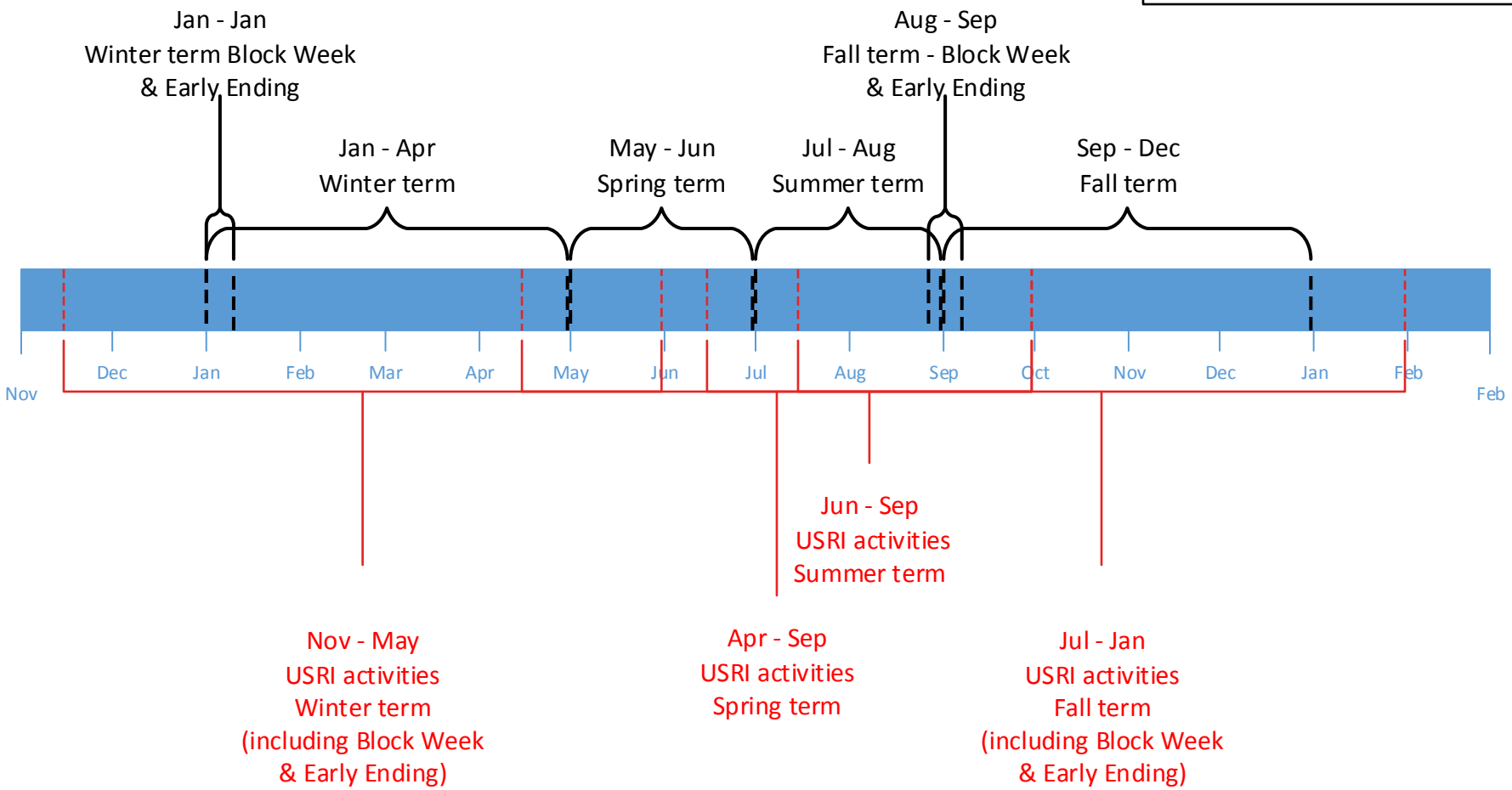
USRI Annual Timeline

Phil Johnston, Special Projects Administrator
Office of Institutional Analysis
August 2018

USRI Cycles – 6 each year

Winter Block Week & Early Ending
Winter
Spring
Summer
Fall Block Week & Early Ending
Fall



USRI Process

August 2018, Phil Johnston – Special Projects Administrator

	Timeline	USRI Coordiantor / OIA Office	USRI Administrators (Within Faculties / Departments)	IT Services	Printing Services
Term commencement	About 3 days	**Create term initiation email with detailed instructions for Printing Services about requirements & key dates.** Email this to Printing Servcies. Cognos → Excel **Create initial Validation File /list of courses to be evaluated by USRI / Fac Survey. Edit and parse list for each relevant Faculty / Department** Email this list to USRI Admins to review / correct.			**Confirm dates & request.**
USRI Admins review	About 2 - 3 weeks		**Confirmation / Verification of Validation File.** Admin verifies their course list. Makes any needed corrections / updates to course timetable (PeopleSoft). Notifies OIA of any special requests (e.g., not evaluating). Notifies OIA of any exemptions.		
Validation File finalization and other supporting documents	About 1 - 2 weeks	Cognos → Excel **Create 2nd Validation File /list of courses to be evaluated by USRI / Fac Survey. Integrate USRI Admin feedback.** This becomes a working file & is used throughout the evaluation period. Email course and (later on) student Excel files to IT to load into Class Climate. **Create electronic Faculty Surveys in ClassClimate and paper Faculty surveys for SSE courses where required.** **Using ClassClimate batch events, create Coversheets (PDF) for each Paper-based survey.** Make notes on working file for USRI & Faculty Surveys (paper & electronic). **Update Delivery Contact list & Course checklist for Printing Services** **Using course Validation File, create USRI & Faculty Survey envelope labels** (for courses requiring paper surveys) Send to Printing Services (via shared folder): • PDFs of paper-based survey instruments (USRIs and Faculty Surveys) • PDFs of Coversheets • Checklist • Delivery List • Label files		**IT loads both files into ClassClimate.** IT generates USRI surveys with USRI8v2 for paper-based evals, and URSI11v2 for online courses. At this point online surveys are accessible to students via link in their portal, but students have not yet been notified.	
Survey package creation	About 3 - 4 weeks				**Prints surveys, matches to labels / envelopes.** **Printing delivers surveys to departments.**
Evaluation period	About 3 - 4 weeks	**Manual coversheet method:** Send forms (blank coversheets and survey instruments) to Admins as requested (e.g., courses that were not on the course file, but can now be included). Document on Validation File. USRI Coordinator may receive ongoing special requests from Admins that will require updates to ClassClimate surveys (e.g., change paper survey to online survey). **Send email reminders for online surveys through ClassClimate.**	**Admins receive USRI and Faculty Survey envelopes and are requested to check their delivery is complete.** **Complete?** No Yes **Admins conduct USRI and Faculty evaluations in classes.**		
Scanning and quality checks	About 3 - 4 weeks	About a week after the evaluation period has closed for paper-surveys, lock electronic surveys. Cognos → Excel **Quality Checks (several times as needed):** • Courses with > 100% of students responding • Courses with no results • Courses with error rate > 15% • Troubleshoot problems and rescan where required. • Missing data: Contact admins to investigate. Validation File notes: Log any necessary information impacting reports (e.g., multiple instructors, courses evaluated together, Admins switching evaluations in error).	**Admins collect and return USRI envelopes to Printing Services. Admins keep paper Faculty surveys (except Schulich School of Engineering).** Admin confirms whether courses were evaluated. If evaluated, then they & OIA need to find the survey or account for the missing data. May need to dig in archive boxes to locate them. **Admin retrieves any missing envelopes and returns them to Printing Services**		**Scans surveys & re-scans if needed.** (3 weeks for scanning) Once all scanning is completed, all survey envelopes placed in Archive Boxes. USRI surveys remain at Printing Services storage for about a year. Then boxes will be shipped to University Archives.
USRI Publication	**Release dates:** Fall (January 15) Winter (May 15) Spring & Summer (September 15)	**Email Admins that USRI results are ready.** **Request IT to lock electronic surveys in Class Climate at end of survey cycle.**	**Admins notify their departments.**		
Term conclusion		**For online Faculty Surveys and SSE paper Faculty Surveys create PDFs and send to Admins.**			
		Continual: Maintain USRI Reporting System list of users. Submit Enterprise Reporting Access form. **Continual: Onboard new USRI Admins.** **Continual: Ad hoc requests from USRI admins, Instructors, and Academic Leaders.**		IT Support helps with login issues to USRI Reporting System.	