



Build. Align. Validate. Generate.

# Institutional Effectiveness Standalone™ User Guide

For IE Administrators

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Step-by-step guide with annotated screens • October 2026 edition

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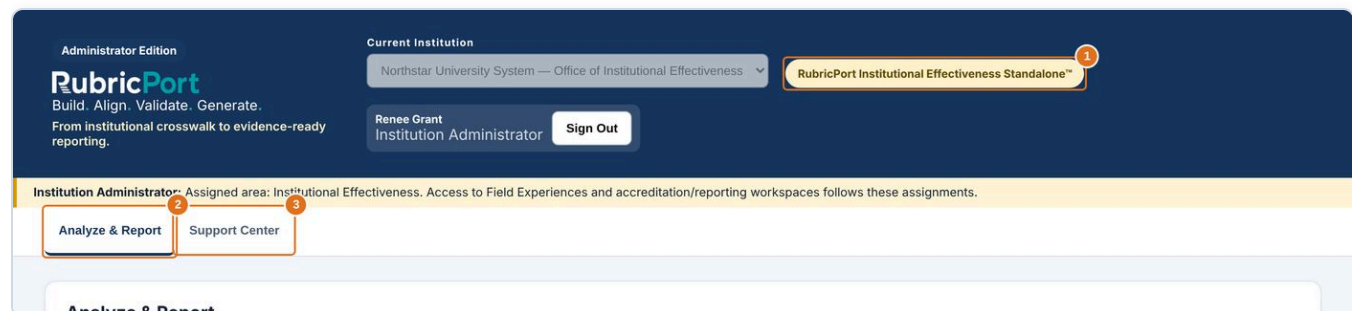
# 1. Getting Started

**RubricPort Institutional Effectiveness Standalone™** (IE Standalone) is a separately licensed RubricPort product for institutions — or a university's Office of Institutional Effectiveness — that need institution-wide assessment without the full RubricPort platform. It is not a level of Build, Analyze, or Complete; it is its own product.

- Organize assessment by **institutional assessment areas** (for example General Education, the Library, or Student Success) instead of crosswalk Programs.
- Bring in prior results from **Anthology, another assessment system, or a generic CSV / Excel file**, map them to your areas, and approve them as clearly labeled historical evidence.
- Write institution-specific **Student Learning Outcomes**, build an **Assessment Plan**, link approved historical evidence to measures, record **analysis and findings**, and track **improvement actions** through follow-up.
- With the MSCHE configuration, review the **MSCHE Evidence** chain and **generate the Institutional Effectiveness Package**.
- Optionally, use **Institutional Data Sharing** to see read-only, college-approved summary results from the university's own RubricPort colleges.

| IE Configuration                                                                            | Includes                                                                                                                                                               | Workspace title                                   |
|---------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------------------------------------------|
| <b>Institutional Assessment &amp; Continuous Improvement</b> — \$9,000/year + \$2,000 setup | Assessment areas, historical import, Assessment Cycle, SLO Setup, Assessment Plan, Results & Analysis, Improvement Actions, Alignment Map, Institutional Data Sharing. | Institutional Assessment & Continuous Improvement |
| <b>Institutional Effectiveness + MSCHE</b> — \$12,000/year + \$3,000 setup                  | Everything above, plus the <b>MSCHE Evidence</b> tab and <b>Generate Institutional Effectiveness Package</b> .                                                         | Institutional Effectiveness / MSCHE               |

**IMPORTANT** You see only **Analyze & Report** (the IE workspace) and the **Support Center**. Your account needs the **Institutional Effectiveness** area.



After you sign in.

- Product badge.
- Analyze & Report — the IE workspace.
- Support Center.

### Institutional Effectiveness / MSCHE

**Purpose:** Organize institution-wide academic assessment evidence from RubricPort data. This workspace keeps Student Learning Outcomes (SLOs), curriculum maps, assessment measures, multi-year assessment timelines, results, findings, improvement actions, and follow-up evidence together. It is separate from AAQEP, which supports educator-preparation accreditation.

Assessment Cycle  
Current Cycle

Program  
All Programs

SLO  
All SLOs

Assessment Year  
All Assessment Years

Status  
All Statuses

Clear Filters

Filters apply across the Institutional Effectiveness workspace and to package generation. Search controls within each section further narrow the displayed records.

Refresh Institutional Effectiveness Workspace

Generate Institutional Effectiveness Package

#### Institutional Assessment Area Setup

For standalone institutions without a RubricPort Program catalog, create assessment areas here before linking outcomes or importing external results. Existing Programs remain unchanged.

e.g., General Education

Add Assessment Area

#### Historical Data Migration / Legacy Import

Institutional Data Sharing

#### ▼ 1. Assessment Cycle

Use the cycle to identify the multi-year assessment period your institution is working within. The dates below organize measures and evidence; they do not alter assessment scores.

Cycle ID  
2024-2027

Cycle Label  
Three-Year Institutional Assessment Cycle

The IE workspace.

- 1 Workspace title.
- 2 Filters.
- 3 Refresh.
- 4 Generate Institutional Effectiveness Package — MSCHE configuration only.

## 2. Set Up Areas and the Cycle

- 1 **Institutional Assessment Area Setup** → type an area name → **Add Assessment Area**. Add every area first.
- 2 **1. Assessment Cycle** → Cycle ID, Cycle Label, Start and End Dates → **Save Assessment Cycle**.

*Assessment areas.*

- 1 Area name.
- 2 Add Assessment Area.

*Assessment cycle.*

- 1 Cycle ID.
- 2 Cycle Label.
- 3 Start Date.
- 4 End Date.
- 5 Save.

### 3. Import Prior Results

- 1 Open **Historical Data Migration / Legacy Import**.
- 2 Choose the **Historical Source**, a **Dataset Label**, and the file → **Preview & Validate**.
- 3 In **Assessment Mapping Review**, enter the assessment area for each instrument (or use **Bulk Canonical Program**).
- 4 Select **Approve Historical Import** and check **Historical Dataset History**.

**GOOD TO KNOW** A generic CSV needs **Assessment Instrument** and **Criterion** columns; add Score, Student ID, Assessor, Course ID, Term, and Reporting Period when you have them.

▼ Historical Data Migration / Legacy Import

Administrative transition utility for prior-system assessment history. Historical/external records remain separately identified and never replace RubricPort-native source data.

Historical Source

Generic CSV / Excel

Reporting Period / Cycle (Optional Override)

AY 2025-26

Preview & Validate

Approve Historical Import

Dataset Label

Legacy Assessment Results 2025-26

Historical Results File

Choose File No file chosen

Choose a validated prior-system file, then Preview & Validate before approval.

Historical Dataset History

Previewed and approved datasets are retained here with source, reporting period, status, import/preview date, and importer metadata. Approved records remain separately tagged historical/external evidence; RubricPort-native data remains the primary everyday reporting source.

| Dataset                                   | Source              | Academic Year | Detected Terms         | Source Reporting Groups              | Optional Label | Rows | Assessments | Programs Mapped | Saved Mappings | Status    | Imported / Previewed | By                       | Action         |
|-------------------------------------------|---------------------|---------------|------------------------|--------------------------------------|----------------|------|-------------|-----------------|----------------|-----------|----------------------|--------------------------|----------------|
| Legacy Assessment Results 2025-26 (guide) | Generic CSV / Excel | AY25, AY26    | Fall 2025, Spring 2026 | Fall/Winter AY25, Spring/Summer AY26 | AY 2025-26     | 456  | 3           | 0               | 0              | Previewed | 2026-10-14 13:39:23  | rgrant@northstar-ie.demo | Resume Mapping |

*Historical import.*

- 1 Historical Source.
- 2 Dataset Label.
- 3 Reporting Period (optional).
- 4 File.
- 5 Preview & Validate.
- 6 Approve Historical Import.

| Assessment Instrument                                                 | Matched Rubric | Program              | Course ID | Confidence | Review Status        | Program Review / Override  |
|-----------------------------------------------------------------------|----------------|----------------------|-----------|------------|----------------------|----------------------------|
| <input checked="" type="checkbox"/> Information Literacy Rubric       | —              | Assessment Not Found | —         | Review     | Assessment Not Found | Library & Learning Commons |
| <input checked="" type="checkbox"/> Quantitative Reasoning Assessment | —              | Assessment Not Found | —         | Review     | Assessment Not Found | General Education          |
| <input checked="" type="checkbox"/> Written Communication Rubric      | —              | Assessment Not Found | —         | Review     | Assessment Not Found | General Education          |

[Previous](#)
Page 1 of 1 - 3 total assessment(s)
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Map each instrument to an area.

## 4. Outcomes and Measures

- 1 SLO Setup → Create SLO → area, code, status, statement → Add / Update SLO.
- 2 Assessment Plan → + Add Assessment Measure → instrument, course, type, benchmark, assessment year → save.
- 3 Open the measure (View / Edit), choose the **Approved Historical Dataset**, tick the confirmation, and **Save Assessment Measure**.

▼ 2. Student Learning Outcomes (SLOs)

An SLO states what students should know or be able to do. Add the institution-approved outcome language once, then connect courses and measures to that outcome.

Program: Student Success & Retention

SLO Code: SS-2

Status: Active

SLO Statement: Students will develop an academic plan that connects their goals to program requirements.

Add / Update SLO Close

Search SLOs: SLO code or statement

Filter Status: All Statuses

Bulk Status: Choose status

Apply to Selected Export Filtered CSV

| Program                                    | SLO  | Statement                                                                                        | Status |
|--------------------------------------------|------|--------------------------------------------------------------------------------------------------|--------|
| <input type="checkbox"/> General Education | GE-1 | Students will compose clear, well-organized written arguments supported by appropriate evidence. | Active |
| <input type="checkbox"/> General Education | GE-2 | Students will interpret, represent, and apply quantitative information to solve problems.        | Active |

Create an SLO.

- 1 Area.
- 2 SLO Code.
- 3 Status.
- 4 SLO Statement.
- 5 Add / Update SLO.

Edit Assessment Measure — GE-1  
Edit the selected Assessment Plan measure without leaving this tab. This does not edit the SLO definition.

Assessment Measure

Written Communication Rubric

Course  
ENG 101

Type  
Direct

Assessment Year  
AY 2024-25

Benchmark / Target  
70% of students score 3 or higher on each criterion (4-point scale)

Approved Historical Dataset (optional) Legacy Assessment Results 2024-25

☒ Confirm this dataset is appropriate for this Program, Assessment Instrument, and reporting period.

Historical results remain on their source scale. Linking does not modify imported records or establish percentage attainment.

Save Assessment Measure Close

Link approved evidence to a measure.

- 1 Instrument.
- 2 Benchmark.
- 3 Approved Historical Dataset.
- 4 Confirmation.
- 5 Save.

## 5. Analyze, Improve, Document

- 1 **Results & Analysis** → **View / Edit** → review the read-only historical evidence → enter **Analysis / Findings** → save.
- 2 **Improvement Actions** → **View / Edit** → finding, action, follow-up status and date, notes → save.
- 3 **MSCHE Evidence** and **Alignment Map** → close any \*Not entered\* gaps.
- 4 **Generate Institutional Effectiveness Package** (MSCHE configuration).

Edit Results & Analysis — GE-1  
Review the selected assessment result and edit its institutional analysis without leaving Results & Analysis.  
**Measure:** Written Communication Rubric  
**Course:** ENG 101  
**Result:** —  
**Target:** —

**Approved Historical Evidence (read-only)**  
**Dataset:** Legacy Assessment Results 2024-25  
**Source:** Legacy Assessment System  
**Reporting period:** AY 2024-25  
**Use confirmed:** Yes  
**Source-scale summary:** Not available. Comparable source scoring scale is not documented for every matching record; aggregate mean withheld.  
Historical source records are not modified; no percentage or target-attainment status is inferred.

**Analysis / Findings**  
Use of Evidence was the lowest-scoring criterion in both terms; Thesis & Purpose was strongest.

Save Results & Analysis Close

*Results & Analysis for one measure.*

- 1 Approved Historical Evidence (read-only).
- 2 Analysis / Findings.
- 3 Save.

**WHY THIS MATTERS** RubricPort shows a source-scale average only when every matching record documents the same scoring scale, and never converts historical results to a percentage.

## 6. College Summaries (Data Sharing)

- 1 Your Provider links your workspace to each college under the university affiliation.
- 2 **Institutional Data Sharing** → **Select affiliated college** → **Request Connection**.
- 3 The college's Institution Administrator approves it in their Support Center.
- 4 Select **Load Approved Summaries**.

▼ Institutional Data Sharing

Request access to another licensed college's approved assessment summaries. The college must approve sharing. Approved connections can provide read-only assessment aggregates. Individual submissions and groups smaller than five are not shared.

Select affiliated college

Request Connection

Refresh Connections

| IE workspace | College workspace | Status   | Action |
|--------------|-------------------|----------|--------|
| NSUIE        | NSUDEMO           | approved |        |
| NSUIE        | NSCC              | pending  |        |

Approved college assessment summaries

Load Approved Summaries

NSUDEMO

Minimum group size: 5; suppressed groups: 1. Raw scores are not scale-normalized.

No reportable groups of five or more assessed submissions.

*Institutional Data Sharing.*

- 1 Select affiliated college.
- 2 Request Connection.
- 3 Refresh Connections.
- 4 Connections.
- 5 Load Approved Summaries.
- 6 Approved summaries.

**IMPORTANT** Only aggregates for groups of five or more assessed submissions are shown — never student, faculty, or submission details.

## 7. Quick Fixes

| If...                                                                                             | Try this                                                                                                                               |
|---------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------|
| The IE Administrator sees<br>*Institutional Effectiveness<br>Administrator access is<br>required* | Add the <b>Institutional Effectiveness</b> area to the account (Provider: Administrator Accounts → Edit Areas).                        |
| *This institution is licensed for<br>Institutional Effectiveness<br>only*                         | The request was for an area outside IE Standalone. Only the IE workspace, historical import, and data sharing are included.            |
| *The IE + MSCHE<br>configuration is required for<br>accreditation package export*                 | The license uses the Institutional Assessment configuration. The Provider can change the IE Configuration.                             |
| An assessment area is missing<br>from a dropdown                                                  | Add it in <b>Institutional Assessment Area Setup</b> , then select <b>Refresh Institutional Effectiveness Workspace</b> .              |
| *Program mapping must use<br>an active canonical RubricPort<br>Program*                           | Type the assessment area name exactly as created, or create the area first.                                                            |
| *Historical source differs from<br>the saved preview*                                             | The staged file changed. Run <b>Preview &amp; Validate</b> again.                                                                      |
| *Generic CSV requires<br>Assessment Instrument and<br>Criterion columns*                          | Add or rename those two column headers.                                                                                                |
| *The selected SLO is not<br>saved for this Program*                                               | Assign the SLO to that area in SLO Setup before adding the measure.                                                                    |
| The historical evidence panel<br>says the mean is withheld                                        | The source file does not document a common scoring scale. Write the analysis from your source reports; nothing is wrong with the link. |
| The historical summary says<br>*No matching source records*                                       | Check that the measure's instrument name, area, and Assessment Year match the approved dataset's records and reporting period.         |
| A college is missing from<br>*Select affiliated college*                                          | Ask the Provider Administrator to link that college under the university affiliation.                                                  |
| *Load Approved Summaries*<br>shows no reportable groups                                           | No Program/assessment at that college has five or more assessed submissions yet; smaller groups are suppressed.                        |