3 Assessment of the department
- 1.4 Goals of the department
- 1.5 Review of the past and current budgets
- 1.6 Resource needs/wants/reallocation
- 1.7 Summary of achievements

**2. Identification of the Department** (Official name) (1 page max)

- 2.1 Mission or purpose statement
- 2.2 General statement and descriptive information concerning the department
  - 2.2.1 Headcounts of full-time and part-time staff (Stats Day 04F & 05S) \*
  - 2.2.2 Headcounts of faculty (Stats Day 04F & 05S): tenured, tenure track, full-time extraordinary, and part-time extraordinary. \*
  - 2.2.3 Headcounts and student credit hours of fulltime and part-time undergraduate students (if appropriate) (Stats Day 04F & 05S) \*
  - 2.2.4 Headcounts and student credit hours of fulltime and part-time graduate students (if appropriate) (Stats Day 04F & 05S) \*

\* Headcounts of faculty and staff should be taken by department chair/head. Count of students as of Stats Day are available from the website of the Office of Institutional Research (url to be provided).

**3. Assessment** (2 pages max)

- 3.1 General statement on how assessment is conducted within the department both assessment of learning outcomes and departmental processes. (The department's assessment plan should be posted to its Intranet site)
- 3.2 Year 04-05 goals/objectives for learning outcomes and departmental processes (include how these goals are strategic to both the department's, college's, and the university's mission; these should be based on the department's strategic plan).
- 3.3 Description of assessment activities and their results for year 04-05 goals including learning outcomes assessment and processes assessment.
- 3.4 Assessment of internal (within the university) and external (outside Loyola) environments affecting the department

**4. Planning** (2 pages max)

- 4.1 General statement describing strategic planning in the department (The complete strategic plan should be posted on the department's Intranet site.)
- 4.2 Top 3-4 strategic learning outcome and process goals/objectives for 05-06 year (Indicate how the assessment information from Section 3 above informed the formation of these goals.)
- 4.3 Description of resources needed to support the obtainment of the 05-06 goals
- 4.4 Evaluation criteria and evaluation plan for these goals

**5. Budget** (2 pages max)

5.1 FY04-05 “budgeted” totals for both salary and operating budgets.

5.1.1 Budget discussion (This discussion is a comment on whether or not the budget for the current fiscal year (August 1, 2004 – July 31, 2005) seems adequate.)

5.2 NOT APPLICABLE for A&S Departments: FY05-06 “budgeted” totals for both salary and operating budgets \*

5.2.1 NOT APPLICABLE for A&S Departments: Budget discussion (This discussion is a comment on whether or not the budget for the fiscal year (August 1, 2005 – July 31, 2006) seems adequate and what precautions the unit needs to exercise in its operations.)

\* Salary and operating budget information is available through the FRS system.

**6. Resource Needs/Wants/Reallocation [for FY06-07 – FY10-11]** (2 pages max)

6.1 Personnel

6.1.1 General statement on adequacy of staffing to meet present and future strategic goals

6.1.2 Priority listing of additional/revised faculty/staff positions

6.2 Facility improvements

6.2.1 General statement on facilities including classrooms, office space, meeting spaces, etc. to meet present and future strategic goals

6.2.2 Priority listing of facility improvements (Include cost estimates to the extent possible.)

6.3 Technology/professional development support

6.3.1 General statement on technology/professional development needed to meet present and future strategic goals

6.3.2 Priority listing of technology needs, including media, professional development

6.4 Budget reduction/reallocation/revenue generation plans

6.4.1 General statement regarding areas for reallocation, reduction of expenses, or generation of additional revenue

6.4.2 Priority listing of budget reduction/reallocation/revenue generation plans

**7. Summary of Achievements** (1 page max)

7.1 Department as a whole

7.2 Faculty achievements/service summarized (if appropriate)

7.3 Staff achievements/service summarized (if appropriate)

7.4 Student achievements summarized (if appropriate)

**8. Appendices** (if appropriate)

Include here the list of all publications, presentations, and/or grants for all departmental faculty for the calendar year 2004.