

UNIT PLAN AND ASSESSMENT REPORT

- Why?
 - Need to establish and document how each segment of the university will be contributing to achieving the Excellence, Engagement, and Expansion imperatives of the “Momentum 2015” strategic plan.
 - Need to assess performance and document strategies for improvement of programs and services
 - Need to provide a documented basis for requests for additional funding
 - The Southern Association of Colleges and Schools requires institutions to demonstrate that they have a documented ongoing program of Institutional Effectiveness that includes regular assessment and use of assessment findings for institutional improvement.
- The “big picture” overview of how this ought to work
- Assessment/Unit Plan Principles
 - The assessment and unit plan system should not involve unnecessary duplicative work
 - It should integrate with Academic Program Review documentation and follow up tasks
 - It should incorporate the kinds of information routinely collected to support promotion and tenure decisions
 - It should form the foundation and rationale for requests for additional financial and personnel resources needed to increase engagement, keep up with expansion, and pursue excellence
- What is a Unit Plan and Assessment Report?
 - Academic Program example
 - Administrative support unit example
- How to do this?
 - Download an excel template from the Planning and Institutional Effectiveness web site: <http://pie.tamucc.edu/>
 - Fill out relevant university goals by copy and paste from information on the green tab sheet (the worksheet cells will wrap text and expand as needed)
 - Type program mission statement (located degree program description in the current University Catalog)
 - Fill out program objectives, measurement sources, expected performance, actual performance will probably be blank this year
 - Fill out current year plan page
- How to get information and help?
 - Enrollment and faculty data is on PIE site

- Opinion survey research is also available in the same location
- PIE staff -- Paul Orser, Associate Vice President for Planning and Institutional Effectiveness, and Bridgette Hardin (for survey information)
- Dave Billeaux, Associate VP for Academic Affairs, for program review and academic program issues.

- Responsibility
 - Maintaining Unit Plan and Assessment Report forms for each discipline and degree level is the responsibility of the Department Chair
 - Departmental reports are sent to the College Dean for review and approval, and then to the Provost for review and approval.
 - An electronic copy of each completed and approved report is sent to the office of Planning and Institutional Effectiveness, where it will be converted to Adobe PDF and assembled as part of a university assessment report that will be available on the web when completed.

- Projected Annual Timetable
 - Assessment reports will cover the fiscal Year (September 1 through August 31)
 - Assessment reports and unit plans are to be completed at the departmental level and submitted to the College Dean by November 1.
 - Reports should be reviewed and approved by the College Dean and Provost by December 1
 - Approved reports due from Vice Presidents to Planning and Institutional Effectiveness by December 15