
PRAC 2013-2014 Annual Report

Kelley School of
Business IUPUI

Kelley Indianapolis Assessment
Committee, Todd Roberson, Chair

Executive Summary

The Kelley Indianapolis Assessment Committee (KIAC) is pleased to present the following report to the IUPUI Program Review and Assessment Committee (PRAC). The report highlights key assessment activity and initiatives undertaken during the 2013-14 academic year by the committee on behalf of the Kelley School of Business at IUPUI.

The Kelley School of Business, as a Core School of Indiana University, has combined the AACSB accreditation for the Kelley School's academic programs on both the Bloomington and Indianapolis (IUPUI) campuses. The Bloomington and Indianapolis assessment initiatives are united into a joint and coordinated effort. Kelley's assessment specialist is charged with encouraging standardization and uniformity in the reporting structure across the campuses and programs and assists with the analyses, interpretation, reporting, and use of assessment data to improve student learning within the courses and across the curricula. He travels to Indianapolis weekly to consult with and instruct faculty about best practices for learning outcomes assessment and to report on progress.

Four programs housed at Kelley Indianapolis (Undergraduate Program, Evening MBA Program, Masters in Accounting Program and Masters in Taxation Program) coordinate with their program counterparts on the Bloomington campus. Since each program has unique target markets and unique curriculum needs, program goals for Indianapolis based programs may differ from the program goals for their counterparts in Bloomington; however, processes following from the program goals are kept consistent.

In addition, a new graduate academic program housed only at Kelley IUPUI, The Business of Medicine (BOM) Program, has been formed and is now accepting students. According to the accrediting body of Kelley, Association to Advance Collegiate Schools of Business (AACSB), during the initial year of operation the BOM program is excluded from assessment activity. During the academic year, meetings were held to initiate the process of assessment within the BOM Program, including establishing program goals.

The Kelley School of Business was reaccredited by the AACSB in 2012 with plans and enhancements underway for the next reaccreditation in 2017.

The assessment process is managed and executed in Indianapolis by the Kelley Indianapolis Assessment Committee (KIAC). The KIAC consists of nine full-time faculty members, the Associate Dean for Research and Programs and an Assessment Specialist. During the academic year reported upon here, the full committee met nine times (roughly once per month). The institutional records, agendas and outcomes of the KIAC are managed in a specially established IU Box Account, where all members of the committee may review, comment and contribute to the assessment process on behalf of the Kelley School of Business.

The following report highlights KIAC activity, initiatives and results for the 2013-14 academic year.

Todd Roberson
Senior Lecturer of Finance
Chair, Kelley Indianapolis Assessment Committee
IU Kelley School of Business at IUPUI

Critical Events Calendar

The first action of the KIAC was to establish a Critical Events Calendar to guide the group's efforts during the year. The following calendar was proposed by the chair at the initial KIAC meeting and was adopted by the group unanimously.

Action Item	Timeline
Determination of Undergraduate Courses for Assessment in 2013-14	No Later than August 15, 2013
Determination of MBA Courses for Assessment in 2013-14	No Later than August 15, 2013
Determination of MBA Courses for Assessment in 2013-14	No Later than August 15, 2013
First Full Committee KIAC Meeting 2013-2014	September 4, 2013
Adoption of Official KIAC Charge	September 15, 2013
Assessment Counseling for Course Instructors	Beginning September 15, 2013
AACSB Accreditation Conference	Attendance by Chair Sept 22-24, 2013
Assessment Reports for Fall 2013	By Feb 1, 2014
Reorganization of PBLs into UBGLs	By January 31, 2014
Assessment Reports for Spring 2014	By July 1, 2014
"Best Practices in Assessment" Guide	By July 31, 2014
Annual Action Report to Program Committees	By July 31, 2014

While some limited revisions were made to the calendar, and some additions made as events warranted, the work of the KIAC was more or less guided by the Critical Events Calendar during the academic year.

Official Charge

As noted in the 2012-13 Kelley PRAC Report, the organization and membership of the KIAC was significantly revised for the 2013-14 year. This was due to concerns and goals noted in the 2012-13 report. As such, it was necessary to craft and adopt an official committee charge. After much discussion and input from new KIAC members, the following charge was officially adopted by the KIAC members (*please see next page*):

It's noteworthy that this process proved valuable not only for the KIAC but for the Kelley School as a whole. In an internal review of Kelley committees, it was learned that a significant number operated without an official charge. The work of the KIAC in establishing a charge provided a template for an internal initiative to establish charges for Kelley committees, and to consider termination or consolidation of those committees without clearly defined goals.

This is an example of how "assessment" can go beyond individual courses to entire programs or even academic units to enable continuous improvement.

Full Committee

The fundamental and over-arching charge of the KSBI Assessment committee is to promote and encourage a culture of continuous improvement through Assessment and Assurance of Learning activities required for maintenance of AACSB Accreditation by Kelley Indianapolis.

To do so, the committee shall -

- Serve as a research and review body for alignment of student learning outcomes with the stated goals of each academic program to report, analyze and promote Assurance of Learning
- Determine the number and distribution of sample courses targeted for formal, structured and reported Assessment by academic programs to continuously improve teaching and learning and to attain AACSB and IUPUI assessment standards
- Maintain communication with program Policy Committees with regard to conduct of, progress on, and delivery of Assessment data and reports
- Continually update, streamline and coordinate formulation of Program Goals in compliance with IUPUI Principles of Learning
- Facilitate connection between instructors conducting Assessments and Kelley Assessment Specialist or other Assessment resources
- Provide independent analysis and structured feedback on Assessments and Surveys to foster a culture of reflective assessment and to successfully maintain AACSB Accreditation
- Represent Kelley Indianapolis on the IUPUI PRAC Committee
- Attend regularly scheduled meetings of the KSBI Assessment Committee

Assessment Clustering, Counseling & Training

The AACSB requires that Assurance of Learning (AoL) be documented by *sampling*; that is, not all courses need to be assessed against the program goals; only representative sample need be reviewed. This is in contrast to the IUPUI practice of assessing all courses against the Principles of Undergraduate Learning (PULs) on a pre-determined schedule. With this in mind, the Associate Dean, the Assessment Specialist and the KIAC Chair created an Assessment Cluster for each semester of the 2013-14 year to cover assessment needs in each of the included programs noted on page 1 of this report. The clusters can be summarized as follows:

Program	Fall 2013	Spring 2014
Undergraduate	12 courses	15 courses
Evening MBA	1 course	2 courses
Master of Science in Taxation	4 courses	1 course
Master of Science in Accounting	3 courses	1 course

Once the Assessment Cluster was established for each semester, the following AoL process was initiated:

- The instructor of the course was contacted by the KIAC Chair and notified that an assessment was to be done for the course; the instructor was required to contact the Assessment Specialist to schedule a consultation
- The Associate Dean followed up on the request by the KIAC Chair to remind the faculty to schedule a consultation
- The Assessment Specialist met individually to assist the faculty member in designing an effective direct measure for assessment; in addition, the Assessment specialist provided a due date for the AoL report (please see page 2 for the Critical Events Calendar)
- The faculty member submitted the AoL report to the KIAC for analysis, advisory comments and action

In addition to individual instructor consultation and training by the Assessment Specialist, generalized training on the goals and outcomes of assessment were provided to KIAC members (many of whom were new to the assessment process) as a regular component of KIAC monthly meetings. Training was provided by the Chair, the Assessment Specialist and by outside experts brought to meetings for consultation. Training topics included:

- Differentiating between direct and indirect measures of assessment
- The meaning and relationship of Goals, Outcomes and Traits
- Using a Primary Trait Analysis to Construct a Rubric
- Analysis of PUL Reports and AoL Reports
- Assessing Critical Thinking
- Assessing Quantitative Skills
- Crafting Learning Goals

It is expected that this training will yield a much better efficiency in the KIAC efforts in the coming year. One action item under discussion is extending more generalized training to the faculty at large.

Assessment & Assurance of Learning Reports

As a result of the above process, the KIAC received faculty-generated AoL reports during the 2013-14 academic year. Of the reports submitted, special attention and action items were generated from the following reports:

Semester	Course	PUL(s) Assessed
Fall 2013	A312	4 & 1B
	A328	2 & 1A
	A302	1C
	X103	1A
	X100	1A
Spring 2014	A325	1B & 3
	P421	1B & 3
	F303	3
	M426	1A & 3
	A555	NA-Graduate Course
	A522	NA-Graduate Course
	A515	NA Graduate Course

The AoL Reports submitted by faculty and the Institutional Management & Institutional Research (IMIR) collected PUL assessments done on Oncourse are collected and housed in the IU Box Account for analysis, recommendation and response by the KIAC.

The next part of this report highlights key actions taken by the KIAC in response to the data collected.

PART TWO: CLOSING THE LOOP; RESPONSES TO DATA & INSTITUTIONAL RESULTS

New Undergraduate Program Goals Aligned with PULs

One very serious difficulty dealt with in the assessment efforts of the Kelley School of Business at IUPUI was a disconnect between the stated goals of the Kelley Indianapolis Undergraduate Program — the Principles of Business Learning (PBLs) and the IUPUI Undergraduate programs — the Principles of Undergraduate Learning (PULs). While there is some history to this which will be omitted here, the effect of this was to essentially create a two-tiered assessment task for our faculty: one assessment was needed to keep us compliant with the AACSB and another was needed to ensure compliance with IUPUI.

One predictable effect of this disconnect was to create resistance to assessment among the full-time faculty due to the doubling of the assessment workload; another was to cause serious confusion about the goals of the Undergraduate Program among the associate and adjunct faculty who play an important role in teaching undergraduate courses.

The KIAC responded to this long-held concern by working with the Kelley Undergraduate Policy Committee to draft, revise and implement a new set of goals for the Kelley Undergraduate Program — the Undergraduate Business Learning Goals (UBLGs).

This critical process, which took a semester from inception to adoption, took the following form:

- The PBLs were “mapped” onto the PULs to the extent possible by the KIAC chair and Assessment Specialist
- There were critical “holes” in mapping; notable was a PBL corresponding to PUL 1B; in such cases, new language was drafted by the KIAC chair
- The mapping was explained, vetted and revised by the Undergraduate Policy Committee
- Language was drafted by the KIAC chair and Undergraduate Policy Committee to provide outcomes and traits that corresponded to the PULs to provide faculty with the UBLGs
- Revisions were made by expert faculty teaching courses where the corresponding PUL was a major emphasis
- A final document was distributed to all faculty for inclusion in their syllabi

In plain language: the PULs were given a “business spin” and packaged as the UBLGs. The result is that faculty can now simultaneously conduct assessments for the AACSB and IUPUI with a harmonized set of goals.

Please see the next page for the PUL/UBLG array that is used by faculty for assessment.

No.	PUL	UBLG
1a	<p>LANGUAGE SKILLS</p> <p>a) Reading & Understanding books, articles & instruction manuals, b) Delivering a prepared presentation to a group c) Contributing to a team to solve problems</p>	<p>BUSINESS LANGUAGE</p> <p>Students will prepare and deliver written and oral messages that effectively express ideas and facts to others. Students will prepare and deliver effective oral and written persuasive arguments.</p>
1b	<p>QUANTITATIVE SKILLS</p> <p>a) Solving mathematical problems b) Using mathematics in everyday life c) Understanding statistical report d) Preparing a report using quantitative data</p>	<p>BUSINESS QUANTITATIVE SKILLS</p> <p>Students will perform quantitative analysis and use the results to make business decisions.</p>
1c	<p>INFORMATION RESOURCE SKILLS</p> <p>a) Identifying appropriate sources of information b) Using computer software c) Evaluating the quality & accuracy of web information d) Recognizing/ avoiding plagiarism</p>	<p>INFORMATION & BUSINESS RESOURCE SKILLS</p> <p>Students will analyze business problems, situations and opportunities by identifying and applying appropriate and relevant information.</p>
2	<p>CRITICAL THINKING</p> <p>a) Use acquired knowledge to understand new concepts b) Apply knowledge to practical situations and make informed decisions; c) Analyze complex concepts logically and from multiple perspectives; d) Synthesize information and arrive at reasoned conclusions; e) Evaluate the logic, validity, and relevance of data and conclusions</p>	<p>CRITICAL THINKING IN BUSINESS</p> <p>Students will arrive at reasoned conclusions and make informed decisions in assessing current and predicted business situations by applying course concepts learned across the curriculum.</p>
3	<p>INTEGRATION & APPLICATION OF KNOWLEDGE</p> <p>a) Enhance their personal lives; b) Meet professional standards and competencies; c) Further the goals of society; and d) Work across traditional course and disciplinary boundaries.</p>	<p>PROFESSIONAL SKILLS & COMPETENCIES</p> <p>Students will apply substantial knowledge and understanding in their chosen major in the study of business.</p>
4	<p>INTELLECTUAL DEPTH BREADTH & ADAPTIVENESS</p> <p>a) Show substantial knowledge and understanding of at least one field of study; b) Compare and contrast approaches to knowledge in different disciplines; c) Modify one's approach to an issue or problem based on the contexts and requirements of particular situations.</p>	<p>INTEGRATIVE BUSINESS REASONING</p> <p>Student will assimilate data from different sources, and use more than one business discipline to develop a model to solve a business problem.</p>
5	<p>UNDERSTANDING SOCIETY & CULTURE</p> <p>a) Compare and contrast the range of diversity and universality in human history, societies, and ways of life b) Analyze and understand the interconnectedness of global and local communities c) Operate with civility in a complex world.</p>	<p>DIVERSITY & COLLABORATION IN BUSINESS</p> <p>Students will use their understanding of the importance of diverse worldviews and practices, cultural competencies, and sociocultural and socioeconomic factors to foster cooperation and teamwork.</p>
6	<p>VALUES & ETHICS</p> <p>a) make informed and principled choices and to foresee consequences of these choices; b) explore, understand, and cultivate an appreciation for beauty and art; c) understand ethical principles within diverse cultural, social, environmental and personal settings</p>	<p>BUSINESS & MANAGEMENT ETHICS</p> <p>Students will make business decisions that seek to align their personal values and beliefs (integrity) and respond to the expectations of others, the organization, and society.</p>

Focus on PUL/UBLG 1B: Quantitative Skills

According to analysis and discussion among KIAC members, the IMIR PUL Reports and our own AoL Reports continue to indicate that our students do not meet faculty expectations in the area of Quantitative Skills.

One possible contributing factor was alluded to in the above section: the former program goals (PBLs) did not contain an explicit reference to Quantitative Skills. Thus, the expectations were unclear; and, with unclear expectations, assessment is nearly impossible.

The KIAC responded to this by conducting a Primary Trait Analysis to determine an accepted goal, outcome and trait model for PUL/UBLG 1B. An initial PTA was conducted by the KIAC chair and the Assessment Specialist and presented to the KIAC members. After much discussion and revision, the following was agreed upon by the KIAC.

GOAL QUANTITATIVE SKILLS

OBJECTIVE Student will perform quantitative analysis and use the results to make decisions about business resources

TRAITS

ORGANIZATION // Collection, sorting & organization of relevant data

CONCEPTUALIZATION // Estimation & conceptualization of reasonable set of quantitative outcomes

CALCULATION // Utilization of appropriate formula, calculator, or spreadsheet to generate preliminary quantitative analysis

EVALUATION // Evaluation of preliminary results within context of business problem or opportunity for reasonableness, applicability and usefulness in decision making

SYNTHESIS // Revision and expansion of quantitative analysis to include contingencies, actionable responses and conjecture

SOLUTION // Reporting & decision-making supported by professional presentation and interpretation of quantitative analysis

This document was then used by the KIAC members to create a standardized rubric for assessing PUL/UBLG 1B. This rubric (along with the GOAL/OUTCOME/TRAIT guide shown above) will be used to create a more defined set of expectations and standards with which to judge our students' progress in Quantitative Skills.

Please see the next page for the Trait Guide Rubric for PUL/UBLG 1B.

In the upcoming year, the KIAC plans to put an equal amount of attention and effort into an analysis, PTA and rubric development of another PUL/UBLG. The targeted goal will be decided upon at the first KIAC meeting of the 2014-15 academic year.

GOAL						
QUANTITATIVE SKILLS						
OUTCOME						
Student will perform quantitative analysis & use the results to make decisions about business resources						
CRITERIA						
TRAIT	Description	Very Effective	Effective	Somewhat Effective	Not Effective	Not Applicable
Organization	Collection, sorting & organization of relevant data					
Calculation	Utilization of appropriate formula, calculator or spreadsheet to generate preliminary quantitative outcome					
Evaluation	Evaluation of preliminary results within context of business problem or opportunity for reasonableness, applicability & usefulness in decision making					
Synthesis	Revision & expansion of analysis to include contingencies, actionable responses & conjecture					
Solution	Reporting & decision-making supported by professional presentation & interpretation					

Advisory Memo

In the prior year PRAC Report, much was discussed about changing the role of assessment from compliance to advice; that is, using the results of assessment reporting to make suggestions, recommendations and advisory statements to the various stakeholders in Kelley's efforts to promote continuous improvement.

The Advisory Memo could be considered the final "product" of the work conducted by the KIAC during the preceding academic year to initiate the process of "closing the loop". An initial kickoff for the year's action by the KIAC will be to follow up on planning or progress made by the KIAC's stakeholders in response to the Advisory Memo.

The Advisory Memo distributed subsequent to the 2013-14 year can be reviewed on the following page.

May 23, 2014

From: Todd Roberson, Chair (on behalf of the full committee)
To: Ken Carow, Peggy Lee, and Kim Saxton
Cc: Eric Metzler

Colleagues –

Each academic year the KIAC collects Assurance of Learning (AoL) reports prepared by faculty subsequent to an assessment of their course with regard to the Principles of Undergraduate Learning (PULs) and Undergraduate Business Learning Goals (UBLGs). Our committee reviews these reports, looking for common themes and areas of opportunity for continuous improvement. You are included in the distribution of this memo because you lead a committee that might be able to take the following items under consideration.

Our analysis for the 2013-14 academic years suggests the following action items:

- **FACULTY TRAINING & DEVELOPMENT OPPORTUNITIES TO PROMOTE & INCENTIVIZE PREPARATION**

AoL reports suggest that faculty are not satisfied with the level of pre-class preparation by students. KIAC suggests the Committee for Teaching Excellence organize (perhaps with the assistance of the Center for Teaching and Learning) a faculty roundtable to disseminate ideas for incentivizing preparation.

- **ACROSS THE BOARD UNDERGRADUATE ATTENDANCE & CONDUCT POLICY**

Faculty continues to express dissatisfaction with attendance (which is related to preparation as noted above) and classroom conduct of undergraduates. KIAC suggests discussion and action by the Undergraduate Policy Committee to explore and implement across the board written and enforced policies on attendance and classroom conduct.

- **A REVIEW OF UNDERGRATE PRINCIPLES, EXPECTATIONS & STANDARDS FOR WRITING**

AoL reports indicate widespread 1) concern about the writing skills of undergraduates and 2) wide variation on what exactly constitutes “good writing”. KIAC speculates that these concerns might be, in part, due to the lack of explicit writing standards. KIAC suggests that the Undergraduate Policy Committee discuss and evaluate the desirability of adopting state writing standards.

Please note that the above items are advisory only and are not meant to in any way set your committee agenda for the upcoming academic year. That said; please do not hesitate to contact me if the KIAC can be of any assistance in any way.

Thanks for all you do –

Todd Roberson
KIAC Chair

PUL Assessment Results

The results of the 2012-13 PUL direct assessments (combining S2010 – S2013) were analyzed by the KIAC during the fall semester of 2013. These results were compared with the indirect ratings offered by students. The overall consensus was that Quantitative Skills (PUL/UBLG 1B) needed attention; thus the emphasis during the year upon developing a primary trait analysis and standardized rubric to assess PUL/UBLG 1B.

A comparative summary of the 2013-14 PUL (combining S2010 – S2014) direct assessments follows:

KELLEY FACULTY RATINGS

MAJOR EMPHASIS – MEAN RATING								
PUL	100 Level		200 Level		300 Level		400 Level	
Terminal Semester	S2013	S2014	S2013	S2014	S2013	S2014	S2013	S2014
1A	2.94	2.96	3.54	3.36	2.95	2.95	3.09	3.03
1B			2.59	2.59	2.53	2.72	2.89	2.86
1C			3.00	3.00	3.26	3.26		
2	2.83	2.83	2.68	2.68	2.70	2.70	3.19	3.25
3	2.98	3.08		3.15	3.02	3.14	3.30	3.25
4					2.68	2.76	2.92	3.09
5							2.98	2.87
6								
COMPOSITE	2.91	2.96		2.84	2.79	2.85	3.05	3.03

MODERATE EMPHASIS – MEAN RATING								
PUL	100 Level		200 Level		300 Level		400 Level	
Terminal Semester	S2013	S2014	S2013	S2014	S2013	S2014	S2013	S2014
1A	3.00	3.09			2.93	2.83	3.15	3.17
1B					2.50	2.54	2.46	2.46
1C				2.92		3.50	3.39	3.44
2	2.50	2.80			2.94	3.07	3.05	3.01
3			2.82	2.82	2.95	2.95	3.15	3.17
4			2.57	2.57	2.34	2.34	2.67	2.66
5					3.73	3.56	3.84	3.84
6			2.94	2.94	3.00	3.00		
COMPOSITE	2.78	2.95	2.64	2.64	2.78	2.84	3.14	3.13

KELLEY VS. IUPUI FACULTY RATINGS

MAJOR EMPHASIS – 400 LEVEL COURSES – S2010 to S2014								
PUL	1A	1B	1C	2	3	4	5	6
KELLEY	3.03	2.86		3.25	3.25	3.09	2.87	
IUPUI	3.28	3.04	3.12	3.24	3.43	3.39	3.29	3.44

THE UPCOMING YEAR: RESPONDING TO PUL/UBLG RESULTS

In the Kelley School of Business, analysis of, and response to, PUL Assessments is the responsibility of the Kelley Indianapolis Assessment Committee (KIAC). The analysis is generally done early in the fall semester with corrective advisory action proposed by the end of the fall semester via the drafting of an Advisory Memo (see prior example).

It is the opinion of the chair that the newly constituted KIAC membership, working the Kelley Undergraduate Policy Committee, now has sufficient training and institutional longevity to address the analysis of the PUL/UBLG results in unified and systematic manner; this was not true in the past.

As this process begins in the fall semester of 2014, the following questions are scheduled to be addressed in the KIAC working agenda:

1. What are the standards or expectations of Kelley with regard to individual and composite PUL ratings?
2. Are there desired distribution attributes for each PUL/UBLG? For instance, what percentage of students should be rated Effective in a given PUL/UBLG?
3. Are there patterns in the PUL/UBLG rankings from 2013 to 2014 and in Kelley composites versus IUPUI overall rankings?
4. How, if at all, should these results be shared with students, groups of students and external shareholders?
5. Where the KIAC deems the results substandard, is there adequate coverage in major and moderate emphasis within the Kelley curriculum?

It is the plan of the committee chair to work with the KIAC to answer these questions and make the results available in an Advisory Memo to the Kelley administration and the faculty.

PART THREE: ASSOCIATE DEAN'S COMMENTS

Assessment is an integral part of feedback on program goals and outcomes. The assessment committee continues to refine and improve our assessment program. This includes increasing the quality of our measurements as well as streamlining the process to reduce faculty time in completing assessments. Examples include the linking of the PULs (IUPUI goals) and the UBLGs (Business AACSB goals), streamlining the consistency of the faculty communications, and streamlining the efficiency of designing and improving rubrics. This next year the committee is focus will be on curriculum mapping for each of the programs and faculty communication.

Assessment has become well accepted by many of the faculty, but there are still a few hold-outs. The dean's office is communicating that assessment is an integral part of the teaching function and is essential to program improvement and our accreditation. Assessment is not only essential to our NCA accreditation, but also AACSB accreditation. Not being accredited is an unacceptable risk to the reputation of the Kelley School of Business. Essentially, without accreditation we would not be the Kelley School. It is part of our reputation and our culture.