

Into the void: What happens to our reports?

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Presentation Overview

- Literature
- Background
- Research Questions
- Methods
- Findings
- Lessons Learned & Changes Made
- Discussion

Literature

- Primary function of institutional research is to provide data that informs institutional decision-making and planning
(Borden & Kezar; Delaney, 1997; Saupe, 1990)
- Barriers to effective delivery of information
 - Mismatch between what the IR office provides and what the decision-maker needs
 - Needs can vary by individuals
- “If assessment findings are not communicated effectively [for the user], the process becomes an expensive exercise in research design and data collection.”
(Volkwein, 2010, p. 162)

Previous studies examining what decision-makers desire from IR

- Walton (2005)
 - Survey of 500 administrators at institutions across the country
 - Administrators wanted information from IR that was of superior quality, relevant to a decision, available when needed, communicated in a form tailored to their needs, and presented with a clear understanding of institutional context
- Harrington et. al. (1996)
 - Survey of 250 college and university presidents regarding perceptions of IR
 - 93% relied on institutional research for information support at least sometimes
 - 96% agreed that their IR offices provided accurate data and information
 - Only 72% agreed that IR understands their information needs
- Knight (2010)
 - Qualitative study of IR practitioners nominated by colleagues as particularly effective in terms of impacting institutional decision-making
 - Successful IR practitioners shared a common perspective on several themes, including an emphasis on understanding institutional context, actively helping leaders make meaning of IR findings, and being proactive. Several informants emphasized that IR practitioners benefit from “developing...responses according to what [particular administrators] best need” (p. 6).

Current Study: Rationale

- We send out hundreds of reports every year and receive very little feedback
 - Feels as if reports are being sent into a void
- Unclear whether clients review reports, or act upon data
- Unclear what our clients desire from us
- We have ideas for changes in reporting practices; need feedback on whether it is worthwhile to move forward with these

Background: Tufts OIRE

- Tufts' Office of Institutional Research & Evaluation (OIRE)
 - Eight primary staff members: Director, two Associate Directors, four research analysts and Coordinator
 - Two primary activities
 - Work with clients across the institution to collect desired information
 - Collect information to serve the institution as a whole
 - Much of our work involves survey research
 - We also access institutional databases such as the student information system and faculty files
 - We serve all of Tufts' schools and campuses; gather data on students, faculty, staff, alumni, employers

Research Questions

1. Have our clients reviewed the data/reports we have given them? Do they understand the information contained therein?
2. How, if at all, have the information/reports been used in decision-making?
3. How do respondents feel about our current reporting mechanisms?
 - Is the current distribution process for information/reports—e-mail—the most optimal, or would an alternative method, such as an online report portal, be more effective?
 - Is the format of our reports (primarily PDFs) useful, or would another format (such as an interactive data display) be preferable?

Methodology/Data

- 21 interviews with 28 faculty members, administrators & staff from Tufts' three campuses over Summer 2012
 - Included: admissions directors, school-level deans, department chairs, directors of campus services, faculty members and other staff members who:
 - Received data and/or reports from OIRE during academic year 2011-2012
 - Hold organizational positions within which it is possible to use data to make decisions about how a particular area functions
- Interviews were transcribed and analyzed for common themes

Findings: Three primary themes

- Data usage
- Reports: distribution, format & content
- Perceptions of OIRE

Data Usage

- People report that they review documents we send them
- Many examples of how data were used
- Different “types” of data users
 - Data monitors – tend to be “higher-level” administrators who receive reports from major surveys or other campus data sources (but did not necessarily request these)
 - Active users – tend to be clients who have contracted with us for a specific project or initiative
 - Outcomes Assessors – Outcomes Assessment Committee members who meet regularly and have standing agenda items to review data

Data Usage: Specific Actions Taken

- New campus center at vet school
- Library: new study space, more outlets, late night hours
- New training programs for graduate TAs
- Curriculum changes
 - First-year engineering students
 - Graduate courses
- Campus Safety escort program

Data Usage: Specific Actions

- Typically, IR data supported decision-making but were not the only source of evidence
 - *It's not that we didn't know about [the issue] and the exit survey alerted us to it, but it affirmed [what we had already heard] with some hard data - this is something that really is real.*
 - Faculty member talking about a curriculum change
 - *It's rarely the case that solely a data point drives decision...it is just part of the process of creating a constituency...data do help but they are by no means the sole drivers...of decision making in any place.*
 - Academic dean, talking about using data for decision-making
 - *A lot of times the information reconfirms what we already know but it is also helpful to have... solid data that rather just speculating what we know have something to back it up, so that's really useful.*
 - Admissions Director

Data Usage: Data Monitors

- Higher-level administrators who did not specifically request reports tended to use reports to monitor the state of affairs
- Those using survey data as surveillance tools tend to not look at data as in-depth
 - *So from my personal view, the information is useful and helpful but informative much more than anything else; it just lets me know where things stand, for me.*
 - Associate dean, talking about pre-major advising data
 - *I see working with you guys a lot of the times as working surveillance, I just want to know which way the wind is blowing.*
 - Director of a student service area, talking about how he uses survey results

Data Usage: Data Monitors

- Some administrators had specific areas they were particularly interested in, and they paid closer attention to these areas
 - *So in my old role I would always check the retention report, every year as soon as it came. ...I am continually monitoring that even now that I am in this role and retention is not in my portfolio anymore.*
 - Dean of faculty affairs, former dean of student affairs
 - *Because I work in student affairs, I'm most interested and involved with the entering survey and exiting survey....those are the results that I mostly really await. When we have our meetings and discuss the instrument before it goes out and the results, those two tend to be the ones that I'm most involved with.*
 - Dean of student affairs
 - *My research area is the impact of service on engineering education, so this community engagement aspect [of the senior survey] is of interest to me.*
 - Associate Dean

Data Usage: Active Users

- When surveys are created for particular purposes—to probe a specific area—clients tend to use the data more actively
 - *In the past...we've done surveys for the sake of saying we did surveys. And I have really sought to avoid that, with the surveys that we've designed...I've tried to fashion questions to get at problems that we want to solve, but we need information to solve those problems...when you're really trying to make administrative decisions about service delivery, I mean, make a budget decision, you need actionable data.*
 - Director of a campus service area
 - *[The] User Satisfaction Survey that we do every other year, we always identify action items in that. ...we [ask specific questions and] use the data to make a case with the administration, so we're able to say this is what we found out, the students want this. If we have data, the administration, many times, will act upon it- so it helps to have that data.*
 - Director of a campus service area

Data Usage: Outcomes Assessment

- Several schools and departments had robust outcomes assessment committees
- These committees meet regularly to review survey instruments and discuss data; discussions help spur data usage
- Some deans without robust committees feel data would be more heavily utilized if such committees existed
 - *I typically don't have a whole lot of time to really spend a lot time with [the survey results] until the meetings....I try to look at the results and sometimes have some questions to bring with me to the meeting but it's really not until the meeting where everyone's looking at them and kind of putting their heads together that we have a really productive session of going through the report results. ...it's really during the meeting time that that we hear each other's comments and it gets some good discussion going and helps...determine what action might need to be taken based on the results.*
 - Dean of student affairs, member of school-wide outcomes assessment committee
 - *I always actually find that data helps inform and start a conversation...but [without a focus] you don't just look at it. It has to somehow be connected into some kind of review process... I think the emphasis on assessment is great, but I think we [should also have] some way of bringing in a systematic review of the data, and it shouldn't just be me alone, it should be with program directors that leads to something.*
 - Dean of a graduate school without a robust outcomes assessment committee

Reports: distribution, format & content

- Report distribution
 - E-mail versus website
- Format
 - PDF versus interactive/dynamic/not static
- Content
 - Clients are satisfied with current content
 - Many, however, desire more interactivity and/or more analysis/context
 - Trends are particularly valuable

Report Distribution

- Current system of e-mailing PDFs works for all clients we interviewed
- Many—but not all—had a positive reaction towards the creation of an online report portal
 - Historical data in one place
 - See what other reports are available, and what other schools are doing
 - Convenient when there is staff turnover

Report Format

- Our main type of report is a “Survey Preview”
 - Facsimile of survey instrument with basic frequencies filled in for each question
- Additional reports that some get include trends, synopses, and “fact sheets”

Thinking About What You've Learned				
8. To what extent has your experience at Tufts contributed to your knowledge, skills, and personal development in the following areas?				
	Very little or none	Some	Quite a bit	Very much
Writing clearly and effectively	6.4%	32.3%	36.0%	25.3%
Communicating well orally	6.9%	31.5%	38.8%	22.8%
Thinking critically	2.1%	16.8%	39.3%	41.8%
Leadership skills	8.2%	28.0%	32.2%	31.7%
Understanding and using quantitative reasoning and methods	10.4%	29.4%	33.2%	27.1%
Reading or speaking a foreign language	23.7%	29.6%	23.0%	23.7%
Critical appreciation of art, music, literature, and drama	17.1%	33.1%	28.0%	21.8%
Understanding the process of science and experimentation	23.0%	33.2%	23.3%	20.5%
Creating original ideas and solutions	6.7%	31.8%	38.7%	22.7%
Constructively resolving interpersonal conflicts	13.5%	34.0%	34.4%	18.2%
Placing current problems in historical/cultural/philosophical perspective	9.9%	30.6%	32.3%	27.2%
Career- or work-related knowledge and skills	17.4%	33.4%	29.4%	19.8%
In-depth knowledge of a field or discipline	6.2%	24.8%	37.1%	31.9%
Judging the merits of arguments based on their sources, methods, and reasoning	3.9%	26.8%	40.6%	28.7%
Functioning effectively as a member of a team	6.8%	30.2%	35.9%	27.1%
Ability to learn on your own	3.0%	21.1%	37.3%	38.5%
Thinking analytically and logically	2.4%	20.7%	39.8%	37.1%
Evaluating and choosing between alternative courses of action	4.9%	31.3%	40.5%	23.2%
Relating well to people of different races, nations, and religions	8.4%	31.6%	34.8%	25.2%
Identifying moral and ethical issues	6.9%	31.7%	36.5%	24.8%
Understanding yourself: abilities, interests, limitations, personality	3.3%	19.4%	37.4%	39.9%
Functioning independently, without supervision	3.9%	22.0%	36.9%	37.1%
Planning and executing complex projects	4.9%	26.7%	38.0%	30.4%
Understanding the complexity of social problems	5.2%	27.5%	35.3%	32.0%
Synthesizing and integrating ideas and information	2.6%	26.1%	41.6%	29.7%
Evaluating the role of science and technology in society	15.5%	32.6%	31.7%	20.2%

Report format feedback

- PDFs worked fine for many, but some desired non-static reports so that they could manipulate the data
 - *As an end user I either have to rely on OIR to answer my questions in the reports, which, honestly, I can't really anticipate what my questions are going to be until I see the preliminaries...[it] would be nice to have...an Excel spreadsheet that people who were comfortable with Excel could work with.*
 - Director of a campus service area
 - *Is there a possibility...you know I would love something like, "of the students that said [X], how many of them of that group also said [Y]." I'd love to be able to pull a few of the variables and do some sort of cross-tabulation just to kind of see that kind of analysis.*
 - Dean of student services
 - *I'll look at the topline [report], but we have the capacity to actually look at the data in raw form, and without that I don't get much out of it. So for example, I would be real interested to see how financial aided students are different in community engagement than non-funded students. Those are the kind of things we'd be really interested in, but the preview doesn't tell us that. So overall we know what the student engaged in, and the topline only tells us that, and I can't really go farther than that.*
 - Researcher involved in school-wide planning

Tableau

- Many were excited about the possibilities offered by a software product called Tableau, which allows users to interact with data
 - *Now that would be a wonderful facility to have and then be able to share, and I'd probably want to see ways in which you can group programs, you know? So I could look at STEM, I could look at Humanities, I could look at Professional Master's, I could sort of be able to aggregate it up in different ways.*
 - Graduate Dean, after hearing of Tableau's ability to let her “drill down”
 - *Yeah, [that's something I'm interested in]. Because right now, we do go back to Institutional Research and ask—we have many times in the past—asked of you to separate the data for us, if...we want to look at a slice of people. If we were able to do it ourselves through this tool, that would be fantastic.*
 - Director of Admissions, after hearing description of Tableau

Report content

- Nice to have all the numbers in the preview, but many desired help analyzing data
 - Synopses, summaries, excerpts, graphs, visualizations, focused analyses
- Those who received these found them very useful
 - *Just this morning I was thinking, I wish I could see more of these things not just as percentages, 'cause now I get massive amounts of percentages ...I wish I could see this in a graphical form as a data point. ...some information gets better seen in graphic form...for most of us it's certainly faster. You lose a bit of detail, obviously, but you get this picture right away.*
 - Academic dean
 - *The only thing that would make [reading the preview] easier is, you know, if I'm looking at a Senior Exit survey, and there are 73 pages, you know, I only care about 20 of those 70 pages...if you could figure out a better way to...compartmentalize the previews, that might be helpful because then the bulk the volume isn't so intimidating.*
 - Associate Dean
 - *...a lot of times we have to put our money where our mouth is and our numbers where our mouth is...a quick fact sheet or a quick grab of the data is going to be really helpful to people.*
 - Member of a student services education team
 - *... the preview has all the responses and the appendices with the open-ended comments. And then we get a summary that is usually about a page. ... those one page summaries of the data are really, really useful.*
 - Associate Dean

Trends

- We did not ask any questions about trend data, but many people brought it up
- Clients find trends particularly useful to put data in perspective
- Comparison data is helpful too
 - *What has made the alumni survey extremely helpful to us is when we have said over time, there is a persistent problem with X and we've measured it. We have used that information to then advance and try and find a solution.*
 - Associate Dean
 - *I'm particularly interested in trends over time... So one of the pieces of data that I really like is that I can say that by the time seniors have graduated, 93% have used the [my service area] and when I started here, one of the reasons they restructured [this area] was that it used to be 40% utilization. So that's like I can say to my staff, "Look at how things have changed over time."*
 - Director of a student service area
 - *Trends...those are incredibly useful for us. I haven't seen one of those in a while but they're wonderful...our profession is undergoing some...changes with demographics of who's coming into the profession and also issues around student debt etc. So these trends right now are really useful to us because they show us changes over the short term and it's a short term during which some big changes are occurring.*
 - Associate dean

Specific Reports

- We were surprised to discover that several of our major surveys were not being used
 - Sophomore survey – Reports & Previews
 - Individual pre-major advising reports, Department-level pre-major advising reports
- Some clients indicated that they review all the reports we send them, but when pressed only mentioned one or two of interest
- Some clients could not recall ever receiving reports that we have sent them on an annual basis for many years
- Interesting feedback concerning open-ended comments
 - Some clients appreciated comment coding, others did not

Perceptions of OIRE

- Overall Satisfaction
 - Responsiveness, helpfulness, good leadership
- Desire for more proactivity
- Lack of awareness of the scope of our services

Satisfaction with OIRE

- Most clients expressed satisfaction with our office because we are responsive, cooperative, helpful, cheerful; “never say no”
- In particular, our expertise in survey design was valued
 - *I always say, you guys do this all the time, and you're doing all these surveys, I mean, what has been your experience? ... That's always very helpful to us. The experiences of others, what it yields for them, and it always makes us take pause and say, well why don't we do it that way, because that's the kind of response we want to get also. So we learn through others based on their past experience. ... I think as long as you guys continue to do that, to offer us things, based on your experiences with other places, or similar, you know, ways of doing things, I think that is very helpful because sometimes people don't remember to ask those questions... they don't know what question to ask.*
 - Associate Dean
 - *So it's a great service when I've gone to [OIRE], and had a question but it wasn't phrased quite properly, [your staff] would understand what I was trying to achieve and then would put it in a language that was consistent with the instrument and that's been really helpful as opposed to having to do that on one's own.*
 - Member of a student service area tasked with assessment
 - *[A primary asset] that you have as an office is not so much that you can make reports or not, it's that you actually know something about these issues. That when I call, precisely, that you can show me how X university did it, or you can tell me that this is a stupid way to ask the question.*
 - Associate dean

Taking the initiative

- Some clients felt OIRE could be more proactive in terms of data analysis, and can take more of a leadership role
 - *Feel free to have your own people tell consumers what they could do and are not doing. Like, did you know we can do it like this one?*
 - Associate Dean
 - *Oh, I think a certain amount of leadership is not a bad thing. Absolutely.*
 - Associate Dean, in response to a question from regarding whether it would be helpful for OIRE to pick out specific areas to discuss during outcomes assessment meetings
 - *Sometimes we may not even know what to ask for and [you guys] will always say, “Well what about this? Or what about that?” and ask the questions of us.*
 - Associate Dean

Lack of Awareness of the Scope of our Services

- There is a general lack of awareness of projects that we conduct with various schools
- Many clients expressed a desire to see the types of things other schools are doing
 - *I would benefit from knowing more, like it's shocking to me how little we know about the other schools at Tufts...I am on this graduate education committee, you know, none of the other deans know anything about the graduate school, so there seems to be a lack of institutional knowledge about the university and I think your office could be very helpful in just giving a landscape.*
 - Graduate Dean
 - *When we were talking about having your office take over the “not coming” survey for admissions, we heard during the [outcomes assessment] meeting that this school asks it this way, and the engineering school does this. It would be great if we could just go in and see...all the questionnaires, all the surveys that are out there so that we could get a better sense. That would be really helpful.*
 - Assistant dean
 - *That'd actually be very helpful [to able to see what other schools are doing]....that would be helpful in working with colleagues because occasionally, you know, I'll be in a meeting and say you know, I wish there was a way to get good data on this over the years and somebody will say Oh we have that. ...I didn't know it existed. So I couldn't ask someone to, to weigh in based on their access to that file.*
 - Associate Dean

Lessons learned

- Value of talking to clients
- People have not been asking for the things that they want
- We now have questions we will ask all clients upfront about their wants and needs
- People are using data, even though we don't know about it
- A lack of feedback is not necessarily a bad thing
- There is room to innovate and improve

Actions Taken

- Increased use of Tableau
 - Mixed reactions (issues with Mac users)
- Complete revamping of Sophomore Survey
 - Productive meeting with all stakeholders
- Plans to revamp Senior Survey in the Fall
- Plans to talk to students about survey experiences

Discussion

- Questions, Comments?
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