Institutional Researchers Unplugged: Our Role in Strategic Planning

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Introduction

- Strategic planning at two institutions:
  - Springfield College
  - Tufts University

- Different stages in the process

- 3 Perspectives
  - Senior Administrator
  - Director of IR
  - Analyst
Springfield College: Strategic Planning

Unique Strategic Planning Process
- Based upon Sollday & Mann (2013). *Surviving to thriving: A planning framework for leaders of private colleges and universities*. Whitsett, NC: Credo.
- Began with the transition to new President.
- Currently finished third year of process.

Over that period we have:
- Initially established 17 different working groups with over 200 faculty staff and students engaged in the process.
- 11 of those groups have completed their work, 6 are on-going and four new groups have been added.

Initiatives ranged in nature:
- More defined projects – Developing a Center for Teaching and Learning
- More complex – Comprehensive Academic Program review, General Education Review
Senior Administrator
Academic Affairs Perspective

Step with care and great tact. And remember life's a great balancing act.

Life is full of surprises, some good, some not so good.

The voice of reason is small, but very persistent.
Director of Institutional Research Perspective

Network Diagram:
- Supervisor
- 17 Working Groups
- Cabinet
- Data Requests
- The Big One
- Comprehensive Program Review
- IR Office Responsibilities
- Always there
- Analyst

Institutional Researchers Unplugged: Our Role in Strategic Planning – May 31, 2018
### Comprehensive Academic Program Review

<table>
<thead>
<tr>
<th>Criteria Name</th>
<th>Who/What</th>
<th>Data Sources</th>
<th>Level</th>
<th>Rating Scale</th>
<th>Undergraduate</th>
<th>Graduate</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>1</strong> History and Expectations (Looking to the past how successful has the program been?) (5 pts.)</td>
<td>Has it changed to stay current with trends in higher education, student demographics and workforce needs?</td>
<td>Review of Program Outcomes Assessment Reports Over time</td>
<td>C/P</td>
<td>Yes or No</td>
<td>100</td>
<td>100</td>
</tr>
<tr>
<td><strong>2</strong> External Demand (is there sufficient demand for the program?) (15 pts.)</td>
<td>Applications (% of total)</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Graduate</td>
<td>P</td>
<td>High or Medium or Low</td>
<td></td>
<td></td>
<td>23</td>
</tr>
<tr>
<td></td>
<td>Undergraduate (first time full time)</td>
<td>P</td>
<td>High or Medium or Low</td>
<td></td>
<td></td>
<td>20</td>
</tr>
<tr>
<td></td>
<td>Transfer</td>
<td>P</td>
<td>High or Medium or Low</td>
<td></td>
<td></td>
<td>10</td>
</tr>
<tr>
<td></td>
<td>What is the level of demand relative to capacity / slots available?</td>
<td>Selectivity (acceptances/application) (low value gets a higher rating)</td>
<td>P</td>
<td>High or Medium or Low</td>
<td>20</td>
<td>18</td>
</tr>
<tr>
<td></td>
<td>Relative yield of accepted students enrolling in Springfield College</td>
<td>Yield (enrollments/acceptances)</td>
<td>P</td>
<td>High or Medium or Low</td>
<td>25</td>
<td>26</td>
</tr>
<tr>
<td></td>
<td>How robust are job projections for graduates of the program?</td>
<td>National employer projections (Graduate) Career placement data to jobs or grad school (Undergraduate)</td>
<td>P</td>
<td>High or Medium or Low</td>
<td>25</td>
<td>33</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>100</td>
<td>100</td>
</tr>
</tbody>
</table>
Anticipating Needs after Final Report is Released

Programs have been ranked on 46 metrics. But how would a program’s ranking change if it improved on certain metrics?

- Not feasible to create “what-if scenarios” based on all 46 metrics
- Identify subset of metrics that matter the most
- Then create Excel interactive

Decision Tree Analysis for Data Reduction
Role of the Research Analyst

Given a question – asked for an answer

http://blog.coghillcartooning.com/2925/classroom-antics-robot-mascot-character/

http://store.metmuseum.org/sculpture/rodin-the-thinker-sculpture/invt/80010981

http://wondersofdisney.webs.com/mickeymouse/mickdetective/mickdetective.htm
Sustainability issues of updating/revising data set

- Final report released to all deans and department chairs contained 3 elements:
  - Written Report from Word
  - Viz from Tableau
  - Rubric from Excel

  Excel File generated
  Mail merge in Word

  Excel File generated
  Tableau Viz

  Data for Rubric from various Excel Files. 1 file for nearly every one of the 46 data points

These 40+ Excel files generated both the Excel files for the Mail merge and Tableau Viz
Tufts University – Strategic Planning Process

- July 2012: New Provost begins
- October 2012: Strategic planning initiative launches
- November 2012 – January 2013: Working groups and Core committees meet and write reports
- Late 2012/early 2013: Conversations about metrics begin
- March 2013: “Prelude to the Strategic Plan”
- June 2013: Feedback from “Prelude” synthesized
- September 2013: Final T10 Strategic Plan available
Associate Provost for Institutional Research

Vision & Direction
- Provost

Writing the plan
- Associate Provost for Strategic Planning

Developing Metrics
- [Associate] Director of Institutional Research
- Intern → Research Analyst

Collecting Data

Tufts Office of Institutional Research and Evaluation
[Associate] Director of OIRE

Strategic Planning Process

Institutional Research

Strategic Metrics

- Finding Data
- Collecting Data
- Organizing Data
- Presenting data
The Plan: What are we trying to do?

The Metrics: How can we measure it?

The Data: What do we see?
Metric Development

4 Themes, 18 Initiatives

- President’s Dashboard (existed prior to T10)
- Strategic Plan Metrics (development & presentation AY 2014-15)
- Diversity Dashboard (Fall 2016 – current)
- TAAC “Dashboard” (November 2015 – current)
- Deans’ Data Hubs (in development)
The Fletcher School: Transformational experiences by race/ethnicity*

During your time at Tufts, have you had a transformational experience? If yes, was that experience a positive one or a negative one?

<table>
<thead>
<tr>
<th>Race/Ethnicity</th>
<th>Yes - positive</th>
<th>Yes - negative</th>
<th>No</th>
</tr>
</thead>
<tbody>
<tr>
<td>URM* (n=18)</td>
<td>72%</td>
<td>28%</td>
<td></td>
</tr>
<tr>
<td>White/Asian (n=123)</td>
<td>64%</td>
<td>33%</td>
<td></td>
</tr>
<tr>
<td>Unknown (n=11)</td>
<td>64%</td>
<td>36%</td>
<td></td>
</tr>
<tr>
<td>Foreign (n=90)</td>
<td>63%</td>
<td>33%</td>
<td></td>
</tr>
</tbody>
</table>
Similarities and Differences

• Organization of planning process
• Roles of VP/Provost, IR Director, IR Analyst
• Metrics: Collection Process & Use
Questions/Comments