

## annual planning, assessment, and reporting calendar

The UT Martin Annual Planning, Assessment, and Reporting Calendar provides an overview of the activities and reports that establish the foundation for the university's data-driven decision making process. The planning and assessment goals and the activities and reports in the calendar that follows reflect the university's mission:

*The University of Tennessee at Martin educates and engages responsible citizens to lead and serve in a diverse world.*

UT Martin's commitment to establishing a strong culture of mission-focused planning and assessment extends throughout the institution. The activities and reports are listed under specific functional areas to show primary responsibility for planning, assessment, or reporting. However, overlap of the data and processes exists between the different areas, and the calendar activities are not considered mutually exclusive. Collection and analysis of data occurs over time and often begins in the weeks and months prior to the submission of reports as listed in the calendar. The calendar is intended to provide a guide toward achieving the overall planning and assessment goals.

### Planning and Assessment Goals

- ❖ To ensure institutional effectiveness through broad-based, mission-focused planning
- ❖ To integrate UT Martin Annual and Strategic Plans with UT System, THEC, Complete College Tennessee, and Tennessee Drive to 55 plans and initiatives
- ❖ To integrate mission-focused planning and assessment with UT Martin's budgeting process
- ❖ To sustain a campus culture for planning, assessment, and data-informed decision-making among academic and non-academic units at all levels
- ❖ To utilize research-based assessment data to inform and guide planning and to foster improvement (closing the loop)
- ❖ To involve all faculty and staff in planning and assessment processes in an appropriate manner

	<i>academic units</i>	<i>non-academic units</i>	<i>institutional data &amp; reports</i>	<i>budget</i>	<i>chancellor and staff</i>
<i>january</i>	<ul style="list-style-type: none"> <li>➤ Assessment Workshop</li> <li>➤ Review unit progress on Strategic Plan annual goals</li> <li>➤ General Education five-year reports due</li> </ul>	<ul style="list-style-type: none"> <li>➤ Assessment Workshop</li> <li>➤ Review unit progress on Strategic Plan annual goals</li> <li>➤ Student Affairs assessment reports due</li> <li>➤ Feedback provided—administrative support</li> </ul>	<ul style="list-style-type: none"> <li>➤ Delaware Cost Study</li> <li>➤ BOT Financial Aid</li> <li>➤ WIA Quarterly Student Report</li> <li>➤ THEC Enrollment Editing</li> <li>➤ AAUP Faculty Compensation Survey</li> <li>➤ CUPA Survey <ul style="list-style-type: none"> <li>▪ IR - Student Data to HR</li> <li>▪ HR Salary Survey</li> </ul> </li> <li>➤ SACS COC Institutional Profile</li> </ul>	<ul style="list-style-type: none"> <li>➤ Units use goals of UTM Strategic Plan, unit goals, and assessment data to develop budget requests</li> <li>➤ Units submit budget requests to VCs</li> </ul>	<ul style="list-style-type: none"> <li>➤ Mid-Year Retreat</li> <li>➤ Review progress on Strategic Plan goals</li> <li>➤ Enrollment Projections</li> <li>➤ Develop Planning Assumptions</li> <li>➤ Annual Spring Open Forum</li> <li>➤ UT Board of Trustees Action Items submitted</li> <li>➤ UT Board of Trustees Informational Items submitted</li> </ul>
<i>february</i>	<ul style="list-style-type: none"> <li>➤ Non-accredited Program Review self-studies due</li> <li>➤ Vet Tech Program annual report due</li> <li>➤ Faculty Senate Committee on Instruction reviews General Education five-year reports</li> </ul>	<ul style="list-style-type: none"> <li>➤ Feedback provided—student affairs</li> </ul>	<ul style="list-style-type: none"> <li>➤ Workload Report</li> <li>➤ Department Reports</li> <li>➤ IPEDS <ul style="list-style-type: none"> <li>▪ Student Financial Aid</li> <li>▪ Graduation Rates</li> <li>▪ 200% Graduation Rates</li> <li>▪ Admissions</li> <li>▪ Outcomes Measures</li> </ul> </li> <li>➤ Princeton CDS-RDS</li> <li>➤ Peterson's Undergraduate Survey</li> <li>➤ GSS - NSF Part 2 Graduate Survey</li> <li>➤ GRE</li> <li>➤ THEC Factbook Submissions</li> <li>➤ System Space Standards Report</li> <li>➤ SACUBO Benchmarking Survey - Finance</li> <li>➤ NSSE data collection</li> <li>➤ FSSE data collection (5 yr cycle)</li> </ul>	<ul style="list-style-type: none"> <li>➤ VCs submit budget requests to VCFA</li> <li>➤ Capital Budget requests due to UT System</li> <li>➤ Review mid-year budget projections</li> <li>➤ Recommend current year adjustments</li> </ul>	
<i>march</i>	<ul style="list-style-type: none"> <li>➤ Non-accredited Program Review on-site visits</li> <li>➤ Individual Performance Review conference reports due for support staff</li> <li>➤ Assessment Coordination Committees provide reports to Assessment Oversight Committee</li> </ul>	<ul style="list-style-type: none"> <li>➤ Individual Performance Review conference reports due</li> <li>➤ Assessment Coordination Committees provide reports to Assessment Oversight Committee</li> </ul>	<ul style="list-style-type: none"> <li>➤ ACT Class Profile</li> <li>➤ IPEDS - NCAA Athletics</li> <li>➤ CSRDE Survey - Section 1</li> <li>➤ Peterson's Graduate Survey</li> <li>➤ CGS International Graduate Survey Preliminary Applications</li> </ul>	<ul style="list-style-type: none"> <li>➤ Draft proposed budget prepared</li> </ul>	<ul style="list-style-type: none"> <li>➤ Review budget proposal and make recommendations to Chancellor</li> <li>➤ Faculty Senate Annual Spring Faculty Meeting report</li> </ul>

	<i>academic units</i>	<i>non-academic units</i>	<i>institutional data &amp; reports</i>	<i>budget</i>	<i>chancellor and staff</i>
<i>april</i>	<ul style="list-style-type: none"> <li>➤ Assessment Oversight Committee makes recommendations to Chancellor</li> <li>➤ Non-accredited Program Review on-site visits</li> <li>➤ Assessment Day Poster Session</li> <li>➤ Assessment Committee reports posted</li> </ul>	<ul style="list-style-type: none"> <li>➤ Assessment Oversight Committee makes recommendations to Chancellor</li> <li>➤ Assessment Day Poster Session</li> <li>➤ Administrative and Student Affairs unit assessment reports posted</li> <li>➤ Assessment Committee reports posted</li> </ul>	<ul style="list-style-type: none"> <li>➤ IPEDS <ul style="list-style-type: none"> <li>▪ Human Resources</li> <li>▪ Fall Enrollment</li> <li>▪ Finance</li> <li>▪ Academic Libraries</li> </ul> </li> <li>➤ AACSB - Business</li> <li>➤ Computer Science Survey</li> <li>➤ Wintergreen Orchard House Survey</li> <li>➤ Princeton Review Gluten and Allergy Free Dining Survey</li> <li>➤ ACT Institutional Data Questionnaire</li> <li>➤ WIA Quarterly Student Report</li> <li>➤ US News Finance Statistical Survey</li> </ul>	<ul style="list-style-type: none"> <li>➤ Requests for student tuition and fees due to UT System</li> <li>➤ Budget revisions for Probable Budgets due</li> </ul>	<ul style="list-style-type: none"> <li>➤ Review progress on goals</li> <li>➤ Review of institutional data</li> </ul>
<i>may</i>	<ul style="list-style-type: none"> <li>➤ Annual Plan Goals for next fiscal year due</li> </ul>	<ul style="list-style-type: none"> <li>➤ Annual Plan Goals for next fiscal year due</li> </ul>	<ul style="list-style-type: none"> <li>➤ US News - Main Survey</li> <li>➤ ABET - Engineering</li> <li>➤ CSRDE - STEM Survey - Sections II and III</li> <li>➤ Peterson's <ul style="list-style-type: none"> <li>▪ Distance Learning Survey</li> <li>▪ Learning Disabilities Survey</li> <li>▪ Visual and Fine Arts Survey</li> </ul> </li> <li>➤ UTM receives general education data results, MFT data results</li> </ul>	<ul style="list-style-type: none"> <li>➤ Submit proposed budget to UT System</li> <li>➤ Campus Operating Budget Meeting with UT System</li> <li>➤ Campus Capital Budget Meeting with UT System</li> </ul>	<ul style="list-style-type: none"> <li>➤ UT Board of Trustees Action Items submitted</li> <li>➤ UT Board of Trustees Informational Items submitted</li> </ul>
<i>june</i>	<ul style="list-style-type: none"> <li>➤ Promotion and Tenure process ends</li> </ul>		<ul style="list-style-type: none"> <li>➤ Peterson's Financial Aid Survey</li> <li>➤ US News Distance Learning Survey</li> <li>➤ Update Tuition and Fees on Surveys: <ul style="list-style-type: none"> <li>▪ CDS</li> <li>▪ Wintergreen</li> <li>▪ Princeton</li> <li>▪ Barron</li> </ul> </li> <li>➤ UTM Factbook - Finance</li> <li>➤ Historical Enrollment Updates</li> <li>➤ NSSE Peer Selection</li> </ul>		

	<i>academic units</i>	<i>non-academic units</i>	<i>institutional data &amp; reports</i>	<i>budget</i>	<i>chancellor and staff</i>
<i>july</i>			<ul style="list-style-type: none"> <li>➤ Institutional Research and Evaluation Survey</li> <li>➤ WIA Quarterly Student Report</li> <li>➤ CSRDE - Transfer Survey Section IV</li> <li>➤ Princeton UG Entrepreneurship Survey</li> <li>➤ Computer Science ABET Report</li> <li>➤ THEC Enrollment Editing</li> <li>➤ THEC Performance Funding Report</li> <li>➤ SACS COC Financial Profile</li> </ul>	<ul style="list-style-type: none"> <li>➤ Budgets and Responses to Budget Requests distributed to budgetary units</li> </ul>	<ul style="list-style-type: none"> <li>➤ Strategic Plan annual reports due</li> <li>➤ VCs complete divisional Annual Plan Progress Reports on preceding year</li> <li>➤ VCs develop divisional Annual Plans for upcoming year</li> </ul>
<i>august</i>	<ul style="list-style-type: none"> <li>➤ Fall Opening Faculty Meeting</li> <li>➤ College and Departmental Retreats to review data and close the loop</li> </ul>		<ul style="list-style-type: none"> <li>➤ Best for Vets Survey</li> <li>➤ US News <ul style="list-style-type: none"> <li>▪ Online Undergraduate Survey</li> <li>▪ Online Graduate MBA Survey</li> <li>▪ Online Graduate Education Survey</li> </ul> </li> <li>➤ UTFI Annual Report</li> </ul>		<ul style="list-style-type: none"> <li>➤ Finalize UTM Annual Plan</li> <li>➤ Update UTM Strategic Plan</li> <li>➤ Administrative Retreat</li> <li>➤ Disseminate updated Strategic Plan to all units</li> </ul>
<i>september</i>	<ul style="list-style-type: none"> <li>➤ Faculty performance review conference reports due</li> <li>➤ Program five-year self-study process begins</li> </ul>		<ul style="list-style-type: none"> <li>➤ Workload Report</li> <li>➤ Departmental reports including General Education and MFT results analysis</li> <li>➤ Military Advanced Education and Transition Survey</li> <li>➤ THEC Enrollment Editing</li> <li>➤ Military Friendly School Survey</li> <li>➤ UT BOT Student Report</li> <li>➤ IPEDS <ul style="list-style-type: none"> <li>▪ Reporting Map</li> <li>▪ Institution Identification</li> </ul> </li> <li>➤ Common Data Set</li> <li>➤ UTM Factbook - Student Data</li> <li>➤ Financial Aid Shopping Sheet</li> </ul>		<ul style="list-style-type: none"> <li>➤ Assess actual fall enrollment</li> <li>➤ UT Board of Trustees Action Items submitted</li> <li>➤ UT Board of Trustees Informational Items submitted</li> </ul>

	<i>academic units</i>	<i>non-academic units</i>	<i>institutional data &amp; reports</i>	<i>budget</i>	<i>chancellor and staff</i>
<i>october</i>	<ul style="list-style-type: none"> <li>➤ Program SLO annual reports due</li> <li>➤ General Education annual reports due</li> <li>➤ Research and service annual reports due</li> </ul>		<ul style="list-style-type: none"> <li>➤ WIA Quarterly Student Report</li> <li>➤ ACT - CSRDE</li> <li>➤ Peterson's College Graduate Survey Phase I</li> <li>➤ IPEDS <ul style="list-style-type: none"> <li>▪ Institutional Characteristics</li> <li>▪ Completions Survey</li> <li>▪ 12 Month Enrollment Survey</li> </ul> </li> <li>➤ Delaware Results Analysis</li> <li>➤ UTFI Endowment Reports</li> </ul>	<ul style="list-style-type: none"> <li>➤ Revise budget based on enrollment data</li> <li>➤ Revised budget to UT System</li> <li>➤ Initial budget revisions due</li> </ul>	<ul style="list-style-type: none"> <li>➤ Review of institutional data</li> <li>➤ Faculty Senate Annual Fall Faculty Meeting report</li> </ul>
<i>november</i>	<ul style="list-style-type: none"> <li>➤ Feedback on program SLO reports</li> <li>➤ Response to five-year review committee recommendations due</li> <li>➤ Assessment committees review research and service reports</li> <li>➤ Committee on Instruction reviews general education reports</li> </ul>	<ul style="list-style-type: none"> <li>➤ Non-academic and Student Affairs units review assessment reports and close the loop</li> </ul>	<ul style="list-style-type: none"> <li>➤ Common Data Set Financial Aid</li> <li>➤ UTM Factbook - Financial Aid</li> <li>➤ CGS Graduate Enrollment Applications</li> <li>➤ Barron's Survey</li> <li>➤ UT BOT retreat information</li> <li>➤ NSSE Data Analysis</li> <li>➤ FSSE Data Analysis (5 yr cycle)</li> </ul>		
<i>december</i>	<ul style="list-style-type: none"> <li>➤ Tenure/promotion process begins</li> <li>➤ Program SLO, general education, research, and service annual reports posted</li> </ul>	<ul style="list-style-type: none"> <li>➤ Administrative unit assessment reports due</li> </ul>	<ul style="list-style-type: none"> <li>➤ Best for Vets - Business School</li> <li>➤ Annual Survey of College (College Board Survey)</li> <li>➤ Delaware Cost Study Course Information Work</li> <li>➤ SACS COC Enrollment File</li> </ul>		<ul style="list-style-type: none"> <li>➤ Mid-year progress reports on Annual Goals</li> </ul>

## Glossary of Abbreviations

AACSB	Association to Advance Collegiate Schools of Business
AAUP	American Association of University Professors
ABET	Accreditation Board for Engineering Technology
ACT	American College Test
BOT	Board of Trustees
CDS	Common Data Set
CGS	Council of Graduate Schools
CSRDE	Consortium for Student Retention Data Exchange
CUPA	College University Professional Association
FSSE	Faculty Survey of Student Engagement GRE Graduate Record Exam
GSS	Graduate Student Survey
HR	Human Resources
IPEDS	Integrated Postsecondary Education Data System
IR	Institutional Research
MFT	Major Field Test
NCAA	National Collegiate Athletic Association
NSSE	National Survey of Student Engagement NSF National Science Foundation
RDS	Reference Data Set
SACS COC	Southern Association of Colleges and Schools Commission on Colleges
SACUBO	Southern Association of College and University Business Officers
SLO	Student Learning Outcome
STEM	Science, Technology, Engineering, and Mathematics
THEC	Tennessee Higher Education Commission
UG	Undergraduate
UTFI	University of Tennessee Foundation
VCFA	Vice Chancellor for Finance and Administration
VCs	Vice Chancellors
WIA	Workforce Investment Act