MEMORANDUM

March 15, 2021

TO: Erika Lacro, Vice President for Community Colleges
FROM: Ardis Eschenberg, Chancellor Lead for IR workgroup
RE: Institutional Research (IR) 2021 work plan

This memorandum is submitted on behalf of the IR workgroup and provides additional detail, description, and a pilot work plan to the IR 11/9/2020 recommendations towards a centrally coordinated, collaborative UHCC IR resources model. The intent of a redesigned IR is one where the institutional effectiveness for every campus will be improved through the utilization of system-wide, strengths-based IR resources, reduction of inefficiencies, and promotion towards a system-wide culture that values using information to improve current practices and to plan for the future. The recommended next steps towards implementing a redesigned IR are:

1. Completion of an IR needs assessment by campus,
2. Identification of the core and common functions to be centralized,
3. Launching a shared, public UHCC IR Dashboard Directory,
4. Implementing coordinated project management workflow based on the needs assessment, and
5. Pilot of the collaborative model through meeting the IR needs of Kauai Community College.

The IR workgroup will be discussing these next steps with all UHCC IR personnel and with other relevant parties including the UH System Institutional Research, Analysis and Planning Office (IRAPO). Official movement or transfer of IR positions are not recommended at this time. Allocation of IR personnel time and authority of assigning workload, however, are to be explored in the collaborative, centrally coordinated model.

IR Needs Assessment By Campus (3 months | March 2021-June 2021)

The workgroup will lead IR needs assessments at each campus to identify with stakeholders (administration, students, staff, faculty and grants community, etc.) the current and projected needs from IR resources. All campuses (and OVPCC system) have prior year data on the various activities and requests made to the unit from internal and external sources and have an inventory of core projects and functions that IR units manage for compliance, data governance, and strategic or local initiatives.
The IR needs assessment is recommended to begin in the Spring 2021 semester for completion in June 2021. Administration will be tasked to give a strategic prioritization of the many needs that have historically been serviced by IR. At this time of limited resourcing, noting that all are asked to “do more with less,” IR is requesting candid insight and strict prioritization from leaders and decision makers on the separation of identifying the core, must-have IR functions and the range of lower value work requests and demands. The needs assessment will inform both the scope of the functions to be centralized and the process of central coordination.

**Identifying Functions to be Centralized (6 months | March 2021- September 2021)**

There are operational efficiencies to be gained by centralization of common IR activities that may be repeated at every campus. Examples of this practice are already in place for system-level projects:

- UHCC Strategic Directions & Performance Metrics;
- Annual Report of Program Data (ARPD) and Workforce Career Explorer;
- ACCJC Annual Reports, in part;
- Graduate Leavers Survey;
- Enrollment Management;
- Federal Perkins V CTE Reporting;
- Retention, Graduation, Transfer Tracking, Student Right to Know; and
- Integrated Postsecondary Education Data System (IPEDS) - at UH 10-campus IRAPO system office.

Over the next six months, we propose to identify and implement appropriate centrally coordinated IR functions based on our assessment findings. Areas may include the following:

- Community Colleges Survey on Student Engagement (CCSSE) - this external survey has traditionally been administered (and resourced) at the campus-level to inform institutional practice and better understand student attitudes, behaviors, and engagement. Central coordination of the next administration of this survey - or its designated alternative - is recommended for consideration;
- Common recurring requests from federal or national partners;
- Benchmarking and information on peer institutions such as membership in National Community College Benchmarking Project (NCCBP);
- Training for IR staff (strengths-based PD on IR needs such as SQL coding, Tableau dashboard design, ODS access and background on tables and views for new IR employees);
- Training for the University Community on accessing and requesting data, interpreting available dashboards, interpreting and using ARPD, and utilizing information;
- NC-SARA Reporting;
- Course Management Software - standardization and common procurement;
- Assessment Software - standardization and common procurement; and
- Centralized repository of SQL scripts to ensure cohesive data reporting.
Functions that occur across the 10-campus system will also be identified and recommended for system coordination and management with UH IRAPO.

**Launch of Shared UHCC Dashboard Directory (4 months | March 2021 - July 2021)**

The workgroup believes that interactive, well-designed, and broadly-available dashboards coupled with proactive training for campus stakeholders and data users are key IR redesign strategies. It will boost the use of information towards institutional effectiveness (for both campuses and the system) and reduce the demand for customized ad-hoc requests placed on IR. The dynamic displays of data will be sourced from ODS tables with common data definitions across the system for accuracy and consistency with proper maintenance from System.

The work plan is to develop and launch, by July 2021, the identified core data elements expected to be of the highest use by campuses in data dashboards publicly accessible on a UHCC website. The following dashboards are expected to be presented:

1. **Institutional Measures**
   a. Admissions
   b. Enrollment
   c. Degrees & Certificates
   d. Student Achievement Measures

2. **Course**
   a. Course Enrollment and Fill Rate
   b. Success Rates
   c. Course Trend Data to division, department, and program
   d. Distance, Hybrid, and Online Education

3. **Faculty**
   a. Workload Report

4. **Program**
   a. Annual Report on Program Data
   b. Workforce Outcomes

5. **Strategic Initiatives**
   a. UHCC Performance Indicators
   b. Math & English Co-requisite and First-year Success
   c. Transfer Measures
   d. Equity Report on all institutional measures

An emphasis for this deliverable will be to design for broad dissemination via Tableau public. This would allow all users access to the information (as opposed to limiting access only to individuals with Tableau viewer licenses). Individual tableau licenses should continue to be used for internal reports with detailed, restricted, and/or record level data. The recommendation is continued training and utility of Tableau Data visualization platform, which is scheduled to
complete year 3 of 3 on a UHCC system contract in September 2022. Continued support for training would assist Tableau creators and explorers in using the platform (as well as querying the right UH institutional data) to prepare intuitive, user-friendly data visualization dashboards.

Kaua‘i Community College as the Pilot (9 months | March 2021 - December 2021)
The workgroup has identified Kauai CC as the pilot for central coordination of IR support. It is noted that Kauai has no IR staffing but has a clear picture of what their campus IR needs are from a minimal, compliance level to a well-resourced level. The OVPCC data team is providing the basic IR support for Kauai to “keep the lights on,” though this is not a long-term solution or strategy. The pilot is valuable not only in meeting the needs of the Kaua‘i CC but in figuring out how to best operationalize IR resources from other campuses/units in a positive way.

Managing IR Workflow, Allocating IR Requests, and IR Resources (12 months | July 2021 - July 2022)
Cross-campus, centralized IR may require additional resources such as project management and Institutional Analyst resources/staffing at the system or multi-campus level. Based on the needs assessment, a more sophisticated or simplified project management approach may be utilized to:

- Receive, vet, and improve the quality of data requests from internal and external constituents;
- Allocate cross-campus IR projects and tasks to system-wide IR resources;
- Inform team members and key stakeholders of timelines and deliverable due dates;
- Create a centralized repository to house project information, track successful completion, and provide continued evaluation for IR improvements;
- Provide the training and technical assistance necessary to support IR staff and campus data users.

Another corollary to the IR needs assessment is in understanding the capacity of IR. It is noted that campuses may already have limited IR support to meet the IR demands of their home campus, which may hamper their ability or motivation to work across system. Table 1. provides a count of current IR analyst G-funded positions and reflects that investment at the campus or system level may be needed. Five campuses - Kapi‘olani, Kaua‘i, Leeward, Maui, and Windward - have each lost one or all of their senior Institutional Analysts and only one campus has a dedicated IT Specialist.

Finally, coordination of IR is also intended to capitalize on our strengths-based assets. Among the existing IR personnel, there are strengths and areas of expertise that when used together could provide for better IR products and service for all campuses. Skill-set champions also benefit the ongoing capacity of the system-wide IR team through collaboration, professional development and documentation towards a strategy for tacit knowledge management.
Ongoing Evaluation (12 months | July 2021 - July 2022)

The next steps proposed in this memorandum are to be assessed regularly to ensure that IR operational changes lead to intended improvements. As the “Repositioning the University for 2022” process continues to evolve across various units and programmatic areas, it is imperative that IR support the University as a source for accurate and timely information for institutional planning, decision-making, and policy formulation and implementation.

Table 1. Institutional Research, Inventory of Filled Position Count, Spring 2021

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