



Consultation Guidelines and Expectations

The Department of Student Affairs Assessment (DSAA) is pleased you have chosen to utilize our assessment consulting services. This document serves as an overview of our consultation process and guidelines to complement the intake discussion you will have with your DSAA consultant. Please read carefully and contact your consultant with any questions or concerns.

Intake Meeting

- This is your initial meeting with your consultant. You will discuss your assessment project, timeline, the role the DSAA consultant will play, and the guidelines and expectations for the process.
- During this meeting, you and your consultant will complete the Intake Form, which serves as the consulting contract. The Form has three purposes:
 - Establishes your timeline for the project (e.g. due dates for drafts of questionnaires, date of launch, etc.)
 - Defines what specific types of assistance the consultant will provide
 - Communicates the expectations we have of you and the expectations you have of our office.
- What to bring:
 - Basic information about the program or service you are assessing (e.g. brochure, mission statement, learning objectives and outcomes)
 - Materials from any assessments that have been done in the past (e.g. copy of questionnaire, focus group questions or notes, report of results)
 - Brainstorming ideas, rough draft, or any other work you have already done for the assessment project. NOTE: Some clients may be coming in for assistance to learn where to begin in developing an assessment project and will not have a draft. This is perfectly okay!
 - Notebook and pen

Timelines

- It is imperative that you adhere to the timeline you and your consultant create.
- We understand that sometimes circumstances require adjusting the timeline of a project or putting it on hold. We are willing to work with you in these situations as necessary, but we require that you communicate with us *immediately* upon learning that you need to make changes to your timeline.
- In almost all cases, we cannot reduce the amount of time it takes to perform certain tasks, but we can adjust or modify deadlines. Please note the following:
 - A minimum of **three days** is required to load an online questionnaire onto our servers.
 - A minimum of **one week** is required to receive feedback from your consultant on a draft of an assessment instrument.



- DSAA handles dozens of projects at one time and cannot best support the assessment efforts in the Division without a structured management system. Thank you for your understanding and for helping us achieve this goal by adhering to the aforementioned guidelines.

Drafts of Online Questionnaires

- If your project involves our office loading an online questionnaire for you, you must have your questionnaire in **final form** before we begin building the questionnaire in our software program. ALL content changes must be made before we reach this step in the process. This is due to the technical formatting aspects of the software. Editing questionnaires once they have already been loaded into the software is problematic and results in many complications; thus, we will only load questionnaires that are in final form.
- All stakeholders (e.g. your supervisor, co-workers, etc.) should provide content feedback before we load the questionnaire.
- Loading questionnaires onto the Web server is a process that takes several hours. Because of this, again, we cannot make content changes once a questionnaire has been loaded. You will be asked to review the loaded questionnaire for the purpose of verifying formatting and technical aspects. It is your responsibility to confirm the accuracy and functionality of the instrument.
- In a few cases, there may be formatting or other technical errors that will not be identifiable until the questionnaire is loaded; in these cases we will gladly do a reload to correct the errors. Feel free to have multiple users test the formatting and technical workings of the questionnaire, but again, please test your content **BEFORE** the loading stage. Please send us all technical changes at one time; we will only reload once.
- If you are sending your questionnaire to a random sample we have pulled for you, it is especially critical that the questionnaire be thoroughly tested for errors before you send. Because survey fatigue is a very real problem, we cannot pull a second sample for you if your first solicitation contains a link to a questionnaire with errors.

Project Management: Follow-up and Staying on Track

- To ensure your project progresses on schedule, your DSAA consultant will adhere to the agreed upon timeline. It is your responsibility, however, to ensure we receive the required materials from you on time. This means that we will not send you reminders requesting overdue drafts, materials, etc. Your consultant cannot adhere to the timeline without receiving all necessary materials from you.
- As mentioned before, late items will in most cases necessitate a modified timeline. If you know you will miss deadlines due to extenuating circumstances, please let us know as soon as possible so we can work with you to create an alternate plan.



Overall

- DSAA's approach to consulting is to educate and empower our clients. We will offer guidance, feedback, and technical assistance; this will equip you with the necessary skills to design and implement your project.
- Earlier is better! Take advantage of slower times in your office (e.g. summers, holidays, spring break) and plan ahead for assessment. The longer time we have to work with you on planning and implementing your assessment project, the better we can assist you. We are happy to assist you in preparing projects that may not be implemented for six months or even longer.
- We thank you for your interest and willingness to partake in assessment. We hope that we can help you maximize the success of your project through this consultation process.