

The Strategic Evaluation Module (SEM): An Intranet Application for  
Institutional Planning, Evaluation and Accreditation

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A key aspect of the contemporary accreditation process is to demonstrate an effective process for planning and evaluation. Institutions must show processes and products from a strategic practice of goal setting and evaluation of projects. Yet these operations must be fitted to particular situation and people in order to be more than bureaucratic exercises to meet external accountability. There must be a mix of order and flexibility in the system of planning and evaluation.

In 2002 the Reformed Theological Seminary (RTS) developed a web-based system of planning and evaluation in order to meet the standards of the regional accreditation agency, Southern Association of Colleges and Schools (SACS). Given the five distributed campus site of the seminary (Jackson, Orlando, Charlotte, D. C., and Atlanta) plus a Virtual campus, an intranet solution was required. The aim was to provide a tool that fostered more unity in planning and evaluation; yet, allowed for innovation at each specific location and by each staff member. These are the purposes of the Strategic Evaluation Module (SEM).

#### *Strategic Planning*

The overall approach to planning and evaluation was to construct a process that guides the user from institutional purpose to long- and short-term institutional strategies to unit goals and, finally, projects for achieving goals in particular units of the seminary. An institutional purpose is composed of core values that do not change. Each one-year and ten-year strategy should comport with the purpose. Using these school strategies, the supervisor for a department or campus compiles annual goals as guidance for the relevant staff and review by the leadership. Then, for the actual work, managers in a particular unit compose projects in order to reach the articulated goals.

#### *Planned Project Evaluation*

The project management cycle was designed based on the needs of the institution, the requirements of the accreditation agencies, and the standards in the field of educational evaluation. A three-phased model was used to develop the routine for planning and evaluation at the operational level: Plan, Manage and Evaluate. With the approval of a Supervisor, any manager can write up a

proposal for a project in the Plan mode. If approved by the supervisor, then the manager can build a team and begin the series of meetings that will enable the teamwork for completion of the product or service model. (Individuals can use SEM as well.) Upon a delivery of the project by the manager and team, approval by the supervisor moves the manager over to the third phase, Evaluate. Results are obtained, Recommendations are made and reports Recycle into the “nervous system” of the school.

#### *Wizards for Strategic Evaluation*

The SEM gives the users automated guidance for completing nine components of a plan, multiple productive meetings and nine steps of evaluation of each project. By submitting brief sentences and relevant attachments, the plan begins with a “wizard” to write a problem statement based on needs, benefits and criteria for success. With a feasibility study, internal and external resources and constraints are cited and become the basis for necessary features of the product or service. The plan concludes, again with relevant wizards, with a “to-do list” and an estimate of costs. A list of assumptions is written that is critical for success, but are uncertain at present. These will be checked and adjusted over the course of the project as part of a “discovery-driven” process.

Moving to the Manage phase, the first meeting is the “launch”. As with all the called meetings, the manager announces time and place as well as assigns homework for inspection ... all via the intranet application. For the launch meeting, the inspection should be of the plan. Prepared for discussion, the agenda is a discussion with action steps at the close of the meeting. When another meeting is needed, the manager calls it. This continues until the project is concluded with the “delivery” meeting. Upon approval, evaluation begins as described briefly above.

The manager and assistants complete data collection, arrangement and analysis. The manager writes reports with subsequent recommendations to the supervisor, who writes a report to the management council. The council gives little or much feedback to the group and to the president about the data and recommendations. Best practices are encouraged and applied elsewhere throughout the institution. Thus, projects consistent with institutional strategies are evaluated to the benefit of the corporate purpose. And the whole process is available for review by any of the over 200 staff and faculty on the RTS intranet.