

A System to Streamline External Reporting in IR Offices

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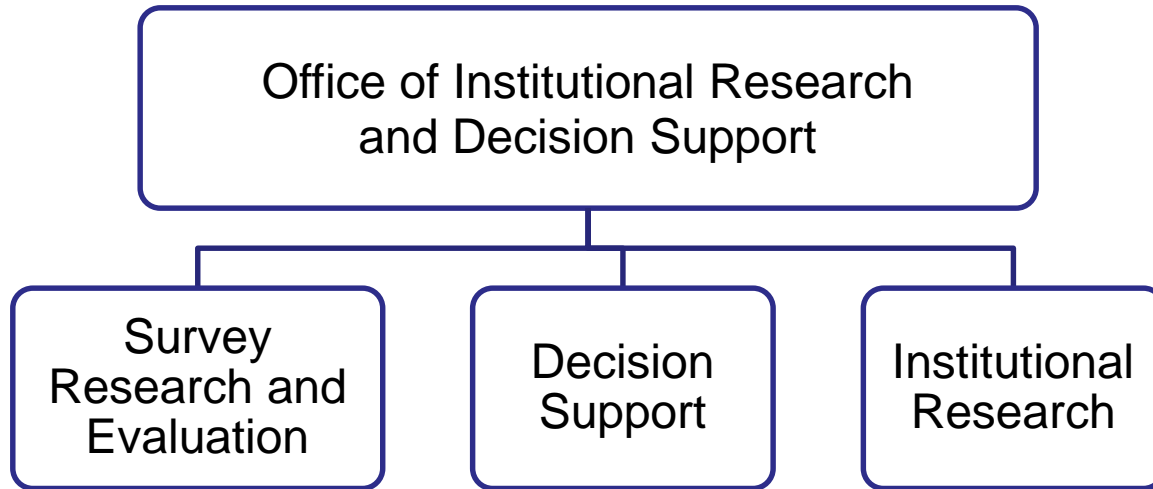
Loyola Marymount University – Who We Are

- ❑ Located in Los Angeles
- ❑ Private/not-for-profit/4-year university
- ❑ Catholic university – Jesuit & Marymount traditions
- ❑ 3,000+ graduate students
- ❑ 6,000+ undergraduate students

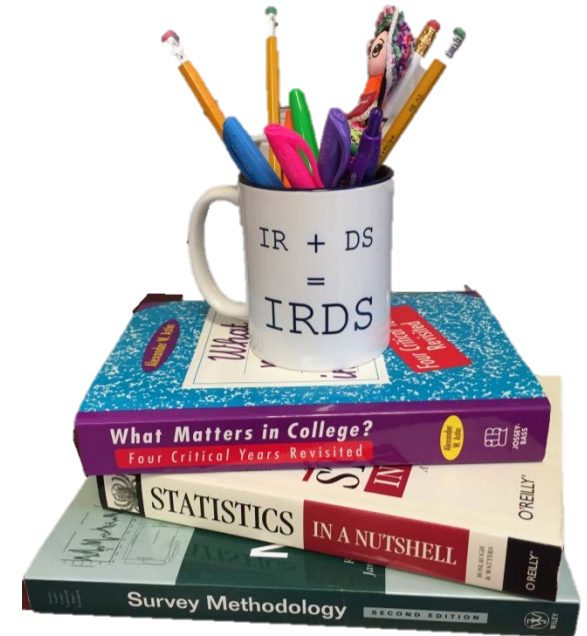


Mission: The encouragement of learning, the education of the whole person, the service of faith, and the promotion of justice

Loyola Marymount University – Who We Are



- ❑ Within Academic Affairs
- ❑ Newly reorganized
- ❑ Seven full-time staff
 - ❑ 3 FTE



- ❑ Benefits to and Burden of External Survey Reporting
 - Audience Polls

- ❑ Why Streamline External Reporting

- ❑ Project Goals

- ❑ Project Implementation

- ❑ Limitations

Benefits of External Survey Reporting

- ❑ Reputation & Branding
- ❑ Student Recruitment
- ❑ Transparency & Accountability
- ❑ Benchmarking

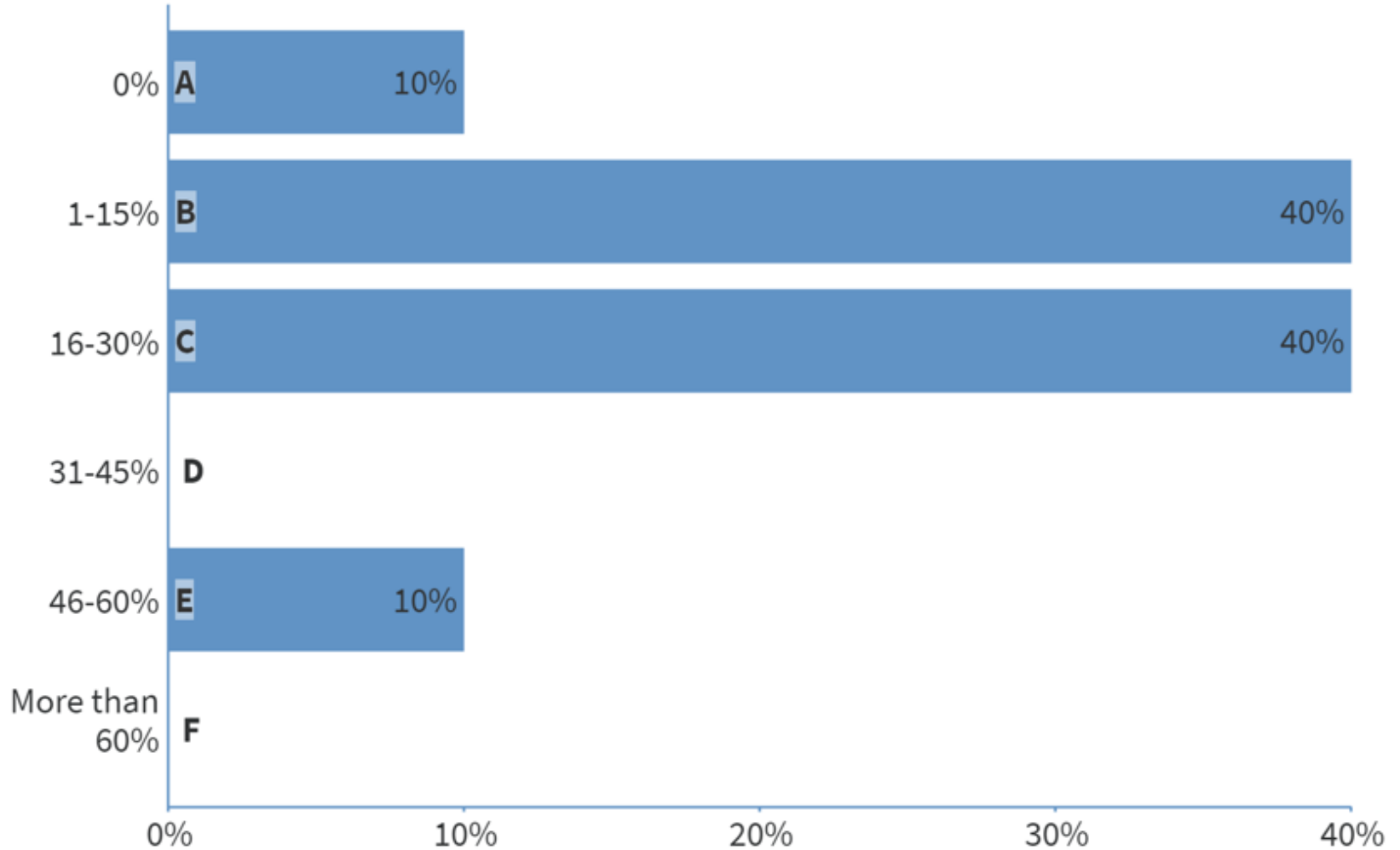
Burden of External Reporting: Time

Time Commitment

- ❑ Time spent on external reporting for guidebooks and rankings
- ❑ Number of surveys for which IR bears primary responsibility

In the last academic year, about what percentage of your total office project hours were devoted to completing external surveys used for guidebooks and rankings?

Respond at [PollEv.com/irdsirds245](https://www.poll Everywhere.com/irdsirds245) Text IRDSIRDS245 to 22333 once to join, then A, B, C, D, E...



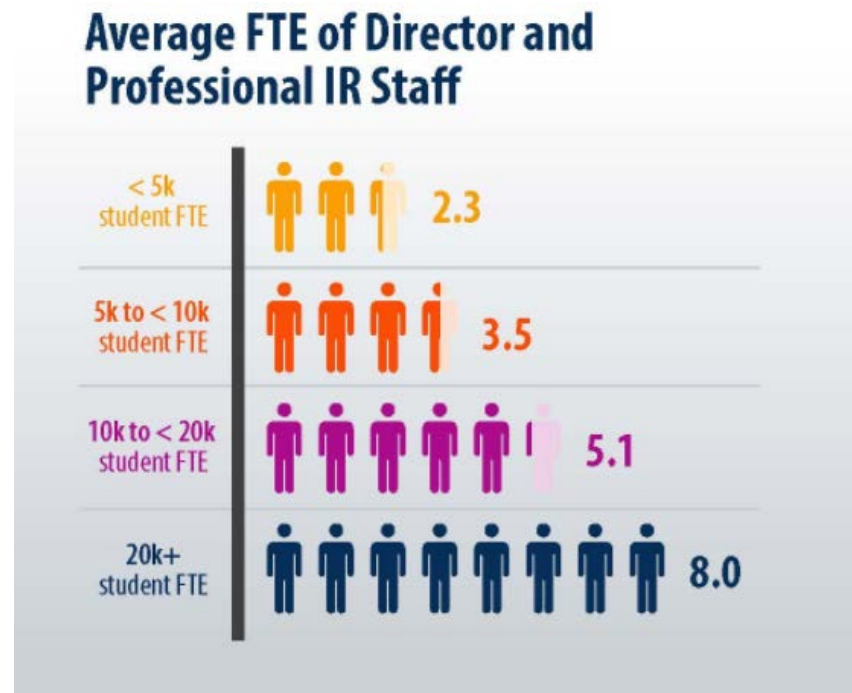
Burden of External Reporting: Time

Time Commitment

- ❑ Time spent on external reporting for guidebooks and rankings
- ❑ Number of surveys for which IR bears primary responsibility
- ❑ Product differentiation
- ❑ Less time to address internal needs

Burden of External Reporting: Resources

- IR offices have limited resources



Source: 2015 National Survey of Institutional Research Offices, Association of Institutional Research

Why Streamline External Reporting?

Efficiency

Consistency in reporting

Project Goals

1. Develop best practices for prioritizing surveys and survey items

2. Improve efficiency of all external survey reporting

Project Implementation: Survey Prioritization

Phase 1

Identify surveys that provide the most value to the institution



Project Implementation: Survey Prioritization

☐ Track hours

	A	B	C	D	E	F	G	H	I	M	N	O	P
1	Month	Hours Spent				Type	Purpose	Request Log Code	Request Description	IR Project Lead			
2		L1	L2	L3	L4					L1	L2	L3	L4
3													
46	SEPT	0.5				EXT	COM	IPEDS	IPEDS IC Header [Fall]	CC			
47		20.0	1.0			EXT	COM	IPEDS	IPEDS 12 Month Enrollment [Fall]	SY	SB		
48		12.0	1.0			EXT	COM	IPEDS	IPEDS Completions [Fall]	SB	CC		
49		8.0	1.0			EXT	COM	IPEDS	IPEDS Institutional Characteristics [Fall]	KH	CC		
50		2.0				INT	PLN	CNTL	SAT and GPA Comparators	CC			
51		1.0				EXT	PLN	BADM	MBA Historical Enrollments	SY			
52		9.0				EXT	GRA	UR	Aid to African American Undergrads	SY			
53		2.0				EXT	MRK	UR	Veteran Counts	CC			
54		10.0				INT	PLN	BCLA	PSYC Major Switching	KH			
55		36.0				INT	PLN	BCLA	SOC APRC Mid-Cycle Report	SY			
56		2.0	1.0			INT	PLN	BCLA	Faculty Diversity Data	SB	CC		

Project Implementation: Survey Prioritization

- ❑ Track hours
- ❑ Categorize external survey reporting
 1. Mandated/Nonnegotiable “optional”
 2. Negotiable optional
- ❑ Identify how survey information is used

Project Implementation: Stakeholder Feedback

- ❑ Engage with other units to prioritize the surveys IR identifies as 'negotiable optional'
 - Engage units with the largest stake in guidebooks and rankings
 - Varies by institution



Project Implementation: Stakeholder Feedback

Meeting Objectives

- ❑ Prioritize 'negotiable optional' surveys from highest to lowest in terms of value to the institution
- ❑ Identify acceptable strategies to lessen external survey reporting burden of lower priority surveys

Project Implementation: Stakeholder Feedback

Meeting Planning and Execution

- ❑ Know your audience

- ❑ Do your research
 - Prepare a list of 'negotiable optional' surveys
 - Order from largest to smallest workload
 - Include how the survey information is used

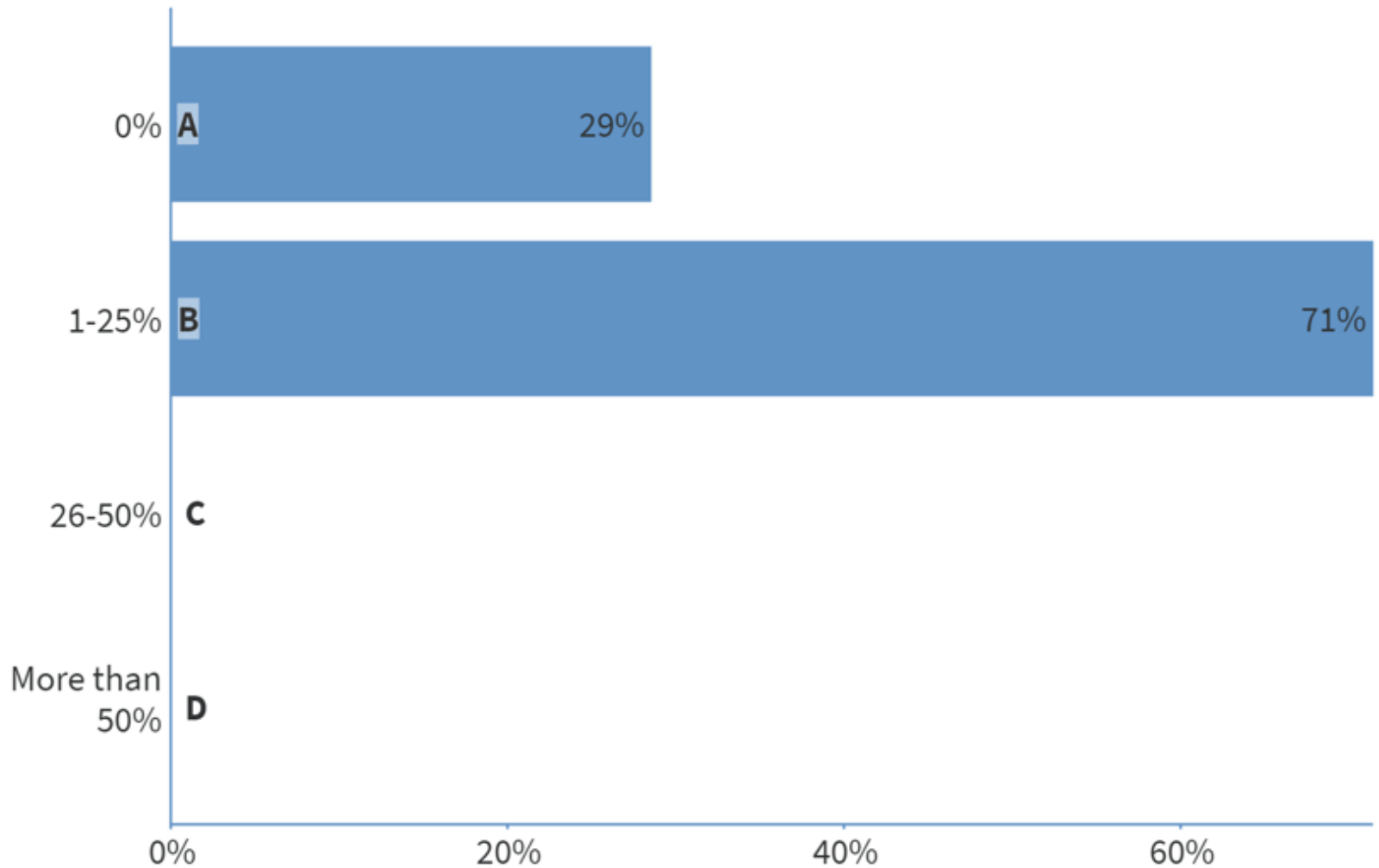
Project Implementation: Stakeholder Feedback

Key Outcomes

- Knowledge sharing
- Agreement on survey priorities and alternative strategies

In the last academic year, about what percentage of your external survey submissions reported CDS items only?

Respond at [PollEv.com/irdsirds245](https://poll-ev.com/irdsirds245) Text IRDSIRDS245 to 22333 once to join, then A, B, C, or D



Project Implementation: Consistency & Efficiency

Phase 2

Improve the efficiency of all external survey reporting

Project Implementation: Consistency & Efficiency

Step 1

- ❑ Identify where there is overlap in items asked across surveys
 - Create a spreadsheet with this information

Example: List of Surveys

- Create a chronological list of surveys answered each year

	A	B	C
1	Number	Survey	Due
2	1	1. IPEDS - Institutional Characteristics	Mid-October
3	2	2. IPEDS - 12 Month Enrollment	Mid-October
4	3	3. IPEDS - Completions	Mid-October
5	4	4. Moody's Student Demand	Late-October
6	5	5. Moody's Supplemental Worksheet	Late-October
7	6	6. Barron's - Profiles of American Colleges	Mid-November
8	7	7. LMU Fact Card	November-ish
9	8	8. NACUBO - Tuition Discounting Survey	Late-November
10	9	9. Common Data Set (CDS)	Late-November/Early-December
11	10	10. AICCU - Financial Aid	Early-December
12	11	11. College Board	Late-January
13	12	12. UCAN	February
14	13	13. Princeton Review	Early-February
15	14	14. IPEDS - Student Financial Aid	Mid-February
16	15	15. IPEDS - 200% Graduation Rates	Mid-February

Example: Identify Survey Overlap

Identify survey item overlap

Survey questions

Identify the first place an item is answered

Identify all surveys on which the item appears

	A	B	G	H	I	J	K	L
1	Question	First answered on:	5. Moody's Supplemental Worksheet	6. Barron's - Profiles of American Colleges	7. LMU Fact Card	8. NACUBO - Tuition Discounting Survey	9. Common Data Set (CDS)	10. AICCU - Financial Aid
2	27. Percentage of undergraduates from: <ul style="list-style-type: none"> • in-state • out-of-state 	6. Barron's - Profiles of American Colleges		27. Percentage of undergraduates from: <ul style="list-style-type: none"> - in state - out of state 	Residency of Undergraduate Degree-seeking Students (Excludes International): <ul style="list-style-type: none"> - California Students - Out of State 		Table F1. Percent who are from out of state (exclude international/nonresident aliens from the numerator and denominator)	

Project Implementation: Consistency & Efficiency

Step 2

- ❑ Build a process to generate quantitative answers one time and output to other survey folders automatically
- ❑ Develop best practices for the process

Example: Imported Results Script

- Update scripts to output data to the appropriate survey folders

```
/* Export Percent undergraduates living on campus (Undergraduates):
   Fiske (29) */
use `f1`, clear;

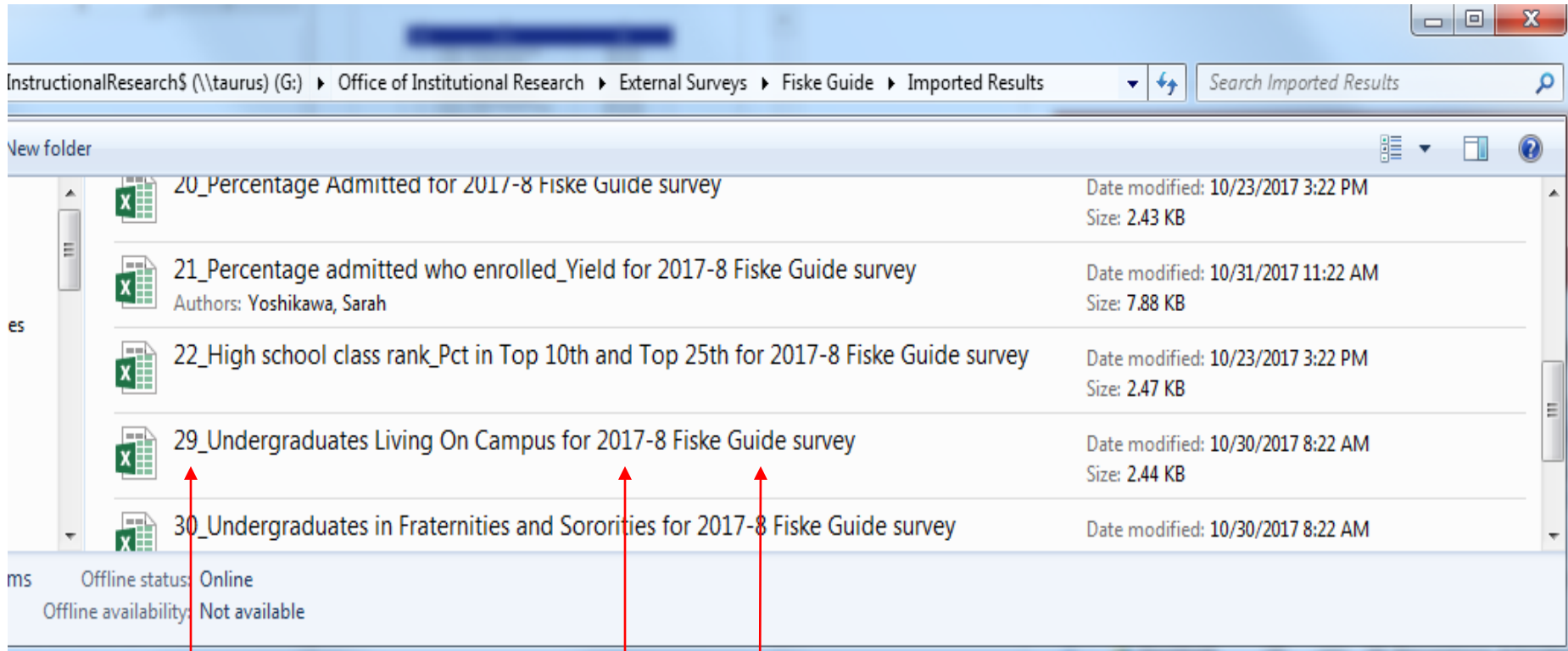
drop Freshmen;
keep if inlist(desc, "", "OnCampus");

replace item="Percent undergraduates living on campus" if desc!="";
export excel using "${export}`FISKE`/Imported Results/29_Undergraduates Living On Campus for `year` `FISKE` survey.xlsx", firstrow(variables) replace;

replace item="Item was exported to: `FISKE` 29" if item=="`export_note`- Question F1";
export excel using "${pfolder}_Exported Results/CDS_F1_Undergraduates Living On Campus `year`.xlsx", firstrow(variables) replace; //Results saved to originating survey folder
```

Example: Imported Results File Folder

- Files automatically save to survey folders



Question #

Year Survey

Example: Imported Results File

- Data clearly presented in files

	A	B	C	D
1	item	Degree-seeking Undergrads		
2	Percent of degree-seeking undergraduates living on campus	0.526769996		
3				
4	Source Code: CDS 2017-8 - Question F1			
5				

Clearly state the question and define the population →

Always identify the source code

Project Implementation: Consistency & Efficiency

Step 3

- ❑ Gather non-calculated information during the summer
 - Undergraduate/graduate assistants can provide a more affordable option for this task
- ❑ Put this information into a master spreadsheet to be referenced throughout the year

Example: Master Spreadsheet

Identify the question category

State the question

Report the answer

Each survey is assigned a column

	A	B	C	D	I	J	K	L	M	N	O
1	Category	Question	2017-8 Answer	First Answered On:	5. Moody's Supplemental Worksheet	6. Barron's - Profiles of American Colleges	7. LMU Fact Card	8. NACUBO - Tuition Discounting Survey	9. Common Data Set (CDS)	10. AICCU - Financial Aid	11. College Board
2	Student Life	Number of clubs/organizations	178	6. Barron's - Profiles of American Colleges		Activities; 52	x				Student Life; F4.3

Limitations of the System

- ❑ Cost of implementation
- ❑ Requires buy-in
 - Within office and by key stakeholders
- ❑ New questions or changes to survey questions

- ❑ Powers, K., & Henderson, A. E. (Eds.). (2016). Burden or benefit: External data reporting [Special issue]. *New Directions for Institutional Research*, 166, 1-120.

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