Office of Institutional Research, Planning & Analysis
Strategic Plan Goals, Objectives, Measures, and Outcomes: FY 2011

Goal 1: **Enhance information-driven decision-making by providing data that are accessible, accurate, consistent, relevant, reliable, and timely**

Objective 1.1: Continue to provide student information so that reasonable service levels are maintained and customer service is not negatively impacted (as a result of the ISIS transition).

Measurement 1.1: Customers report (via the online OIRPA Annual Customer Satisfaction Survey) 90% agreement (excluding NA responses) with the statement "The OIRPA staff members were responsive to your needs." CHRISTINE

Launched Customer Satisfaction Survey on 5/1/2011.

100% agreed with the statement "The OIRPA staff members were responsive to your needs." (6/21/2011)

Objective 1.2: Ensure that the website pages are useful to customers.

Measurement 1.2.1: Based upon the website hit counter data, the website pages in the lowest quartile (of number of hits) will be evaluated by the staff for potential improvements/elimination. JEFF/**PAULA**

2/17/2011: Google Analytics downloads were merged with SWAE request tracking statistics in the Data Warehouse; Paula and Jeff reviewed statistics at the end of each quarter and made recommendations to Christine.

- Link to UCD Strategic Plan: *Objective 2.6.2*

Measurement 1.2.2: Based upon the website hit counter data, the reports (from the Report Library) in the lowest quartile (of number of hits) will be evaluated by the staff for potential improvements/elimination. JEFF/**PAULA**

2/17/2011: SWAE request tracking statistics were compiled in the Data Warehouse; Paula and Jeff reviewed statistics at the end of each quarter and made recommendations to Christine.

- Link to UCD Strategic Plan: *Objective 2.6.2*

Objective 1.3: Ensure that the information we provide to our customers is timely.

Measurement 1.3.1: Develop new "on time" reports from Project Tracker to facilitate identification of potential issues. **CHRISTINE/**JEFF

6/28/2011: Jeff published draft reports for Christine's review; 7/11/2011: Report finalized and published to R&D site.

- Link to UCD Strategic Plan: *Objectives 2.6.2, 7.3.2*

Measurement 1.3.2: Create "Comment On This Page" links on all website pages, and analyze feedback to facilitate identification of potential issues. JEFF/**PAULA**

6/25/2011: Feedback ASPX page was finalized and published. Links added to public-facing ASPX pages. SharePoint page links cannot be easily created; therefore a new project will be established to create links on all pages.

Objective 1.4: OIRPA provides reports that are easy to interpret (by the customer).

Measurement 1.4.1: Customers report 90% agreement with the annual assessment instrument item: "The reports were easy to interpret." CHRISTINE

Customer Satisfaction Survey launched on 5/1/2011.

95% agreed with the statement "The reports were easy to interpret." (6/21/2011)

Measurement 1.4.2: Additional analyses of survey data to examine responses by type of requestor, reports on website vs. information for a specific request.

Added survey item on 10/6/2010: Your responses to this survey reflect:

A specific request you made via the online request form	9
A specific request you made, not using the online request form	7
Several requests you made via the online request form	5
Several requests you made, not using the online request form	16
General interaction with the Office of Institutional Research, Planning and Analysis	40

Analyses performed on 6/30/2011 revealed that the distribution of responses (see above) limited the ability to draw significant conclusions from the data.

Measurement 1.4.3: Assess via the customer survey the degree to which interpretation has been provided to customers.

On October 5, 2010, an item was added to the Customer Satisfaction Survey: "The IR staff provided you with the appropriate amount of interpretation of the requested information."

98% agreed with the statement "The IR staff provided you with the appropriate amount of interpretation of the requested information." (6/21/2011)

- Link to UCD Strategic Plan: *Objectives 2.6.2, 7.3.2*

Goal 2: **Provide accurate and timely data regarding faculty and staff to decision makers**

Objective 2.1: Increase accessibility and versatility of the existing faculty/staff report.

Measurement 2.1.1: Provide various breakdowns of faculty and staff headcounts at the college/school level and make them available online by September 30, 2010. **BILL/**NATHAN

College-level reports were going to be developed in SSRS. However, it's been decided that all SSRS reports should be based on a standard template. That template is still being developed, so until it's finished, this measurement is on hold. (See project 20110043 for more information).

Measurement 2.1.2: Develop integrated datasets to facilitate data analyses by June 30th, 2011. **NATHAN**/BILL

New fields were added to the annual fall snapshot. In addition, spring and summer snapshots are created. SSRS have been created to facilitate reporting. However, it's becoming clear that our and the institution's data needs are evolving, and the introduction of new variables or data sets often reveals the need for additional variables or datasets. Therefore, this will remain an ongoing process.

- Link to UCD Strategic Plan: *Objective 5.2.2*

Goal 3: **Provide student retention and graduation rate data to decision makers**

Objective 3.1: Provide training to IR staff on the strategies to extract and provide data regarding student retention and graduation.

Measurement 3.1.1: Training for grad/retention data will be provided to IR staff. GARY

Throughout the year many additions/enhancements were made to the base cohort and retention datasets. Based on SSRS report design, the decision was also made to combine standard and transfer retention populations into a single master dataset. Because of those issues and additional delays caused by ISIS implementation for fall 2010, at the April 2010 staff meeting it was decided that this goal will be carried over to 2012.

Measurement 3.1.2: Expanded datasets will be made available to staff by July 30, 2011. GARY

Initial discussions regarding this addition and the need for these data for other projects led to the decision to make this a more comprehensive National Student Clearinghouse data goal to be carried over to 2012. The primary purpose of that goal will be to standardize Clearinghouse data acquisition and usage and will include a sub-goal of including that data in retention reporting.

Objective 3.2: Add subsequent enrollment data to existing reports as well as data breakdowns for other populations (grad level); add fall-to-spring retention data to reports that are posted online.

Measurement 3.2.1: Reports will be designed and published. GARY

Some revisions will be required based on templates and structure/contents of source datasets but basic design of retention reports is complete. Final details of report development and publication are carried over to 2012.

Measurement 3.2.2: Subsequent enrollment info (using clearinghouse data) will be added to GRS tables. GARY

Carry over to 2012 – see comments for Objective 3.2

- Link to UCD Strategic Plan: *Objective 2.2.4*

Goal 4: **Assess the student experience and identify areas for improvement and of excellence**

Objective 4.1: Disseminate NSSE results to campus constituencies.

Measurement 4.1.1: By April 1, 2011, overview of NSSE results provided to AD/ASG, UWG, Survey Working Group. CHRISTINE

Emailed overview to Survey Working Group on 9/11/2010
Provided overview at AD/ASG on 9/21/2010
Tammy Stone emailed overview to UWG on 10/6/2010
Note: Kimberly Thompson assumed responsibility for all surveys on December 17.2010.

Measurement 4.1.2: By April 1, 2011, NSSE results overview posted to IR website. CHRISTINE

Posted by 10/6/2010:
Note: Kimberly Thompson assumed responsibility for all surveys on December 17, 2010.

Objective 4.2: Disseminate 2010 alumni survey results to campus constituencies.

Measurement 4.2.1: By April 1, 2011, overview of the alumni survey results provided to AD/ASG, UWG, Survey Working Group, IRAG. CHRISTINE

High-level results from the three survey versions shared with Alumni Relations (Julie Mullin) on October 9, 2010.
Note: Kimberly Thompson assumed responsibility for all surveys on December 17, 2010. Alumni data emailed to her December 27, 2010.

Measurement 4.2.2: By April 1, 2011, alumni survey results overview posted to IR website. CHRISTINE

Cancelled: Kimberly Thompson assumed responsibility for all surveys on December 17, 2010.

- Link to UCD Strategic Plan: *Objective 2.9.4*

Goal 5: **Ensure the best possible communication and interactions with those who use university data**

Objective 5.1: Enhance the IR website to provide information about our services

Measurement 5.1: Add the following elements to the IR website by June 30, 2011:

1. Measurement 5.1.1 - Committee listing JEFF

   Committee listing tables / website completed and published on 10/11/10.

2. Measurement 5.1.2 - New website page for Consulting Services NATHAN/CHRISTINE
   MS-Word and PDF created in 10/2010; posted to website on 10/14/10.

3. Measurement 5.1.3 - New to UCD webpage (e.g., materials for HR new employee orientation, "NEO") MINDY/Jeff
   Met on 10/19 and decided that packet of materials would include one page "business card" – designed by Nathan, an example of data we provide – general summary from enrollment report and contact information for our department that details the area of focus for each of us. Need to set-up meeting with HR and discuss getting materials into HR NEO packets and presenting them.

4. Measurement 5.1.4 - User Guide for new IR employees MINDY
   Discussed during 10/19 meeting and working towards completing.

5. Measurement 5.1.5 – Further categorization of reports, category descriptions PAULA/NATHAN
   Definitions added to report library on September 16, 2010.

6. Measurement 5.1.6 - Context, descriptions (hover over) JEFF / Report Developers
   Enhanced Report Library data table and ASPX page completed and published on 9/20/10.

7. Measurement 5.1.7 - Definitions, terminology clarifications(data dictionary, glossary) JEFF /Report Developers
   Glossary web page published on 3/1/2011. All IR Staff have access to add information to the data table that sources this page.

8. Measurement 5.1.8 - Nomenclature consistency: e.g., enrollment vs. headcount DAVE/Report Developers

   On 6/27/2011 additional enrollment report documentation was added as part of the ISIS transition that helps explain key concepts. Additional work on *ad hoc* reporting consistency is ongoing. An assessment still needs to be performed to determine if centralized documentation for report developers is needed to facilitate this consistency.

   Over this past year, a concerted effort has been made to move to using IPEDS definitions and counts wherever possible. We have moved from a business model that questioned requestors' definitions for the term 'faculty' to a model that uses all employees reported in the IPEDS EAP section in rows 1, 3 and 4 as the default and only deviating from this definition when there is a clearly stated reason to do so.

9. Measurement 5.1.9 - IPEDS HR definitions NATHAN/BILL
   Included in Report Library by August 30, 2010

10. Measurement 5.1.10 - Disclaimer for usage/offer to review data for institutional publications, etc. CHRISTINE
    Posted to website by October 1, 2010.

11. Measurement 5.1.11 - Explain the data that IR does and does not have DAVE
    Completed on 6/27/10 as part of the summary document on IR's services.

Objective 5.2: Augment the IR standard reports so that they are more easily interpreted

Measurement 5.2.1: Redesign IR standard reports, by 6/30/2011, to add source citations to facilitate identification (add citation to reports/website to say, this is how you cite this source) **PAULA**/CHRISTINE

Paula, Dave and Christine met on 5/6/11 to discuss citation format. At minimum it will include project ID, report output file name, highest level parameters/selection criteria.

See P:\2010\20100245_StrategicPlanFY2011Measurements\IR Standard Report Example.docx for an example of the format.

Measurement 5.2.2: Redesign IR standard reports, by 6/30/2011, so that, for those reports that change over time, add information into report headers, explanations in notes/footer (of what the change means to the report user/customer) **DAVE**/Report Developers

As of 6/27/11, many footnotes have been added to the DC and AMC enrollment reports, particularly with the ISIS change, for definition changes and corrections over time. Other standard student reports have not needed significant additions, but will continue to be evaluated.

The publication of existing SSRS reports and design of new college-level reports is on hold until we have a uniform SSRS template. Also, some of the data fields in the snapshot will be going away this year, and others will have information for prior years added in. With all of these changes, a more complete timeline can be developed and used to create time-appropriate headers and footers.

- Will need to decide if older reports get rerun

Objective 5.3: Make the IR website more visually appealing and directive.

Measurement 5.3.1: Redesigning the Homepage to include more bold buttons and less text, and simplifying the navigation structure. **JEFF** / PAULA

Homepage redesigned and published on 9/2010; left-hand navigation menu cleaned up 10/14/10.

Measurement 5.3.2: Revamp customer Satisfaction Survey to include item about ease of use of website, then evaluate responses. CHRISTINE

Launched Customer Satisfaction Survey on 5/1/2011.

Item added to survey on 10/6/2010: "The IR website is easy to navigate and use."
89% Agreed with the statement "The IR website is easy to navigate and use." (6/21/2011)

Objective 5.4: Develop improved customer communication strategies

Measurement 5.4.1: Develop a checklist of topics to discuss with customers when they make a request. **MINDY**/PAULA/ CHRISTINE

Group met on 1/3/2011 and reviewed the form. Christine had made several suggestions that Mindy and Paula reviewed. They also added several ideas to the form as well. Form was presented to the rest of the group at the next check-in meeting for the strategic plan.

Measurement 5.4.2: Develop a one-page "business card" that provides information about who we are, what we do/provide **MINDY**

Mindy/Nathan created the document in October 2010, and Jeff posted the PDF version to the IR Website on 10/14/2010.

Measurement 5.4.3: Create a packet of materials (explaining IR) for new employee orientation **MINDY**

Met on 10/19 and decided that packet of materials would include one page business card (designed by Nathan), an example of data we provide (general summary from enrollment report), and contact information for our department that details the area of focus for each of us. Packet will be distributed to Nicole for the first time and feedback will be solicited from her regarding helpfulness of packet and additions/deletions that should be made. Need to set-up meeting with HR and discuss getting materials into HR NEO packets and presenting them.

4/28/2011 – Two page information packet in final stages of draft version. Shelly is meeting with Sam to discuss incorporating it into HR packet for new employee orientation. Goal is to have IR information included in the 1st or 3rd week 'new employee orientation.'

Measurement 5.4.4: Add customer survey item to assess effectiveness of new request form. CHRISTINE

Item added to survey on 10/6/2010: "What suggestions do you have to improve the online request form?" 6/27/2011 Results:

I just need to use it I typically just email your team
I've only used the online request system once. Usually I contact Dave or Paula with a question that spins into a request and work directly with them.
I don't typically need to request customized reports but rather have use for/need of some of the standard reports and data collections that IR produces and posts to its website.
I just need to be retrained to use the form rather than automatically calling you every time I have a request.
No suggestions.
I didn't know about the link.
nothing, it is fine as it. if there is more than what i need, the emails are posted on the website.
If a specific browser is required, call that out at the top of the form.
It's still difficult to get some information for specific programs in a timely fashion
more visually appealing
ISIS still seems to provide challenges for retrieving information quickly.
make link easier to find
Works for me.
I did not use the online request form, as my request was a first time request and was not straight forward. I contacted the Director of the office first.
Have not used it yet.
I have not used it.

Objective 5.5: Enhance Self-Service Utilities by the Publication of Data Request Form. JEFF

Measurement 5.5: Analysis of data requests received via the new form versus other methods. **PAULA**/JEFF

6/15/2011: Initial queries completed; analysis to occur every quarter after new information is updated.

Objective 5.6: Enhance Self-Service Utilities of portal

Measurement 5.6.1: Publication of "My Portal" page for Authenticated Users. JEFF

Page published 12/20/2010.

Measurement 5.6.2: Customer Satisfaction Survey responses to ease of use of "My Portal." CHRISTINE

CHRISTINE launched Customer Satisfaction Survey on 5/1/2011. However, a portal item was not added to the survey. This could be done next fiscal year, since the portal was not as relevant this year.

Measurement 5.6.3: Analysis of use of the My Portal links. JEFF

This measurement is limited to the design of the queries that will provide this information; however, due to extremely limited publication in this FY, analysis and review will occur in future periods.

6/28/2011: Queries developed, and analysis is scheduled for every quarter.

Goal 6: **We promote a culture of evidence and assessment by modeling that same approach in our own business practices**

Objective 6.1: Improve our internal tracking and accountability of the IR strategic plan objectives/measures

Measurement 6.1.1: Devote quarterly meetings to strategic plan goals/objectives. CHRISTINE

Meetings set for 10/7/2010, 1/13/2011, and 4/14/2011; meetings held as scheduled.

Measurement 6.1.2: Set up tasks/projects to track our objectives/measures, identify milestones for the objectives/measures. JEFF/CHRISTINE/ALL STAFF MEMBERS

On 10/7/2010 Christine finished adding in measures for goals 5 and 6 that had been left of the original listing in Project Tracker.

Measurement 6.1.3: For the FY12 strategic planning retreat, have a pre-retreat to set expectations, provide information about important areas in which all staff might not be knowledgeable (e.g., accreditation). CHRISTINE

Meeting set for 6/27/2011; meeting held as scheduled.