

Institutional Intelligence:

Building Assessment Ecosystems That Outlast Any Transition

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Continuous improvement is not the objective — it is the mechanism by which institutions reach their goals.

What Makes This Session Different

Exclusively for administrative & student support services staff

Built around the realities of your role — not academic assessment frameworks

Centers the leadership transition crisis

What happens to your department when key people leave?

Reframes assessment as a resilience mechanism

Not compliance. Not reporting. Institutional Intelligence.

Delivers immediately usable tools

Leave with a working prototype you can act on this week

Addresses the tacit knowledge crisis

The expertise that walks out the door with every departure

Session at a Glance

01	0:00–0:07	The Hook: When the Navigator Leaves	7 min
02	0:07–0:17	Reframe: Assessment as Institutional Intelligence	10 min
03	0:17–0:27	Activity 1: The Knowledge Audit	10 min
04	0:27–0:42	Activity 2: Building the Intelligence Brief	15 min
05	0:42–0:52	Low-Effort, High-Impact Assessment Routines	10 min
06	0:52–1:00	One True Thing: Commitment + Closing	8 min

00

Welcome + Icebreaker:

Name Your Hidden Expert

Icebreaker: Name Your Hidden Expert

2 MIN

Complete this sentence:



"The person in my department who holds the most irreplaceable knowledge is _____ because _____."



You CAN name yourself



Be specific — name one thing they uniquely know



You CANNOT say 'we all do' — pick one person

01

The Hook:

When the Navigator Leaves

5:00 PM. Friday.

The person who knows everything about how your department actually runs has accepted another position.

They're gone in two weeks.

What's written down?

What lives only in their head?

What do students lose while you rebuild?

Assessment: The Reframe

Assessment Usually Feels Like...

A compliance checkbox

An annual report no one reads

Something academics do

About proving performance

A burden added to daily work

Assessment Actually Can Be...

A knowledge protection system

A real-time decision-making compass

The foundation of operational stability

About preserving institutional memory

A mechanism embedded in daily work

Quick Poll

Show of hands — be honest, this is a safe space.



1

How many of you have experienced a significant leadership transition in your department in the last three years?

✦ Raise your hand if this is true for you.

2

How many of you wished there had been a cleaner handoff of institutional knowledge during that transition?

✦ Raise your hand if this is true for you.

3

How many of you currently have a documented system — beyond policy manuals — that captures what your department actually knows?

✦ Raise your hand if this is true for you.

02

Reframe:

Assessment as Institutional Intelligence

The Assessment Ecosystem Triptych

Three layers — most departments do one. Few do all three.

 **CAPTURE**
Tacit → Explicit

What do we know?

What do we do?

What works?

 **TRANSLATE**
Data → Insight

What does this mean?

What patterns emerge?

What are we learning?

 **TRANSMIT**
Insight → Story

Who needs to know?

How do we tell it?

What endures transitions?

Most admin departments do some CAPTURE. Almost none do TRANSMIT systematically. Transmission is the layer that protects institutional continuity through any leadership change.

The Tacit Knowledge Problem

Administrative departments hold two kinds of knowledge. One survives transitions. One doesn't.



EXPLICIT KNOWLEDGE

Survives transitions through files and systems

- Policies and procedures
- Position descriptions
- Annual reports and data
- Official processes and workflows
- System-held information (Nuventive, Banner, etc.)

TACIT KNOWLEDGE

Walks out the door with every departure ⚠️

- "How we really do this" — unwritten protocols
- Key stakeholder relationships and context
- Institutional history and political knowledge
- Workarounds and undocumented exceptions
- What NOT to do — hard-won experience

PAIR DISCUSSION — Segment 2

2 MIN

Turn to the person next to you.

In 60 seconds, name ONE thing about how your department operates that only 1–2 people currently know — something that would be lost if those people left tomorrow.

DEBRIEF AFTER:

Share patterns.

Applied Case Study

The Handoff That Happened

SCENARIO A – The Unplanned Exit

Dr. Marcus Webb has directed Student Retention Services for 13 years. His successor, Adrienne, inherits a shared drive and a Nuventive login. No tacit knowledge register. No relationship map. No documented protocols.

Adrienne spends six months rebuilding relationships, relearning undocumented systems, and recreating a caseload management tool Dr. Webb kept in his head.

Two cohorts of at-risk students receive inconsistent outreach. Retention drops 4 points.

SCENARIO B – The Prepared Transition

Same department. Same transition. But Dr. Webb's team maintained a Department Intelligence Brief for two years: 11 tacit knowledge entries, a Relationship Map, an Evidence Portfolio with 3 indicators, and a Continuity Narrative.

Adrienne reads the DIB on Day 1. Contacts Financial Aid in Week 1 using the relationship context. Fully operational by Week 6.

Next cohort's retention rate holds.

The ONLY structural difference between Scenario A and Scenario B: the Department Intelligence Brief.

CASE STUDY SMALL GROUP DISCUSSION

7 MIN

Groups of 3–4 | Same table groups

1 What specific elements in Scenario B made the difference? Name at least three.

2 What is one thing in Scenario A that could have been documented — but wasn't?

3 Which Scenario — A or B — more closely resembles your current department? Be honest.

DEBRIEF (5 min): Hear from 2–3 groups

PRIZE ROUND 1

Assessment Reality Check

Pens down. Ears up.

Q1

According to today's session, what is the PRIMARY purpose of assessment in administrative and student support services departments?

A

To meet accreditation requirements

C

To serve as the MECHANISM by which departments reach their institutional goals

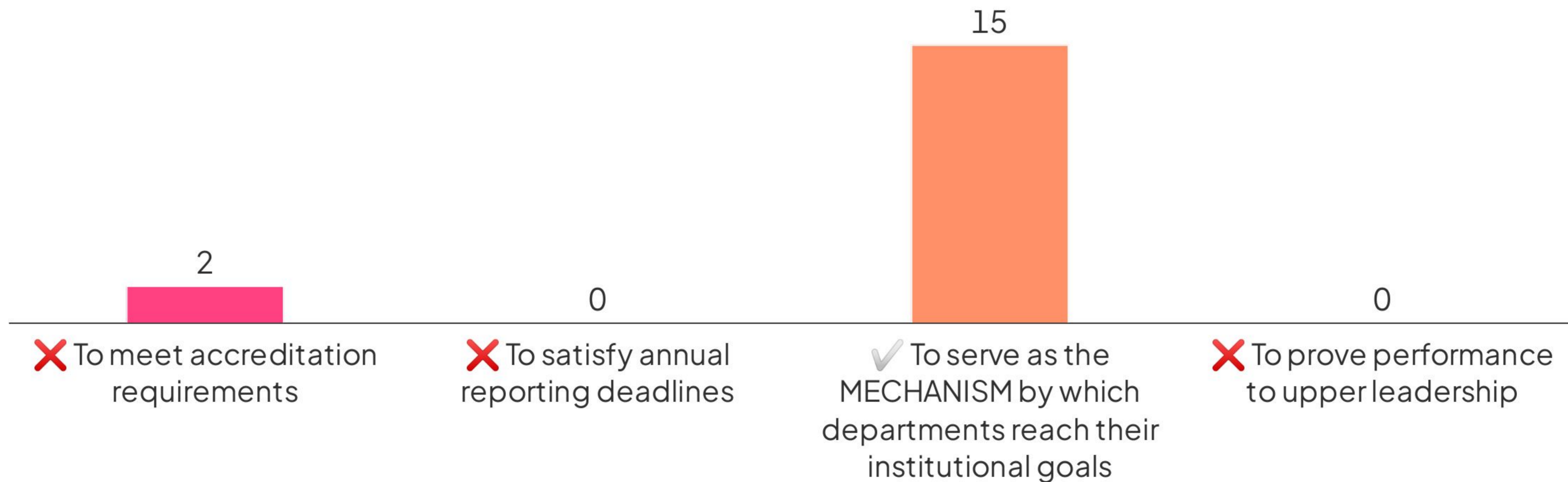
B

To satisfy annual reporting deadlines

D

To prove performance to upper leadership

According to today's session, what is the PRIMARY purpose of assessment in administrative and student support services departments?



Leaderboard

18 players



03

Activity 1:

The Knowledge Audit

ACTIVITY 1 – The Knowledge Audit | Worksheet 1

10 MIN

Column A Explicit Knowledge

What is already written down and documented in your department?

Column B Tacit Knowledge

What knowledge lives in only 1–2 people's heads right now?

Column C Transition Risk

For each Column B item: what happens to students or operations if a new leader doesn't know this?

PUSH FURTHER: After your first 3 Column B items — what is the context behind item 1? What relationship enables item 2? What institutional history explains item 3?

04

Activity 2:

Building the Department Intelligence Brief

The Department Intelligence Brief (DIB)

A living, one-page document that tells your department's story in a way that survives any transition.

1

Mission Anchor

Why your department exists. What would be lost if it didn't. One sentence that grounds all assessment activity.

"Our department exists to _____, so that students/TSU can _____."

2

Evidence Portfolio

The 3–5 data points that tell your essential story — not everything you collect, but the ones that illuminate purpose and impact.

The metrics that answer: "Prove your department is working."

3

Tacit Knowledge Register

The undocumented practices, relationships, and context that new leadership must know. Column B from your Knowledge Audit.

Everything that currently walks out the door with departing staff.

4

Continuity Narrative

A 3-sentence department story: what you do, what it produces, and why it is irreplaceable to TSU's mission.

The document a new director reads on Day 1 and understands everything that matters.

The Mission Anchor

Complete this sentence for your department:

1

"Our department exists to _____, so that students/TSU can _____. Without us, _____ would happen."

2

Identify one OUTCOME (not an activity) that proves your department is working.

3

Could a new VP read this and immediately understand your department's purpose? Test it.

The Evidence Portfolio

If a new VP asked: "Show me your department's impact in 3 data points" — what would you show them?

1 List your 3 most MEANINGFUL indicators. Not the easiest to collect — the ones that genuinely tell your story.

2 For each: Is this currently collected? Who owns it? Where does it live? What decision could it drive?

3 Flag any indicator you wish you had but currently don't collect.

The Tacit Knowledge Register

Transfer your top 3 Column B items from the Knowledge Audit directly into Worksheet 2:

1 For each Column B item: Who currently holds this knowledge? Has it ever been shared with anyone else?

2 What would be the single most useful way to document it? (Protocol? Map? Recorded walkthrough? Narrative?)

3 HALF-DAY PUSH: This Register is what made Scenario B possible. Name one item that would have prevented something from breaking in Scenario A.

The Continuity Narrative

Draft a 3-sentence Department Story that survives any leadership transition:

1

Sentence 1: What we do — your core operations and function.

2

Sentence 2: What it produces — the impact on students or the institution.

3

Sentence 3: What makes us irreplaceable — your unique value, knowledge, or relationships.

PRIZE ROUND 2

Know Your Knowledge



Pens down. Ears up.

Q2

Which component of the Department Intelligence Brief answers the question: "What would TSU lose if this department ceased to exist?"

A

The Evidence Portfolio

C

The Mission Anchor

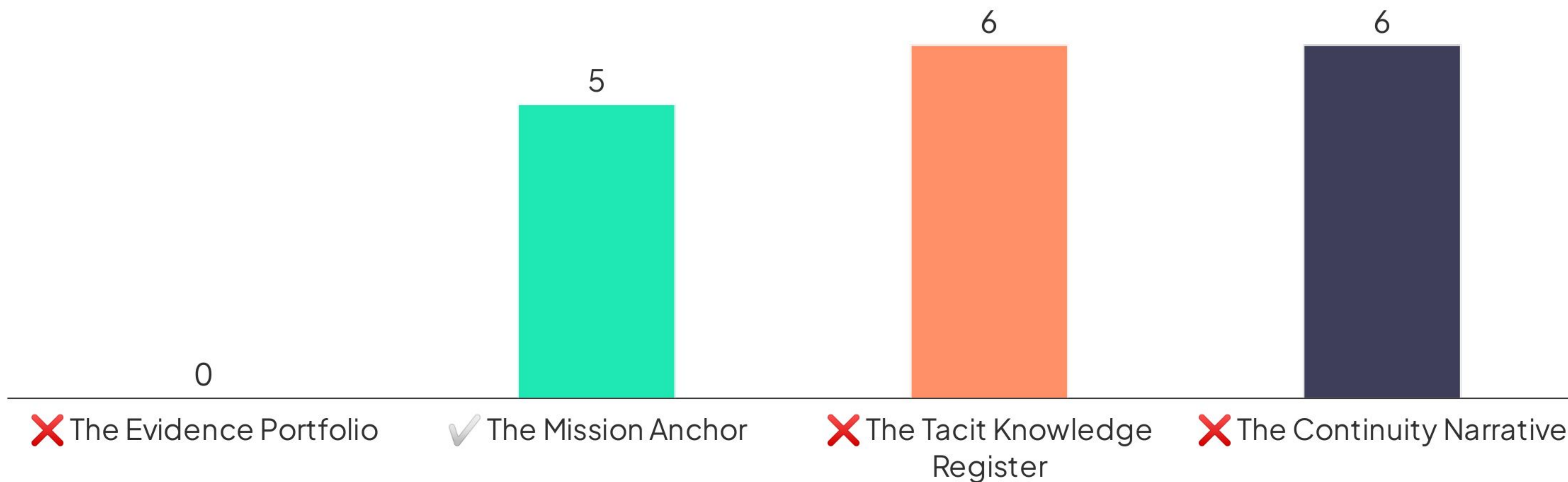
B

The Tacit Knowledge Register

D

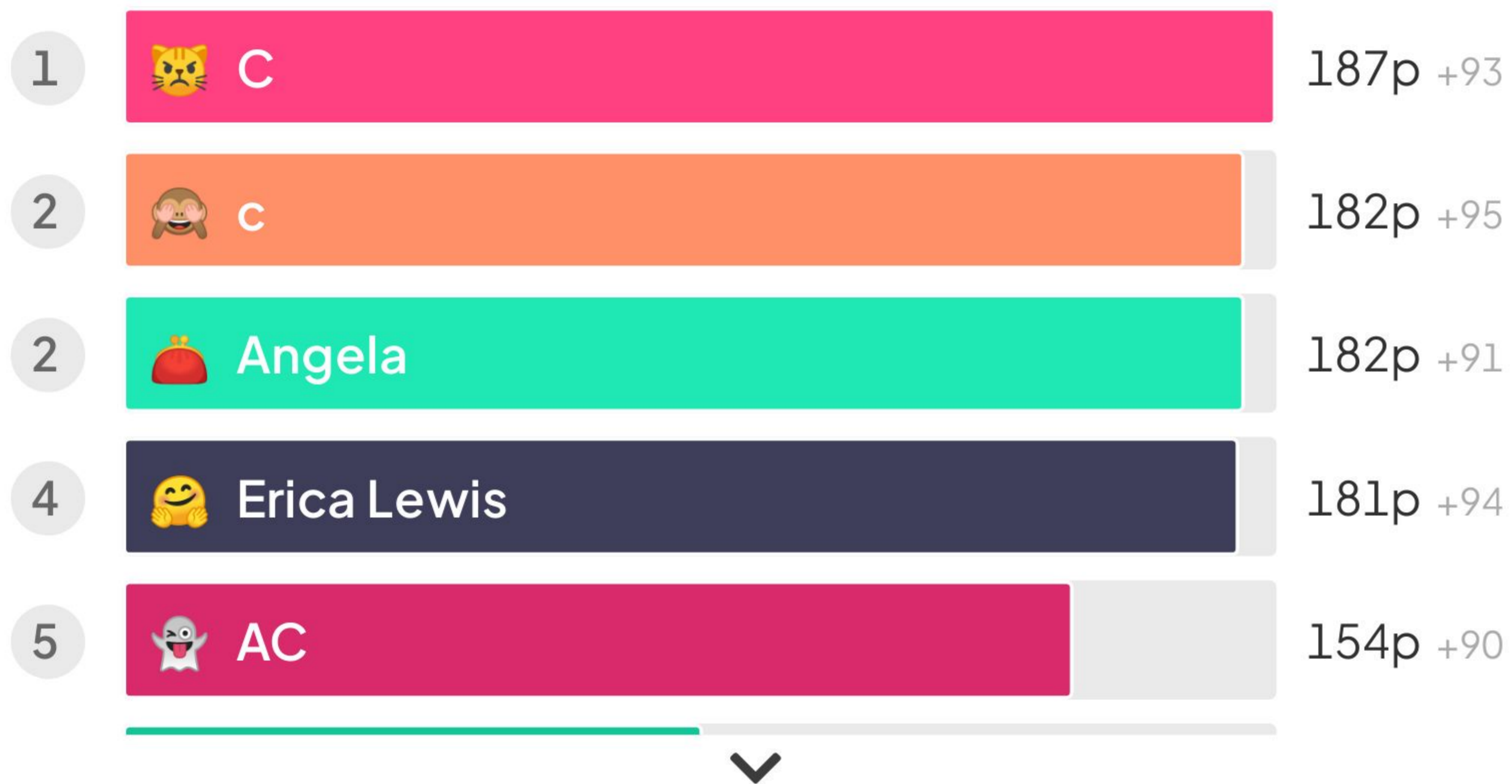
The Continuity Narrative

Which component of the Department Intelligence Brief answers the question: "What would TSU lose if this department ceased to exist?"



Leaderboard

24 players



05

Low-Effort, High-Impact:

Assessment Routines That Stick

The Real Barrier: Cognitive Overload

"You are already doing your job. Adding an assessment layer that requires extra forms, extra meetings, and extra reporting feels punitive, not purposeful. That's a design failure — not a motivation failure."

Design Failure Looks Like:

- Assessment as a separate annual task
- Extra forms no one reviews
- Reporting without feedback loops

Good Design Looks Like:

- Micro-habits embedded in existing routines
- Data that drives decisions you're already making
- 5 minutes of intentional reflection, not hours of reporting

Five Micro-Assessment Habits

No extra meetings. No new platforms. Fit inside work you're already doing.

1



The 5-Min End-of-Term Debrief

Team answers 3 questions in writing: What worked? What didn't? What did we learn? No survey platform required.

2



The Process Shadow

Have a new staff member attempt a key process without guidance. Friction points reveal your documentation priorities.

3



The Decision Trigger

Define in advance what data would prompt a process change. Data collection now has purpose, not just a destination.

4



The Relationship Map

Document the stakeholder relationships your department depends on. A new leader without this map rebuilds from scratch.

5



The Quarterly Story Spine Check

Revisit your Continuity Narrative quarterly. 15-minute team review keeps your DIB current without a major annual lift.

INDIVIDUAL REFLECTION – Worksheet 3

2 MIN

Choose ONE. Realistically – not aspirationally.

The 5-Min End-of-Term Debrief

The Process Shadow

The Decision Trigger

The Relationship Map

The Quarterly Story Spine Check

Who is responsible for implementing this?

When does it happen? (specific trigger or date)

What will you have when it's done?

In the next 30 days, I will _____ so that my department has _____ and students benefit by _____.



The Three Coaching Questions

①

How will you know it's working?

What would you see, measure, or hear that tells you the habit is producing something useful?

②

What is the most likely thing that will get in the way?

Be specific — not 'time' in general, but 'the first week of registration' or 'my supervisor's priorities'.

③

What is your single first concrete step in the next 72 hours?

Not 'I will think about it' — a specific, observable action you will take before Friday.

PRIZE ROUND 3

Habit Hackathon



Pens down. Ears up.

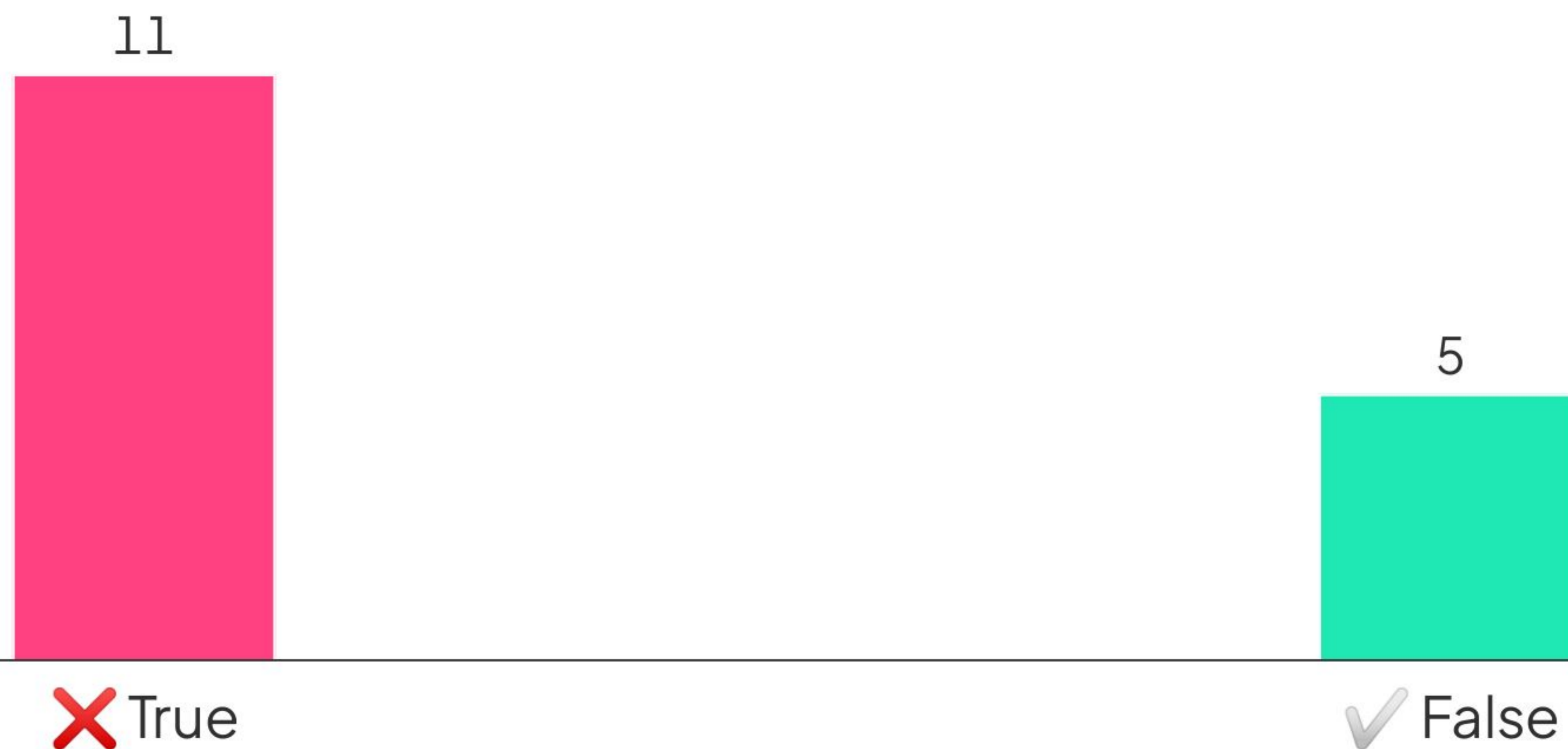
Q3

TRUE or FALSE:

The Decision Trigger works by reviewing your data AFTER you collect it and THEN deciding what action to take.

First correct response wins.

The Decision Trigger works by reviewing your data **AFTER** you collect it and **THEN** deciding what action to take.



Leaderboard

25 players



x3

🐱 C holds the longest streak record!



C

1	🐱 C	282p +95
2	🙈 c	279p +97
3	👑 Angela	277p +95
4	😄 Erica Lewis	181p +0
-	-	-

282 points



06

Commitment + Closing

One True Thing

06

The One True Thing Commitment

Write honestly. You're making this commitment to your department — not to this room.

1

One true thing I'm taking from this session:

2

One assessment action I will take in the next 30 days:

3

One colleague I will share this with:

Continuous improvement is not the goal.

Student success is the goal. Operational effectiveness is the goal. Being an institution that can respond, adapt, and serve — that's the goal.

Assessment is the mechanism — the intelligence system that tells you whether you're getting there, what's at risk, and what must be preserved.

When your department builds an assessment ecosystem — even a simple one — you stop being a collection of tasks and start being an institution of knowledge. Legible. Resilient. Durable.

TSU has invested in a culture of assessment. Today, you added the connective tissue — the tacit knowledge registers, the departmental narratives, and the intentional routines that turn reporting into intelligence.

That investment pays for itself every time the door revolves — and the work continues.

Your Next Steps

What you can do in the next 30 days with what you built today.



This Week

- Share your Continuity Narrative draft with your supervisor
- Identify the #1 tacit knowledge gap from your audit
- Exchange commitment cards with your accountability partner



This Month

- Complete all four components of your Department Intelligence Brief
- Implement your one selected micro-assessment habit
- Share the DIB template with your team at the next meeting



This Semester

- Run your first 5-Minute End-of-Term Debrief
- Review and update your DIB quarterly
- Nominate your department for TSU's Certificate of High Performer for Outcomes Assessment

TSU Assessment Resources:

tnstate.edu/assessment · Nuventive Improve · Certificate of High Performer for Outcomes Assessment · Office of Assessment

Questions & Discussion

Let's discuss your specific dilemmas and mitigation strategies.

Dr. Naima Wells

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Embry-Riddle Aeronautical
University

Questions & Discussion

Top questions

There are no unanswered questions.

Pinned

Newest

Oldest

Answered

Thank You!

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Executive Director of Operational Impact
and Success

