Administrative Activities Review (AAR)
Institutional Research

I. Basic Facts and Description
   a. Mission and goals: The Office of Institutional Research supports the mission of The University of Akron by providing consistent, accurate and timely information to ensure that decisions are informed by evidence. We ensure the validity and reliability of information that is essential and determines the success of a project. We facilitate planning and provide information and analyses. We monitor and benchmark UA’s performance and help evaluate its effectiveness. Institutional Research should be the repository for definitions and reporting standards that allow clear communication between divisions.

Short-term Priorities
   • Manage the delivery and accurate submission of mandatory state and federal reporting including the Ohio Department of Higher Education (HEI) and (IPEDS)
     o Improve HEI process
       ▪ Reduce manual intervention by the continued enhancement and development of new SQRs to assist with data extraction and preparation
       ▪ Create data validation process to ensure data accuracy prior to submission
     o Improve IPEDS process
       ▪ Research more efficient delivery methods
       ▪ Develop new queries in Oracle Analytics Cloud (OAC) for increased consistency and accuracy
   • Assist in the preparation and distribution of information on behalf of campus constituencies for the timely completion of external accreditations (HLC) and both internal and external studies (academic program review, faculty salary market compression study, economic impact study)
   • Provide accurate institutional data to UA personnel, departments and committees on a timely basis.
     o Standard and consistent reporting
       ▪ Migrate existing Student Administration Reports (ZipReports) with the development of new reports utilizing OAC. Reports include Degrees Awarded, Class Information (Class Enrollment, Seat Availability, Class List), Currently Enrolled, Applicant Information, and Active Students.
       ▪ Provide OAC training to the ZipReport user community
       ▪ Develop new operational reports maintained by Institutional Research on behalf of Enrollment Management, Admissions, and Advising utilizing OAC. Reports include Detail Applicant queries, Course Comparison, NOW query.
• Assist Information Technology with transferring the UA Dashboards created by EY to an on-premise platform.
• Create a Data Dictionary for standard reporting.
  o Manage the existing UA Dashboards developed by E&Y
    ▪ Maintain dashboard committee, UA website, issues
    ▪ Data Validation on monthly basis
  o Communication Delivery Channels
    ▪ Develop and implement plan to deliver improved communication with IR’s customers through various channels
    ▪ IR Website
    ▪ Oracle Analytics Cloud
    ▪ UA Dashboards

Long-Term Goals
IR’s long–term goals are to continue to improve our capabilities and to move from primarily compliance and data reporting to develop deeper and broader information and analysis for UA leadership. Specific goals are as follows:

• Achieve consensus on the metrics and data to include in reporting and analytical tools (OAC and dashboards)
• Be involved in the development of an institutional strategic plan and provide environmental scanning and progress updates to the plan
• Investigate the development of surveys to collect qualitative data (e.g., satisfaction surveys for students, staff and faculty)
• Add additional staff to expand our analytics capabilities and capacity to preemptively identify university information needs through the establishment and implementation of analytical reports to be developed during the academic year based on university priorities and areas emerging from the strategic planning process.
• Participate in professional development (all staff)

b. Services
The office of Institutional Research’s primary service is mandated compliance reporting. We coordinate federally mandated IPEDS surveys and are the HEI liaison coordinating the submission of all state-mandated longitudinal data files.

Integrated Postsecondary Education Data System (IPEDS) - IPEDS provides basic data needed to describe and analyze trends in postsecondary education in the United States, in terms of the numbers of students enrolled, financial aid used, staff employed, dollars expended, and degrees and certificates earned. Congress, federal agencies, state governments, education providers, professional associations, private businesses, media, students and parents, and others rely on IPEDS data for this basic information. IPEDS data are used at the
federal and state level for policy analysis and development and at the
institutional level for benchmarking and peer analysis.

IPEDS also forms the institutional sampling frame for other NCES postsecondary
surveys, such as the National Postsecondary Student Aid Study and the National
Survey of Postsecondary Faculty.

*Higher Education Information System (HEI)* – HEI provides data that is used for a
variety of purposes that include reporting on higher education outcomes,
funding formula and financial aid program support, policy analysis and strategic
planning. HEI data are used at the state level for policy analysis and
development and at the institutional level for benchmarking and peer analysis.

*Accreditation and Assessment* - The Higher Learning Commission (HLC) requires
each member institution to provide an update on its organizational health
through an Institutional Update. IR works closely with the Office of Academic
Affairs and the division of Finance and Administration to produce the required
data.

We also provide data to college/departments for academic program and
discipline accreditations. Some, but not all, of the accrediting agencies for which
we provide data: Association to Advance Collegiate Schools of Business,
Accreditation Board for Engineering and Technology, Accreditation Council for
Business Schools and Programs, National Association of Schools of Art and
Design and the National Council for Accreditation of Teacher Education (NCATE).

The department could not perform effectively without our partnerships
throughout the university as our reporting touches nearly all segments and
functions across campus: Information Technology, Admissions, Registrar,
Financial Aid, Finance and Administration, Human Resources, UA Library,
Assessment and Capital Planning and Facilities Management. Our partnerships
with the support team at IPEDS and the HEI team in the Department of Higher
Education are also critical to our success.

IPEDS – 12 surveys; Each survey is submitted once per year
- Fall – Institutional Characteristics, Completions, 12-Month Enrollment
- Winter – Student Financial Aid, Graduation Rates, 200% Graduation Rates,
  Admissions, Outcome Measures
- Spring – Fall Enrollment, Finance, Human Resources and Academic Libraries

HEI – 15 files
- Academic Programs – List of all active and inactive programs submitted
  three times per year.
- Enrollment and Financial Aid – Eight files submitted three times per year
  (Student Entrance, Student Enrollment, Alternative Credit, Cross
Registration, Course Enrollment, Course Inventory, Off-Campus Course Sections Taught); Degree-Certificate Earned, Credit Update, Undergraduate Financial Aid and Undergraduate Tuition & Fees are submitted on an annual basis.

- Facilities – Physical Inventory, Area Inventory, Course Section Schedule and Other Use of Instructional Rooms are submitted on an annual basis.
- College Credit Plus – Student Data File and the Alternate Funding File submitted once per semester; College Readiness Assessment file submitted annually.

The second major service of IR is the design, development, and delivery of institutional data, reports and dashboards to the University community. The successful dissemination of accurate and consistent information is dependent upon functional tasks performed by Institutional Research. These functional tasks are as follows (but not limited to):

- Data Management
  - Cleanse, prep, and massage data for consistent official reporting
- Query development and data extraction from university systems
  - Routine and custom ad hoc queries
  - Management of scheduled jobs for operational processes and reporting
- Database management and storage
  - Census extract files
- Resolution of data reporting issues
  - Debug, monitor and troubleshoot business intelligence dashboards, queries, and analyses
  - Identify, test, and implement solutions
  - Audit reports to ensure data integrity
- Technical guidance, support, and training for user facing tools
  - Oracle Analytics Cloud (Student Administration Reports)
  - Hyperion (ZipReports)
  - Tableau (UA Dashboards)
- Delivery of information
  - UA Website
  - SharePoint
  - ZipReports
  - Oracle Analytics Cloud
  - UA Dashboards

The department of Information Technology plays a vital role in the success of the functional tasks performed by Institutional Research. This significant relationship helps to bridge the gap between technology and data consumers.

Other important partnerships are with our college counterparts and operational experts (Admissions, Financial Aid, Registrar). Their insight into operational processes add
tremendous value in the development of queries, dashboards, and reports which are meaningful and consistent. In addition, collaborating with UA colleges and departments facilitates the unification of data, eliminates duplicate effort, reduces inconsistency of reports and creates more knowledgeable data consumers.

There is a tremendous opportunity for Institutional Research to provide strategic and functional oversight on behalf of the University and manage the overall execution of activities related to the design, development and delivery of institutional data, reports and dashboards that empower decision making at the tactical and operational level.

The third major service is to provide information for decision support for university initiatives in the form of routine and ad hoc reports, analyses, alerts and forecasts. We provide information to nearly all university personnel and departments, students and the community as well as outside agencies including but not limited to the IUC, the Higher Education Compact of Greater Cleveland and NOCHE. We also conduct surveys and respond to external surveys which allow benchmarking.

Survey Completion
Internal Surveys - At the end of each semester IR surveys our graduating students to learn their first destinations after leaving The University of Akron. In addition to providing outcomes for individual classes, the First-Destination Survey is designed to provide trends data over time to inform the discussion about the value of higher education. A follow-up survey is conducted six months after graduation for those not responding or not placed at the time of the First Destination Survey. Career Services is our critical partner in this endeavor.

External Surveys – IR completes several external surveys on behalf of the University including, but not limited to: The Common Data Set, ACT Institutional Data Questionnaire, The College Board, Open Doors International Student Census Survey, Peterson’s Annual Survey of Undergraduate Institutions, Peterson’s Annual Survey of Graduate Institutions, Peterson’s Annual Financial Aid Survey, U.S. News Main Survey, U.S. News Finance Survey, U.S. News Financial Aid Surveys, and the Wintergreen Orchard House Online Questionnaire. We partner with a number of departments across campus to provide information for these surveys.

University Initiatives
- Economic Impact Study
- Academic Program Review
- Faculty Salary Market Compression Study
- Enrollment Projections
- University Dashboards
- State Share of Instruction Review/Analysis

Routine Reports and Ad-hoc data requests (examples)
- Weekly admissions and enrollment reporting
- Financial Aid Summary
- Higher Education Compact of Greater Cleveland
- Student Right To Know
- Retention and Graduation Reports
- Choose Ohio First
- National Student Clearinghouse Tracking

As the need to have more specialized data to inform decision making and planning has continued to develop, IR is being approached more frequently for data prior to publication or dissemination to the public and a broader range of the campus community is seeking information to improve or validate their programs. These services are confirmation that IR products are widely used across UA and that IR is depended on for a broad range of decision support, monitoring, and mandatory reporting.

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c. Resources

**Personnel** – The office of IR currently consists of three FTEs: Assistant Director, Senior BI Analyst, and Senior IR Associate. Until this upcoming academic year, there was also one graduate assistant whose function was to assist with computer programming needs. There will be no graduate assistant in the coming academic year so this function will be absorbed by the employees within the department.

- Assistant Director (1 FTE) – Primary function is to provide oversight of department and decision-support for university initiatives. This position also serves as the HEI Liaison for the University and is primarily responsible for the submission of all HEI data files.
- Business Analyst Senior (1 FTE) – Primary functions are the design, development, and deployment of institutional data from university systems. This position also serves as the liaison to the IT department and campus communities to provide business intelligence solutions.
- IR Associate Senior (1 FTE) – Primary functions are to analyze data and provide critical support to core and ad hoc research activities (i.e., surveys, studies, enrollment reports, etc.).

Although the number of staff members employed in the unit is adequate for current functions, the number is not ideal. Ohio’s four-year public institutions have an average of 6 professionals hired for this area. An additional administrator who could focus on analytic studies for the university and share the job duties would be a definite plus.
Financials - The line-item summary of Institutional Research’s budgeted and actual expenses over the past 5 years were as follows:

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<th>Budgeted</th>
<th>2014</th>
<th>2015</th>
<th>2016</th>
<th>2017</th>
<th>2018</th>
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<tr>
<td>Administration</td>
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<td>-</td>
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<tr>
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The actual expenses for IR have fallen to 61% of the 2015 budgeted expenses. The employees in this department have made a very conscientious effort to reduce expenses by nearly eliminating travel/hospitality and supplies/services expenses. The increase in supplies and expenses for 2018 can be attributed to moving the offices down two floors in Leigh Hall.

Equipment and technology - Institutional Research relies heavily up-to-date computers and reporting tools to extract institutional data. These tools include Hyperion, Oracle
Analytics Cloud, and Tableau. SharePoint, DOTCMS and web applications are essential to share information with internal and external data consumers.

Space – The office moved to the third floor of Leigh Hall one year ago. Due to a lack of space in the new office, one staff member currently occupies an office within the Graduate School. Staff being separated has posed some challenges and being co-located would be the ideal situation. As the staff grows and the operational needs of the office increase, the current space will soon be outgrown.

II. Future Plans
   a. Potential changes

Recent changes in available technology including the ongoing transition from Hyperion, our current reporting software, to Oracle Analytics has provided new opportunities for IR. With the help of IT, IR is now in a position to harness this technology to increase production, maintain quality and achieve greater effectiveness.

On the horizon for IR personnel, it is likely there will be a retirement in the next couple of years. The traditional learning curve for Institutional Research is at least one year so an additional IR Associate should hired within the next year.

b. Trends

The most noticeable trend in IR has been the reduction of staff over the past 10 years. In 2008, the office was fully staffed with six full-time administrators, one half-time administrator (shared with IT to provided dedicated technology support) and three graduate assistants. By 2013, the staff was reduced to three full-time administrators and one graduate assistant. At this time it was determined the IR staff was severely understaffed and two additional hires were added. Today, we down to three administrators and no graduate assistants.

Throughout the history of the institution, there has been a steady growth of new programs, changes in degree names and majors, shifting of programs, departments and colleges, and the addition of new departments, schools and colleges within the university. These changes, while important to the institution, make the tracking of a unit’s growth and change difficult for trending purposes.

IR has been running hard and yet are still falling behind, deluged by demands for data collection and report writing that blots out time and attention for deeper research, analysis and communication. We are in the early stages of updating and automating new files and reports that will allow us to spend less time querying and massaging the data to fit reporting requirements. This will also allow additional time for cross-training in the reporting function – particularly lacking in state (HEI) reporting.

The field of institutional research has been moving away from the traditional top-down structure in order to be more flexible and able to respond more quickly to university needs. In the federated model, IR works in conjunction with other departments to
produce an organization-wide IR function. Ideally, this model would activate a network
of individuals across campus that are aligned with the strategic, tactical and operation
decisions of major areas.

Following this trend, IR has begun the process of establishing and supporting a network
of data users and consumers to share good practices and collectively advocate for the
data, tools and dissemination methods required to meet UA’s needs. In order for this
model to be successful, the university will need to commit to training and continuing
professional development of data-related skills for all associated employees. Once
implemented fully, the university will have the tools for an appropriate level of data
literacy for decision-support roles that already exist here at UA.