



# Office of Institutional Effectiveness



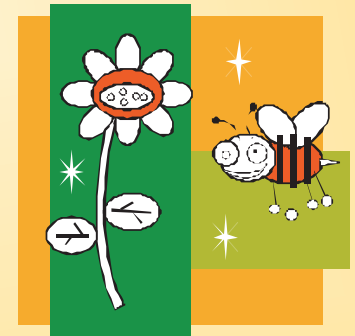
University  
of Houston  
Clear Lake

## OIE Annual Planning Calendar

Published May 2009

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Report prepared by:  
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# University of Houston-Clear Lake Office of Institutional Effectiveness Annual Planning Calendar

The items in this calendar are broken out by term, then by CBM State Reporting, IPEDS, LBB, Internal Reporting, Surveys, Other, Planning and Assessment, and Special Projects.

## Fall Schedule




Updated May 19, 2009



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Note: Every effort will be made to meet timelines outlined below; However, timelines are tentative and subject to change based on priorities.

	#	Description of Report	Report Title	Start Date	Due Date	Person(s) Responsible
	-	<b>CBM State Reporting:</b>				
	F1	Texas Success Initiative Report - for Summer term.	CBM002	1-Sep	1-Oct	Pablo / vacant in training
	F2	End of Semester Report - for Summer term.	CBM006	1-Sep	1-Oct	Miriam
	F3	Student Report.	CBM001	15-Sep	15-Oct	Miriam/Mary
	F4	Class Report.	CBM004	15-Sep	15-Oct	Miriam/Mary
	F5	Building and Room Report.	CBM005	1-Oct	1-Nov	Miriam
	F6	Faculty Report.	CBM008	15-Sep	15-Oct	Pablo
	F7	Graduation Report - annual.	CBM009	1-Sep	1-Oct	Miriam
	F8	Admissions Report - annual.	CBM00B	15-Sep	15-Oct	Pablo
	F9	45 Hour Rule Report - using CBM-001.	45 Hour Rule Report / Keep UHCL constituents apprised of rules and changes - post and maintain an updated set of guidelines on OIE Internal Resources website	30-Oct	15-Nov	Miriam
	F10	30 Hour Rule Report - using CBM-001.	30 Hour Rule Report / Keep UHCL constituents apprised of rules and changes - post and maintain an updated set of guidelines on OIE Internal Resources website	30-Oct	15-Nov	Miriam
	F11	Off-campus report for DE using CBM-004.	Off-campus report	30-Oct	15-Nov	Miriam
	F12	THECB Accountability report - includes faculty data - THECB provides data.	THECB Accountability report	1-Nov	21-Dec	Pablo (requires work with Deans to gather information)



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	#	Description of Report	Report Title	Start Date	Due Date	Person(s) Responsible
	F13	Close the Gaps Projections - various indicators that require enrollment projections.	Close the Gaps Projections	1-Nov	21-Dec	Peggy enter data into system / Simone runs projections
	F14	THECB Affordability Survey - This table provides information on the percentage of the median family income that would be required to pay for tuition and fees for the "average" family from a specific region by ethnicity. It does not provide information on how affordable the institution is for students currently enrolled.	THECB Affordability Survey	Fall - upon THECB request	Fall - upon THECB request	Pablo
	F15	CBM Testing on PeopleSoft screens.	CBM Testing Processes	on-going	on-going	Miriam / Pablo / Mary
	F16	Update the OIE public drive with THECB edit reports and certified data files.	Update OIE public drive	on-going	on-going	Miriam / Pablo / Mary
	F17	Maintenance and update of THECB certified data warehouse - import CBM data files into SPSS format and update syntax as needed.	THECB Data Warehouse	on-going	on-going	Peggy
	F18	Continue to update the CBM data submission manual as needed with PS changes and CB changes.	Update CBM data submission manual	on-going	on-going	Miriam / Pablo / Mary
	F19	Continue to work with and train Admissions and Records staff regarding CBM reporting and processes and running their own audits/clean-up.	Work with and train Admissions and Records staff	on-going	on-going	Miriam / Pablo / Mary
	F20	Create/update PeopleSoft queries used for reporting and merge them to CB flat files when necessary to create and update PeopleSoft data warehouse	PeopleSoft Data Warehouse	on-going	on-going	Peggy
	F21	Work with UH programmers and UHCL constituents regarding race/ethnicity changes and keep OIE team members abreast for reporting changes	New Race/Ethnicity Changes	on-going	on-going	Miriam
	F22	Work with UH programmers and UHCL constituents regarding new Pearland campus coding and keep OIE team members abreast for reporting changes	Pearland Campus Coding	on-going	on-going	Miriam



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**Note: Every effort will be made to meet timelines outlined below; However, timelines are tentative and subject to change based on priorities.**

	#	Description of Report	Report Title	Start Date	Due Date	Person(s) Responsible
	-	<b>IPEDS Federal Reporting:</b>				
	F23	The Fall collection includes the Institutional Characteristics and Completions components (CBM-009) for previous academic year.	IPEDS Fall Collection	6-Sep	18-Oct	Peggy
	F24	The Winter collection includes the combined Human Resources component (Employees by Assigned Position, Salaries and Fall Staff). In addition, institutions have the opportunity to provide Enrollment data (fall and full year) and Finance data at this time.	IPEDS Winter Collection	6-Dec	24-Jan	Peggy / Pablo / HR / John Cordary (note that OIE prefers to complete enrollment data early - Finance prefers to wait until Spring collection)
	-	<b>LBB (Legislative Budget Board) &amp; LAR (Legislative Appropriations Request)</b>				
	F25	LBB worksheet for key indicators including retention data by ethnicity.	Legislative Budget Board worksheet	1-Oct	1-Nov	Peggy
	-	<b>Fall Internal Term Reporting</b>				
	F26	OIE Fact Book - begin communicating to campus departments regarding information required for Fact Book.	Fact Book information gathering	1-Nov	22-Dec	Pablo/ Mary gather external data/ Simone and Peggy Review
	F27	Facts at a Glance - detailed student enrollment demographics.	Facts at a Glance	1-Nov	2-Dec	Mary / Peggy will review
	F28	Facts at a Glance - detailed student enrollment demographics for TDCJ (Fall only)	Facts at a Glance - Texas Dept of Criminal Justice Student Profile	1-Nov	2-Dec	Mary / Peggy will review
	F29	Term Enrollment Comparison of Headcount and SCH.	Enrollment Comparison of Headcount and SCH	15-Oct	1-Nov	Peggy
	F30	New Student Transfer Report - First Time Transfers from Gulf Coast Community Colleges (Fall only).	New Student Transfer Report	1-Dec	15-Dec	Peggy
	F31	Base Year Comparison Report - done for funding years only.	Base Year Comparison Report	1-Dec	15-Dec	Peggy
	F32	Program Profile Reports - (replaces Enrollment Profiles) This report summarizes student demographic trend data for specific programs aggregated by CIP code for Fall terms. Used for Program Review.	Program Profile Report (due to the detail of this report due dates are tentative and my defer to early spring)	1-Dec	22-Dec	Pablo



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	#	Description of Report	Report Title	Start Date	Due Date	Person(s) Responsible
	F33	Enrollment and Semester Credit Hours by School, Classification and Rubric - These data were derived using the certified CBM-004.	Enrollment and Semester Credit Hours by School, Classification and Rubric	15-Dec	22-Dec	Peggy
	F34	Community College GPA Report - This report provides average GPA data for UHCL undergraduate students, for students who transferred from the Gulf Coast Community Colleges. Data is divided out for each community college by major plan. In order to protect the privacy of individuals, average GPAs are not reported for categories with fewer than 5 students.	Community College GPA Report (for previous Summer term) - this report always done for the term preceding the current term since data are not available until the end of each term.	1-Sep	15-Sep	Mary
	F35	End of Term GPA & Completions by Rubric Report - This report includes grade distribution per course section, average GPA by course section, % completion, and % A-C students completion.	End of Term GPA & Completions by Rubric Report - (for previous Summer term) - this report always done for the term preceding the current term since data are not available until the end of each term.	1-Sep	30-Sep	Pablo
	F36	SCH for Piper Award Nominees - total SCH generated during prior FY for each faculty member nominated for Piper Awards - requested by Nina Perez: August - September.	SCH for Piper Award Nominees	1-Sep	15-Sep	Miriam
	F37	Faculty 65/35 SCH Report - Fall and Spring only - for Glen Houston after CBM-008 and CBM-004 are certified generally towards the end of each long term.	Faculty 65/35 SCH Report	1-Dec	22-Dec	Pablo
	F38	Information requested by Jean Carr for Budget Projections - also include CBM-004 edit report with SCH by fund code - Cindy Lamb runs PS query to assist with this report.	Information requested by Jean Carr for Budget Projections	20-Oct	1-Nov	Peggy
	F39	ABET - departmental accreditation activity reports - generally run by CIP code using the CBM-001.	ABET requests	on-going	on-going	Pablo
	F40	International Student by Residence Report	International Student by Residence	1-Nov	10-Nov	Peggy



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	#	Description of Report	Report Title	Start Date	Due Date	Person(s) Responsible
	F41	SCH and FTE Trends <b>Annual Report Only for Fall terms.</b>	Trends for student SCH and FTE	1-Nov	10-Nov	Pablo
	F42	Gender by Ethnicity <b>Annual Report Only for Fall terms.</b>	Gender by Ethnicity Trends	1-Nov	10-Nov	Peggy
	F43	Chancellor Khator UHCL Progress Report Card	Information requested by UH Main - update with the IPEDS data feedback report for select variables	1-Oct	1-Oct	Peggy / Simone
	-	<b>Surveys - Creation and Analysis</b>				
	F44	Graduating Student Survey - data collected on student perceptions of University at time of graduation - for Fall and Spring terms only.	Graduating Student Survey	Start one month prior to graduation, i.e. Nov. 15	Analysis completed around Jan 15	Mary
	F45	ASSA - Academic Support Services Assessment - completed every 2 years for THECB.	ASSA Survey	10/1/2009 (dates subject to change)	Analysis completed April 1	Mary
	F46	MAPP - Measure of Academic Proficiency and Progress - for Fall and Spring terms only and reporting	MAPP Test	20-Aug	15-Oct	Mary
	F47	New Student Needs Evaluation Survey for Student Services - at the beginning of each Fall and Spring term only if requested.	Student Needs Survey	20-Aug	1-Oct	Mary
	F48	Orientation Survey - for Student Services - at the beginning of each Fall and Spring term only.	Orientation Survey	10-Aug	1-Oct	Mary
	F49	University Forest Residents Survey - done once a year in the Fall if requested.	University Forest Residents Survey	1-Oct	1-Dec	Mary
	F50	Classroom and Lab Usage Survey - done every Fall and Spring term only - for Glen Houston.	Classroom and Lab Usage Survey	1-Oct	15-Dec	Miriam
	F51	External survey requests will be reviewed by Director and Associate Director - due to a heavy survey workload for Fall and Spring terms - many external surveys (i.e., Peterson's, College Board, etc.) will be evaluated on a case by case basis. Most external surveys now go to Yvette Bendeck office	External Survey Requests	on-going	on-going	Miriam



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	#	Description of Report	Report Title	Start Date	Due Date	Person(s) Responsible
	F52	National Science Foundation Survey	This survey is comprehensive and involves a large amount of data gathering and data entry and working with financial aid and building a syntax	10-Oct	10-Dec	Peggy / Pablo assist in 2010 since a work study is not available
	-	<b>Other Activities</b>				
	F53	OIE cross-training activities - to ensure staff are cross-trained on various software and process and procedures.	Cross-Training	on-going	on-going	Entire OIE Team
	F54	Ad-Hoc requests will be evaluated before agreed to and priority assigned as needed.	Ad-Hoc requests	on-going	on-going	Entire OIE Team
	F55	Business Account Reconciliation - done every month.	Reconciliation	2nd week of every month	3rd week of every month	Roxanne Hoffman
	F56	Purchasing and Office Administration.	Purchasing and Office Administration	on-going	on-going	Mary
	F57	Update of OIE website - continually add new reports/ continue to modify for customer ease of navigation.	OIE Website	on-going	on-going	Simone / Pablo / Peggy
	F58	University of Houston System data requests - includes enrollment data, graduation data, SCH, FTE requests and Pappas consultant requests.	University of Houston System data requests	on-going	on-going	Miriam
	F59	Peer Review activities	Peer Review activities	on-going	on-going	Entire OIE Team
	F60	Bond Data requested by Michelle Dotter every fall term	Bond Data spreadsheet	1-Nov	15-Nov	Pablo
	-	<b>Planning and Assessment</b>				
	F61	Planning and Assessment cross-training activities - to ensure staff are cross-trained on basics and software operation by Director.	Cross-Training	on-going	on-going	Entire OIE Team



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	#	Description of Report	Report Title	Start Date	Due Date	Person(s) Responsible
	F62	Close the Loop. All program areas complete the last two columns ("Assessment Results" and "Use of Results") of the Fiscal Year plans in AIM. This includes both learning outcomes and program outcomes assessment plans. Please attach supporting documents or record the location of supporting documents in the AIM system when applicable.	Close the Loop	on-going	1-Oct	Simone
	F63	Modify Fiscal Year Plans. Based on assessment findings and other changes, program areas modify Fiscal Year Plans as necessary. The plan should include both learning outcomes and program outcomes.	Modify FY07 Plans	on-going	1-Oct	Simone
	F64	Review Assessment Plans. OIE review all assessment plans for timely completion and issue a review report to Deans, Provost, and the President indicating the extent to which each plan meets the review criteria.	Review Assessment Plans	on-going	1-Nov	Simone
	F65	SACS - Southern Association of Colleges and Schools - various activities associated with accreditation.	SACS Activities	on-going	15-Jun	Simone / Peggy / Mrinal
	F66	Assessment of core competencies-administer information technology, ethical reasoning, and global knowledge assessments to a sample of seniors; share results with the schools	Assessment of core competencies	1-Sep	1-Dec	Simone
	F67	Assessment of core competencies – work with schools and faculty to develop assessment activities to assess core competencies (e.g., writing, critical thinking)	Assessment of core competencies	on-going	on-going	Simone
	-	<b>Special Projects or Special Requests that are not routine</b>				
	F68	4-Year Follow-up Report for Pappas Consulting Group	4-year write-up for Pappas consulting	on-going		Simone / Peggy



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	#	Description of Report	Report Title	Start Date	Due Date	Person(s) Responsible
	F69	On behalf of Provost Stockton: Carnegie Elective Classification for Community Engagement meeting	Carnegie Elective Classification for Community Engagement	on-going	1-Aug	Peggy
	F70	Voluntary System of Accounting	VSA	on-going	on-going	Simone / Pablo
	F71	Chancellor Khator special data requests	Khator requests	on-going	on-going	Peggy / Pablo in Peggy's absence
	F72	AIM Assessment Project - organizing syllabi by discipline by course number for Director review. save assessment plans from Director on the shared drive.	AIM Assessment Project	on-going	on-going	Simone / Mary
	F73	Routinely asked to provide student distribution lists for external surveys that sometimes take considerable amounts of time	Routine Student Distribution Lists	on-going	on-going	Miriam / Miriam also train Mary as back-up
	F74	Represent UHCL in THECB meetings	Represent UHCL in THECB meetings	on-going	on-going	Simone / Mrinal
	F75	Pappas Consulting Group Enrollment Data	Comprehensive Student Enrollment Data	on-going	on-going	Miriam
	F76	Pearland Campus reporting for Glen Houston	Comprehensive Pearland Demographic data and students by Pearland area Zips Report	on-going	on-going	Peggy
	F77	Leadership Conference Survey and Analysis	Leadership Conference Survey for Student Life Office	Fall	Fall	Mary

# University of Houston-Clear Lake Office of Institutional Effectiveness Annual Planning Calendar

The items in this calendar are broken out by term, then by CBM State Reporting, IPEDS, LBB, Internal Reporting, Surveys, Other, Planning and Assessment, and Special Projects.

## Spring Schedule




Updated May 19, 2009



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Note: Every effort will be made to meet timelines outlined below; However, timelines are tentative and subject to change based on priorities.

	#	Description of Report	Report Title	Start Date	Due Date	Person(s) Responsible
	-	<b>CBM State Reporting:</b>				
	P1	Texas Success Initiative Report - for Fall term.	CBM002	2-Jan	1-Feb	Pablo / vacant in training
	P2	End of Semester Report - for Fall term.	CBM006	2-Jan	1-Feb	Miriam / Mary
	P3	Student Report.	CBM001	15-Feb	15-Mar	Miriam / Mary
	P4	Class Report.	CBM004	15-Feb	15-Mar	Miriam / Mary
	P5	Faculty Report.	CBM008	15-Feb	15-Mar	Pablo
	P6	45 Hour Rule Report - using CBM-001.	45 Hour Rule Report / Keep UHCL constituents apprised of rules and changes - post and maintain an updated set of guidelines on OIE Internal Resources website	30-Mar	15-Apr	Miriam / Pablo / Mary
	P7	30 Hour Rule Report - using CBM-001.	30 Hour Rule Report / Keep UHCL constituents apprised of rules and changes - post and maintain an updated set of guidelines on OIE Internal Resources website	30-Oct	15-Nov	Miriam
	P8	Off-campus report for DE using CBM-004.	Off-campus report	30-Mar	15-Apr	Miriam
	P9	CBM Testing on PeopleSoft screens.	CBM Testing Processes	on-going	on-going	Miriam / Pablo / Mary
	P10	Update the OIE public drive with THECB edit reports and certified data files.	Update OIE public drive	on-going	on-going	Miriam / Pablo / Mary
	P11	Maintenance and update of THECB certified data warehouse - import CBM data files into SPSS format and update syntax as needed.	THECB Data Warehouse	on-going	on-going	Peggy



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**Note: Every effort will be made to meet timelines outlined below; However, timelines are tentative and subject to change based on priorities.**

	#	Description of Report	Report Title	Start Date	Due Date	Person(s) Responsible
	P12	Continue to work with and train Admissions and Records staff regarding CBM reporting and processes and running their own audits/clean-up.	Work with and train Admissions and Records staff	on-going	on-going	Miriam / Pablo / Mary
	P13	Create/update PeopleSoft queries used for reporting and merge them to CB flat files when necessary to create and update PeopleSoft data warehouse	PeopleSoft Data Warehouse	on-going	on-going	Peggy
	P14	Work with UH programmers and UHCL constituents regarding race/ethnicity changes and keep OIE team members abreast for reporting changes	New Race/Ethnicity Changes	on-going	on-going	Miriam
	P15	Work with UH programmers and UHCL constituents regarding new Pearland campus coding and keep OIE team members abreast for reporting changes	Pearland Campus Coding	on-going	on-going	Miriam
	-	<b>IPEDS Federal Reporting:</b>				
	P16	THECB Cost Study Report - information generally provided by the THECB but must be gathered by various methods.	THECB Cost Study Report - for Accounting dept.	1-Dec	19-Jan	Pablo
	P17	The Winter collection includes the combined Human Resources component (Employees by Assigned Position, Salaries and Fall Staff). In addition, institutions have the opportunity to provide Enrollment data (fall and full year) and Finance data at this time.	IPEDS Winter Collection - This survey is duplicated from the Fall Schedule in case more time is needed to complete it - every effort is made to complete this survey before the holiday break in Dec.	6-Dec	24-Jan	Peggy / Pablo / HR / John Cordary (note that OIE prefers to complete enrollment data early - Finance prefers to wait until Spring collection)
	P18	The Spring collection includes Enrollment and Finance (for those institutions that did not lock in the winter), Student Financial Aid, and Graduation Rates. Some data does not pertain to UHCL as a 2 year institution such as the graduation rates at this time, which only pertain to first time in college cohorts.	IPEDS Spring Collection	7-Mar	18-Apr	Peggy / Pablo Lynda McKendree - for Financial Aid data John Cordary for Finance data



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**Note: Every effort will be made to meet timelines outlined below; However, timelines are tentative and subject to change based on priorities.**

	#	Description of Report	Report Title	Start Date	Due Date	Person(s) Responsible
	-	<b>LBB (Legislative Budget Board) &amp; LAR (Legislative Appropriations Request)</b>				
	P19	LBB worksheet for key indicators for Fall data updates including space utilization and completion rates.	Legislative Budget Board worksheet	1-Mar	1-Apr	Peggy / Miriam sends Peggy the CBM-005 data
	-	<b>Spring Internal Term Reporting</b>				
	P20	Randomly select 10% of courses from each school so that Simone can audit their syllabi. Create list of cross listed courses. Display counts of courses by PT or FT faculty.	Syllabi Audit	Jan	Feb	Pablo
	P21	Fact Book - begin very early in the Spring term - gather data from other offices (hopefully in the Fall term) - review what data OIE needs to complete for Fall terms. <b>Top Priority for Spring.</b>	Fact Book	10-Jan	1-Jun	Entire OIE Team / Mary coordinate data from other offices, Pablo in charge of entire Fact Book process and formatting procedures
	P22	Graduation Trends Report - This report consists of a 5 year graduation study based on the total degrees awarded for a Fiscal Year. The information present actual UHCL CBM-009 certified graduate data extracted from a PeopleSoft query for inclusion of each student's most current Academic Plan record to obtain school information and mean number of terms to receive degree. Previous Fiscal Year of CBM-009 submitted in the Fall represents the last year of data. <b>Annual Report Only for Fiscal Year.</b>	Graduation Trends Report	15-Jan	15-Feb	Miriam



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	#	Description of Report	Report Title	Start Date	Due Date	Person(s) Responsible
	P23	Distribution of Course Sections by Class Size and Average Organized Class Size by School and Student Classification - Any class categorized as Lecture, Laboratory or Seminar with some Practicum exceptions for HSH and SOE. This methodology selects only classes that are Lecture, Laboratory and Seminar using item6 of the certified CBM-004 and selects all HSH Practicum courses and only SOE Practicum courses with an enrollment greater than 5. <b>Annual Report Only for Fall terms.</b>	Distribution of Course Sections by Class Size and Average Organized Class Size by School and Student Classification	15-Jan	1-Mar	Peggy
	P24	Faculty Profile by Area of Instruction - The certified CBM008 (Faculty Report) contains all persons at the institution having faculty classification regardless of whether they taught or not. The certified CBM004 (Class Report) contains all classes taught for the reported term and contain the faculty of record for each class. When the CBM004 is merged to the CBM008 it results in a list of faculty who actually taught and were the faculty of record for at least one class. <b>Annual Report Only for Fall terms.</b>	Faculty Profile by Area of Instruction	1-Feb	1-Mar	Miriam
	P25	Faculty Salaries Report - Salary Computations on based on the formula outlined in the THECB CBM Reporting Manual in the CBM008 Faculty Report section. <b>Annual Report Only for Fall terms.</b>	Faculty Salaries Report	1-Feb	1-Mar	Miriam
	P26	Faculty FTE Report - Based on the THECB formula for computing Faculty FTE where Full Time + (Part Time / 3) = Faculty FTE. <b>Annual Report Only for Fall terms.</b>	Faculty FTE Report	1-Feb	1-Mar	Miriam



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	#	Description of Report	Report Title	Start Date	Due Date	Person(s) Responsible
	P27	Student Enrollment by Location and Rubric - Certified CBM-004 for - using item8, item8a, and item10 to determine the location taught and instruction mode. Note that enrollments are extracted from the course report and will be duplicative. Annual Report Only for Fall terms - Created for Fact Book and to replace Special Initiatives Report. Updated report should break data out by school and career (graduate and undergraduate). <b>Annual Report Only for Fall terms.</b>	Student Enrollment by Location and Rubric - Report to review all off-site and Distance Education Courses and Enrollments	15-Jan	1-Feb	Pablo
	P28	Certification Student Report - a report detailing certification students at UHCL for Fall terms. Used for Fact Book. Work with Deans to identify programs. <b>Annual Report Only for Fall terms.</b>	Certification Student Report	15-Jan	15-Feb	Pablo
	P29	Alumni Distribution of U.S. Residents as of most current Fiscal Year - Dot Density View. Detailed map with table depicting all former graduates of UHCL. <b>Annual Report Only - used in Fact Book.</b>	Alumni Distribution of U.S. Residents as of most current Fiscal Year - Dot Density View	15-Mar	15-Apr	Peggy
	P30	UHCL Enrollment by Zip Code and Student Distribution Map Display - Detailed map for most current Fiscal Year - Dot Density View. Displays the spatial location of students attending UHCL unduplicated for a Fiscal Year. Includes a detailed enrollment by zip code table. <b>Annual Report Only - used in Fact Book.</b>	UHCL Enrollment by Zip Code and Student Distribution Map Display	15-Apr	15-May	Peggy
	P31	Facts at a Glance - detailed student enrollment demographics.	Facts at a Glance	1-Apr	1-May	Mary
	P32	Term Enrollment Comparison of Headcount and SCH.	Enrollment Comparison of Headcount and SCH	1-Apr	15-Apr	Peggy
	P33	Base Year Comparison Report - done for funding years only.	Base Year Comparison Report	1-Apr	1-May	Peggy



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	P39	Information requested by Jean Carr for Budget Projections - also include CBM-004 edit report with SCH by fund code - Cindy Lamb runs PS query to assist with this report.	Information requested by Jean Carr for Budget Projections	1-Apr	15-Apr	Peggy



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	P40	ABET - departmental accreditation activity reports - generally run by CIP code using the CBM-001.	ABET requests	on-going	on-going	Pablo
	P41	International Student by Residence Report	International Student by Residence	1-Nov	10-Nov	Peggy
	P42	Chancellor Khator UHCL Progress Report Card	Information requested by UH Main	15-Apr	15-Apr	Peggy / Simone
	P43	OPEN DOORS Survey	External Survey Requests	15-Mar	15-Mar	Pablo
	-	<b>Surveys - Creation and Analysis</b>				
	P44	Deans Survey - Annual survey only - for Provost to use as an instrument in evaluating Deans.	Deans Survey			Miriam / Mary
	P45	Central Stores Survey - Spring term Only.	Central Stores Survey Report	upon request	upon request	Miriam / Mary
	P46	Alumni Survey - only done for odd years and only done once every 2 years for former student perceptions 3 years out.	Alumni Survey	15-Mar	30-May	Mary
	P47	New Student Needs Evaluation Survey for Student Services - at the beginning of each Fall and Spring term only.	Student Needs Survey	20-Aug	1-Oct	Mary
	P48	Orientation Survey - for Student Services - at the beginning of each Fall and Spring term only.	Orientation Survey	10-Aug	1-Oct	Mary
	P49	Graduating Student Survey - data collected on student perceptions of University at time of graduation - for Fall and Spring terms only.	Graduating Student Survey	Start one month prior to graduation, i.e. Apr 1	Analysis completed around Jun 15	Mary
	P50	MAPP - Measure of Academic Proficiency and Progress - for Fall and Spring terms only.	MAPP Test	15-Jan	15-Mar	Mary
	P51	Classroom and Lab Usage Survey - done every Fall and Spring term only - for Glen Houston.	Classroom and Lab Usage Survey	1-Feb	1-Apr	Miriam



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**Note: Every effort will be made to meet timelines outlined below; However, timelines are tentative and subject to change based on priorities.**

	#	Description of Report	Report Title	Start Date	Due Date	Person(s) Responsible
	P52	External survey requests will be reviewed by Director and Associate Director - due to a heavy survey workload for Fall and Spring terms - many external surveys (i.e., Peterson's, College Board, etc.) will be evaluated on a case by case basis. Most external surveys now go to Yvette Bendeck office	External Survey Requests	on-going	on-going	Miriam
	P53	NSSE - National Survey of Student Engagement	NSSE - annual student survey	1-Jan	15-Feb	Miriam run all survey lists - Mary assist / Simone oversee
<b>Other Activities</b>						
	P54	OIE cross-training activities - to ensure staff are cross-trained on various software and process and procedures.	Cross-Training	on-going	on-going	Entire OIE Team
	P55	Ad-Hoc requests will be evaluated before agreed to and priority assigned as needed.	Ad-Hoc requests	on-going	on-going	Entire OIE Team
	P56	Business Account Reconciliation - done every month.	Reconciliation	2nd week of every month	3rd week of every month	Roxanne Hoffman
	P57	Purchasing and Office Administration.	Purchasing and Office Administration	on-going	on-going	Mary
	P58	Update of OIE website - continually add new reports/ continue to modify for customer ease of navigation.	OIE Website	on-going	on-going	Simone / Pablo / Peggy
	P59	University of Houston System data requests - includes enrollment data, graduation data, SCH, FTE requests and Pappas consultant requests.	University of Houston System data requests	on-going	on-going	Miriam
	P60	Peer Review activities	Peer Review activities	on-going	on-going	Entire OIE Team
	-	<b>Planning and Assessment</b>				
	P61	Planning and Assessment cross-training activities - to ensure staff are cross-trained on basics and software operation by Director.	Cross-Training	on-going	on-going	Entire OIE Team
	P62	Develop Assessment Plans. All program areas complete the first four columns of the FY08 plan template in AIM. This includes both learning outcomes and program outcomes assessments.	Develop Assessment Plans	on-going	15-May	Simone



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**Note: Every effort will be made to meet timelines outlined below; However, timelines are tentative and subject to change based on priorities.**

	#	Description of Report	Report Title	Start Date	Due Date	Person(s) Responsible
	P63	SACS - Southern Association of Colleges and Schools - various activities associated with accreditation.	SACS Activities	on-going	15-Jun	Simone / Peggy / Mrinal
	P64	Assessment of core competencies – work with schools and faculty to develop assessment activities to assess core competencies (e.g., writing, critical thinking)	Assessment of core competencies	on-going	on-going	Simone
	-	<b>Special Projects or Special Requests that are not routine</b>				
	P65	4-Year Follow-up Report for Pappas Consulting Group	4-year write-up for Pappas consulting	on-going	on-going	Simone / Peggy
	P66	On behalf of Provost Stockton: Carnegie Elective Classification for Community Engagement meeting	Carnegie Elective Classification for Community Engagement	on-going	1-Aug	Peggy
	P67	Voluntary System of Accounting	VSA	on-going	on-going	Simone / Pablo
	P68	Chancellor Khator special data requests	Khator requests	on-going	on-going	Peggy / Pablo in Peggy's absence
	P69	Adult Priorities Noel Levitz-if requested	Adult Priorities Noel Levitz	Spring	Spring	Mary / Miriam provide list of respondents
	P70	Routinely asked to provide student distribution lists for external surveys that sometimes take considerable amounts of time	Routine Student Distribution Lists	on-going	on-going	Miriam / Miriam also train Mary as back-up
	P71	Represent UHCL in THECB meetings	Represent UHCL in THECB meetings	on-going	on-going	Simone / Mrinal
	P72	Pappas Consulting Group Enrollment Data	Comprehensive Student Enrollment Data	on-going	on-going	Miriam
	P73	Pearland Campus reporting for Glen Houston	Comprehensive Pearland Demographic data and students by Pearland area Zips Report	on-going	on-going	Peggy
	P74	PDAS Survey and Analysis	Professional Development and Appraisal System (PDAS) Survey for Dr. Schumacher/Dr. Grigsby	Spring	Spring	Mary



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**Note: Every effort will be made to meet timelines outlined below; However, timelines are tentative and subject to change based on priorities.**

	#	Description of Report	Report Title	Start Date	Due Date	Person(s) Responsible
	P75	Continuous Improvement Survey and Analysis	Key Factors in the Implementation and Sustainability of Quality Improvement Efforts in School Districts That Utilize the Baldrige National Quality Program's Educational Criteria for Performance Excellence for Dr. Schumacher/Dr. Grigsby	Spring	Spring	Mary
	P76	Research Study - SOE Principal Prep Programs and data retrieval	University of Houston-Clear Lake Research Study on How Principal Preparation Programs Prepare Graduate Students to Interpret State Mandated Tests for Improved Student Achievement for Dr. Grigsby/Dr. Burt	Spring	Spring	Mary
	P77	Community Outreach Day Survey - Fall and Spring terms only	Community Outreach Day Survey for Student Life Office	Spring	Spring	Mary
	P78	Communications Survey for "The Signal"	Send out ~7,300 invitations to students for "The Signal" survey	Spring	Spring	Mary
	P79	Faculty Workload Report using Texas A&M format and using most current Fall term data	Faculty Workload Report using latest Fall term	Spring	Spring	Peggy

# University of Houston-Clear Lake Office of Institutional Effectiveness Annual Planning Calendar

The items in this calendar are broken out by term, then by CBM State Reporting, IPEDS, LBB, Internal Reporting, Surveys, Other, Planning and Assessment, and Special Projects.

## Summer Schedule




Updated May 19, 2009



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Note: Every effort will be made to meet timelines outlined below; However, timelines are tentative and subject to change based on priorities.

	#	Description of Report	Report Title	Start Date	Due Date	Person(s) Responsible
	-	<b>CBM State Reporting:</b>				
	S1	Texas Success Initiative Report - for Spring term	CBM002	15-May	15-Jun	Pablo / vacant in training
	S2	End of Semester Report - for Spring term	CBM006	15-May	15-Jun	Miriam / Mary
	S3	Student Report.	CBM001	15-Jul	15-Aug	Miriam / Mary
	S4	Class Report.	CBM004	15-Jul	15-Aug	Miriam / Mary
	S5	Faculty Report.	CBM008	15-Jul	15-Aug	Pablo
	S6	45 Hour Rule Report - using CBM-001.	45 Hour Rule Report / Keep UHCL constituents apprised of rules and changes - post and maintain an updated set of guidelines on OIE Internal Resources website	30-Aug	15-Sep	Miriam / Pablo / Mary
	S7	30 Hour Rule Report - using CBM-001.	30 Hour Rule Report / Keep UHCL constituents apprised of rules and changes - post and maintain an updated set of guidelines on OIE Internal Resources website	30-Oct	15-Nov	Miriam
	S8	Off-campus report for DE using CBM-004.	Off-campus report	30-Aug	15-Sep	Miriam
	S9	CBM Testing on PeopleSoft screens.	CBM Testing Processes	on-going	on-going	Miriam / Pablo / Mary
	S10	Update the OIE public drive with THECB edit reports and certified data files.	Update OIE public drive	on-going	on-going	Miriam / Pablo / Mary
	S11	Maintenance and update of THECB certified data warehouse - import CBM data files into SPSS format and update syntax as needed.	THECB Data Warehouse	on-going	on-going	Peggy



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**Note: Every effort will be made to meet timelines outlined below; However, timelines are tentative and subject to change based on priorities.**

	#	Description of Report	Report Title	Start Date	Due Date	Person(s) Responsible
	S12	Continue to work with and train Admissions and Records staff regarding CBM reporting and processes and running their own audits/clean-up.	Work with and train Admissions and Records staff	on-going	on-going	Miriam / Pablo / Mary
	S13	Create/update PeopleSoft queries used for reporting and merge them to CB flat files when necessary to create and update PeopleSoft data warehouse	PeopleSoft Data Warehouse	on-going	on-going	Peggy
	S14	Work with UH programmers and UHCL constituents regarding race/ethnicity changes and keep OIE team members abreast for reporting changes	New Race/Ethnicity Changes	on-going	on-going	Miriam
	S15	Work with UH programmers and UHCL constituents regarding new Pearland campus coding and keep OIE team members abreast for reporting changes	Pearland Campus Coding	on-going	on-going	Miriam
	-	<b>IPEDS Federal Reporting:</b>				
	S16	All institutions will be required to register for the new Fiscal Year data collection cycle.	IPEDS Fall Collection	2-Aug	30-Aug	Peggy
	-	<b>LBB (Legislative Budget Board) &amp; LAR (Legislative Appropriations Request)</b>				
	S17	LAR - projections on several key indicators: Had to identify where to obtain data - worked with Jean Carr and Simone - had to create a database cohort to track graduation completion rates for survey and do projections for estimated performance indicators. ABEST system entry.	LAR - projections (generally only in even years - due again 2008)	1-Jul	1-Sep	Peggy
	-	<b>Summer Internal Term Reporting</b>				
	S18	Update of Annual OIE calendar - Review annual calendar for changes/additions/deletions and time-frame modifications.	OIE Annual Calendar	15-Jun	15-Jul	Peggy



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**Note: Every effort will be made to meet timelines outlined below; However, timelines are tentative and subject to change based on priorities.**

	#	Description of Report	Report Title	Start Date	Due Date	Person(s) Responsible
	S19	Claritas Demographic Profile of 5 and 10 mile radius of UHCL - to understand our surrounding community and the students we serve by using spatial demographics - includes area ISD ethnicity changes - <b>Annual report only.</b>	Demographic Profile of 5 and 10 Mile Radius of UHCL	1-Jun	1-Aug	Peggy
	S20	Historical Enrollment/SCH/FTE by school and student career - beginning with 5 years of Fall, Spring, and Summer term data.	Historical Enrollment/SCH/FTE Report	20-Jul	15-Aug	Peggy
	S21	Term Enrollment Comparison of Headcount and SCH.	Enrollment Comparison of Headcount and SCH	30-Aug	15-Sep	Peggy
	S22	Base Year Comparison Report - done for funding years only.	Base Year Comparison Report	30-Aug	15-Sep	Peggy
	S23	Program Profile Reports - (replaces Enrollment Profiles) This report summarizes student demographic trend data for specific programs aggregated by CIP code for Fall terms. Used for Program Review.	Program Profile Report (due to the detail of this report due dates are tentative and my defer to early fall)	30-Aug	1-Oct	Pablo
	S24	Enrollment and Semester Credit Hours by School, Classification and Rubric - These data were derived using the certified CBM-004.	Enrollment and Semester Credit Hours by School, Classification and Rubric	30-Aug	1-Oct	Peggy
	S25	Community College GPA Report - This report provides average GPA data for UHCL undergraduate students, for students who transferred from the Gulf Coast Community Colleges. Data is divided out for each community college by major plan. In order to protect the privacy of individuals, average GPAs are not reported for categories with fewer than 5 students.	Community College GPA Report (for previous Spring term) - this report always done for the term preceding the current term since data are not available until the end of each term.	1-Jun	15-Jun	Mary



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	#	Description of Report	Report Title	Start Date	Due Date	Person(s) Responsible
	S26	End of Term GPA & Completions by Rubric Report - This report includes grade distribution per course section, average GPA by course section, % completion, and % A-C students completion.	End of Term GPA & Completions by Rubric Report - (for previous Spring term) - this report always done for the term preceding the current term since data are not available until the end of each term.	1-Jun	1-Jul	Pablo
	S27	Faculty 65/35 SCH Report - Fall and Spring only - for Glen Houston after CBM-008 and CBM-004 are certified generally towards the end of each long term.	Faculty 65/35 SCH Report (this report may be a carry over from the previous Spring term)	1-Jun	1-Jul	Pablo
	S28	Information requested by Jean Carr for Budget Projections - also include CBM-004 edit report with SCH by fund code - Cindy Lamb runs PS query to assist with this report.	Information requested by Jean Carr for Budget Projections	30-Jul	15-Aug	Peggy
	S29	Summary of Semester Credit Hours (SCH) by Location - On and Off campus SCH using the certified CBM-004 with fiscal year total - provided to Jean Carr - Annual report for all terms.	Summary of Semester Credit Hours (SCH) by Location	15-Jun	15-Jul	Peggy
	S30	Facts at a Glance - detailed student enrollment demographics.	Facts at a Glance	15-Aug	11-Sep	Mary / Peggy review
	S31	International Student by Residence Report	International Student by Residence	1-Nov	10-Nov	Peggy
	-	<b>Surveys - Creation and Analysis</b>				
	S32	Accounting Alumni Survey - every 2 years for Accounting accreditation.	Accounting Alumni Survey	1-Jul	15-Aug	Mary
	S33	President's Office Survey - This survey was conducted to collect information that will be used to further improve the services provided by the Office of the President staff at the University of Houston-Clear Lake (UHCL). Done once a year only.	President's Office Survey	Date pending notification from President's Office	Date pending notification from President's Office	Mary
	S34	OIE Customer Service Survey - to gauge client satisfaction and knowledge of OIE process and reporting cycle.	OIE Customer Service Survey	1-Jul	1-Aug	Mary
	S35	Library Survey.	Library Survey	Date pending	Date pending	Mary



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**Note: Every effort will be made to meet timelines outlined below; However, timelines are tentative and subject to change based on priorities.**

	#	Description of Report	Report Title	Start Date	Due Date	Person(s) Responsible
	S36	External survey requests will be reviewed by Director and Associate Director - due to a heavy survey workload for Fall and Spring terms - many external surveys (i.e., Peterson's, College Board, etc.) will be evaluated on a case by case basis. Most external surveys now go to Yvette Bendeck office	External Survey Requests	on-going	on-going	Miriam
	-	<b>Other Activities</b>				
	S37	OIE cross-training activities - to ensure staff are cross-trained on various software and process and procedures.	Cross-Training	on-going	on-going	Entire OIE Team
	S38	Ad-Hoc requests will be evaluated before agreed to and priority assigned as needed.	Ad-Hoc requests	on-going	on-going	Entire OIE Team
	S39	Business Account Reconciliation - done every month.	Reconciliation	2nd week of every month	3rd week of every month	Roxanne Hoffman
	S40	Purchasing and Office Administration.	Purchasing and Office Administration	on-going	on-going	Mary
	S41	Update of OIE website - continually add new reports/ continue to modify for customer ease of navigation.	OIE Website	on-going	on-going	Simone / Pablo / Peggy
	S42	University of Houston System data requests - includes enrollment data, graduation data, SCH, FTE requests and Pappas consultant requests.	University of Houston System data requests	on-going	on-going	Miriam
	S43	Peer Review activities	Peer Review activities	on-going	on-going	Entire OIE Team
	-	<b>Planning and Assessment</b>				
	S44	Planning and Assessment cross-training activities - to ensure staff are cross-trained on basics and software operation by Director.	Cross-Training	on-going	on-going	Entire OIE Team
	S45	Review Assessment Plans. OIE review all assessment plans for timely completion and issue a review report to Deans, Provost, and the President indicating the extent to which each plan meets the review criteria.	Review Assessment Plans	on-going	15-Jun	Simone



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	#	Description of Report	Report Title	Start Date	Due Date	Person(s) Responsible
	S46	SACS - Southern Association of Colleges and Schools - various activities associated with accreditation.	SACS Activities	on-going	15-Jun	Simone / Peggy / Mrinal
	S47	Assessment of core competencies – work with schools and faculty to develop assessment activities to assess core competencies (e.g., writing, critical thinking)	Assessment of core competencies	on-going	on-going	Simone
	-	<b>Special Projects or Special Requests that are not routine</b>				
	S48	4-Year Follow-up Report for Pappas Consulting Group	4-year write-up for Pappas consulting	on-going	on-going	Simone / Peggy
	S49	On behalf of Provost Stockton: Carnegie Elective Classification for Community Engagement meeting	Carnegie Elective Classification for Community Engagement	on-going	1-Aug	Peggy
	S50	Voluntary System of Accounting	VSA	on-going	on-going	Simone / Pablo
	S51	Chancellor Khator special data requests	Khator requests	on-going	on-going	Peggy / Pablo in Peggy's absence
	S52	Routinely asked to provide student distribution lists for external surveys that sometimes take considerable amounts of time	Routine Student Distribution Lists	on-going	on-going	Miriam / Miriam also train Mary as back-up
	S53	Represent UHCL in THECB meetings	Represent UHCL in THECB meetings	on-going	on-going	Simone / Mrinal
	S54	Pappas Consulting Group Enrollment Data	Comprehensive Student Enrollment Data	on-going	on-going	Miriam
	S55	Pearland Campus reporting for Glen Houston	Comprehensive Pearland Demographic data and students by Pearland area Zips Report	on-going	on-going	Peggy
	S56	Federal Acquisition & Course Contracting Survey	Federal Acquisition & Course Contracting Survey for Dr. Bruno	Spring	Spring	Mary