



Discussion Facilitation Guide

Support Unit Assessment Report: *Findings, Use of Results, and Status Update*

What This Guide is For

This guide is meant to help staff talk through assessment results in plain language and turn that conversation into usable content for the assessment report in HelioCampus. By the end, your team should be able to clearly say: what you learned, what you plan to change next, and what happened after a change you made earlier.

Planning the Meeting

When should we meet? Assessment reports are submitted in July, so it helps to meet in late spring or early summer while the year's work is still fresh. Aligning this conversation with strategic planning sessions.

Who should be in the room? Invite the people who know the work, the data, and the day-to-day realities of the unit.

- Unit leaders and staff who carry out functions, make decisions, or track results
- Anyone who gathers or reviews data
- A note-taker who can capture key takeaways, decisions, and next steps
- Your unit or division Assessment Liaison
- Campus partners or collaborators, if they help deliver the service or use the results
- Student employees or other frontline staff, when their perspective would help explain what is working and what is not

What should be prepared before the meeting? Keep it simple and practical.

- This year's planned outcomes, measures, and targets
- This year's results
- Any reports, dashboards, survey summaries, usage numbers, or notes related to the outcome(s)
- A copy of the previous year's assessment report to review past results and actions

Why this helps in HelioCampus: Good preparation makes it much easier to write the Findings, Use of Results, and Status Update sections without scrambling for missing details.

During the Meeting

Part 1: Talk about what the results are telling you

Use questions like these to help the group name the main takeaways. Respond to the ones that best fit your unit's results and context.



- What stands out in the results right away?
- Where did things go well?
- Where did things fall short of what we'd like to see?
- What might explain these results?
- Are there limits to the data we should keep in mind?
- How do this year's results compare with previous years or other useful points of comparison?
- Do different groups seem to be having different experiences?
- Are there patterns or trends (by time of year, location, population, etc.)?

Part 2: Decide what to do next

Once you understand the results, shift the conversation to action. The goal is to choose a realistic next step that makes sense based on what you learned. You do not need to answer every question.

- What is the biggest issue or opportunity we should respond to?
- What do we think is causing it?
- What is one change we could realistically make (or start making) in the next few months?
 - Should we improve a process, revise a service, adjust communication, update training, strengthen a partnership?
- Is this change meant to help a particular group of students? If so, which students, and what makes this the right group to focus on?
- Who needs to be involved to make this happen?
- What resources or support will this take?
- What is the timeline?
- How will we be able to tell whether the change has made a difference?
- ***If the results were strong, what should we start doing to ensure performance stays strong?***

Part 3: Give an update on a change you already made

This section is about a change your unit described in an earlier report, not the new action you just chose. Think of it as answering these two questions: What did we do, and what difference did it make?

- What action or change did we say we were going to make in an earlier report?
- Did we actually make that change? Fully, partly, or not yet?
- What evidence do we have so far about the results of that change?
- What improved after the change, if anything?
- Did anything stay the same or get worse?
- Do we need to continue the change, revise it, expand it, or stop doing it?

After the Meeting

- Have the note-taker send a short summary of the discussion.
- Capture the main findings, the agreed-upon next step, the people responsible, and the proposed timeline.
- Use the notes to draft the report in HelioCampus while the conversation is still fresh.

Tip: If the group has a difficult time answering the Part 3 questions, that usually means the earlier action was not documented clearly enough or the follow-up evidence was not ultimately gathered. That is useful information too, and it is a sign to tighten the process for next year.

Helpful Sentence Starters – Optional

Section of report	Sentence Starters
Findings Statement	<p>“Our results showed X, compared with a target of Y...”</p> <p>“X% reported _____, while Y% reported _____...”</p> <p>“Among [group], X%...”</p>
Context for Findings	<p>“Compared with last year, the result changed from X to Y, possibly because...”</p> <p>“One possible reason for this result is...”</p> <p>“Another detail worth noting is...”</p>
Use of Results	<p>“Because of what we learned, we plan to...”</p> <p>“To build on this result, we will...”</p> <p>“In the upcoming year, our priority will be...”</p>
Status Update: <i>Describe an earlier action.</i>	<p>“Last year the results were _____, so we decided to...”</p> <p>“An earlier action we put into place was...”</p> <p>“In a previous report, we committed to...”</p>
Status Update: <i>What was the impact?</i>	<p>“After making this change, we saw...”</p> <p>“So far, the effect has been...”</p> <p>“Staff observations/data showed that...”</p> <p>“We still need to learn more about...”</p>