

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

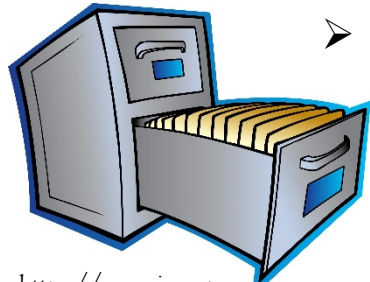
- 3 Perspectives
 - ✓ Senior Administrator
 - ✓ Director of IR
 - ✓ Analyst



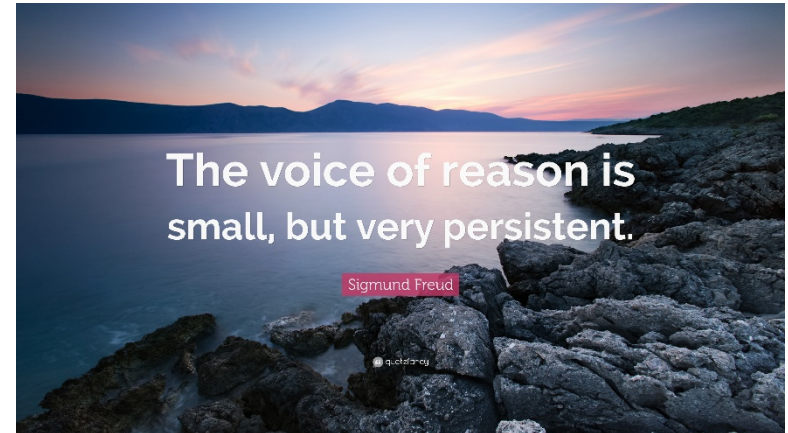
SPRINGFIELD
COLLEGE


Springfield College: Strategic Planning

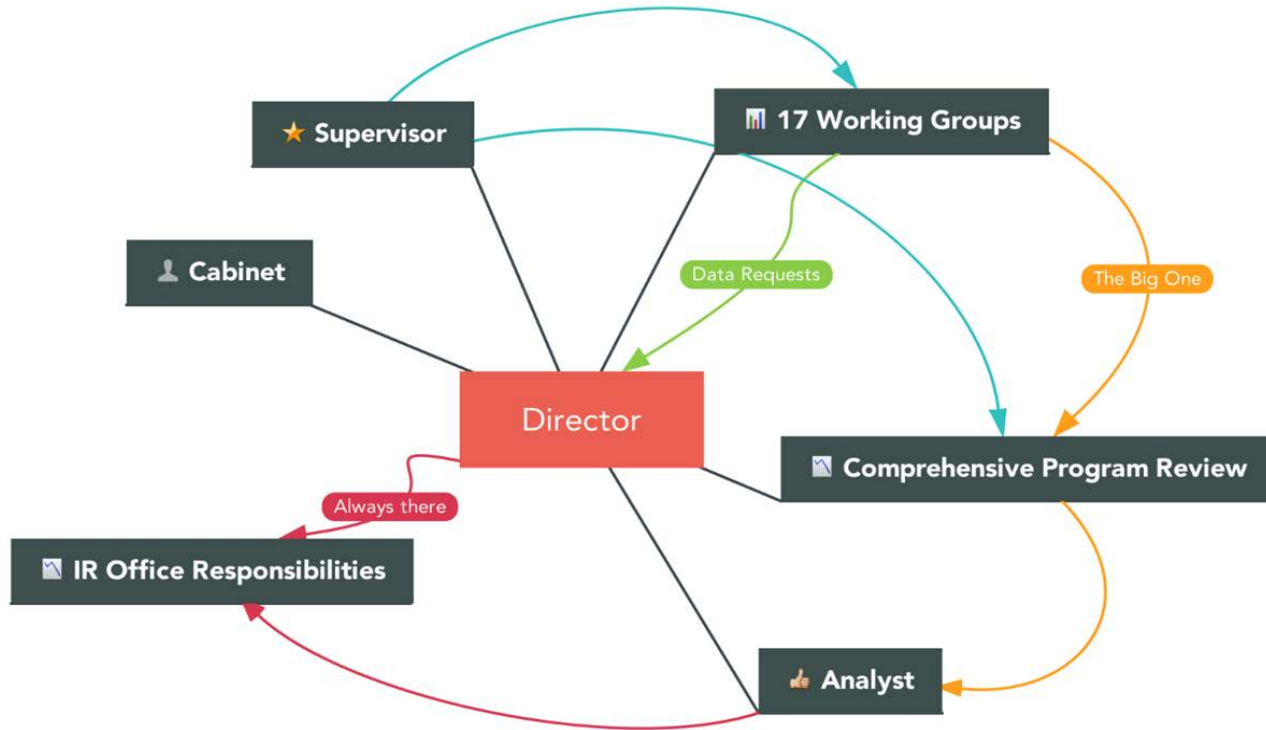
- Unique Strategic Planning Process
 - ✓ Based upon Solliday & Mann (2013). *Surviving to thriving: A planning framework for leaders of private colleges and universities*. Whitsett, NC: Credo.
 - ✓ Began with the transition to new President.
 - ✓ Currently finished third year of process.
- Over that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



Director of Institutional Research Perspective



Comprehensive Academic Program Review

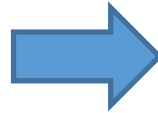
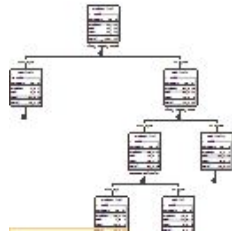
Criteria Name	Who/What	Data Sources	Level	Rating Scale	Points	
					Undergraduate	Graduate
1 History and Expectations (Looking to the past how successful has the program been?) (5 pts.)	Has it changed to stay current with trends in higher education, student demographics and workforce needs?	Review of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

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?

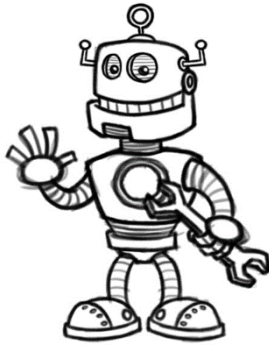
- Not feasible to create “what-if scenarios” based on all 46 metrics
- Identify subset of metrics that matter the most
- Then create excel interactive

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/ro-din-the-thinker-sculpture/inv/80010981>



<http://wondersofdisney.webs.com/mickey-mouse/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



Excel File generated
Mail merge in Word



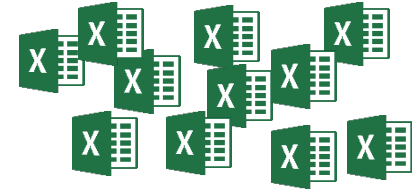
Viz from Tableau



Excel File generated
Tableau Viz

Criteria Name	Sub-criteria	Data Source	Level	Rating Scale	Weightable	Goalable
Internal and External Stakeholders (to be assessed by the program) (20%)	What is the current state of the program?	Number of Program Involvement Reports per Year	GP	1-5	Yes	Yes
	What is the value added to the program?	Number of Program Involvement Reports per Year	GP	1-5	Yes	Yes
Internal Stakeholders (to be assessed by the program) (20%)	What is the current state of the program?	Number of Program Involvement Reports per Year	GP	1-5	Yes	Yes
	What is the value added to the program?	Number of Program Involvement Reports per Year	GP	1-5	Yes	Yes

Rubric from Excel



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



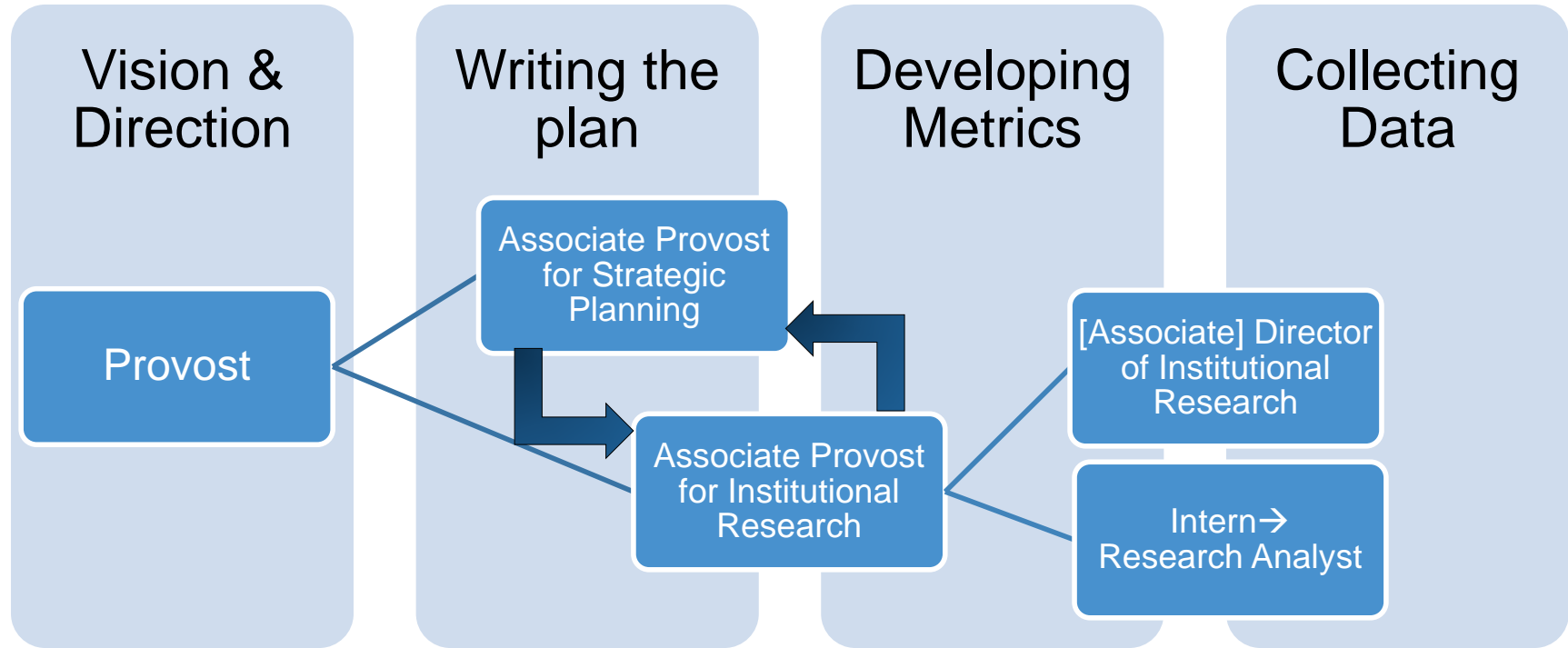
TUFTS UNIVERSITY

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



[Associate] Director of OIRE

Strategic Planning Process

Associate
Provost for IR

Associate
Provost for
Strategic
Planning

Institutional Research

Data support for
Planning Process

Evaluation of
Planning Process

Strategic Metrics

Finding
Data

Collecting
Data

Organizing
Data

Presenting
data

Analyst

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)

Evolution

November 2013

April 2015

November 2017

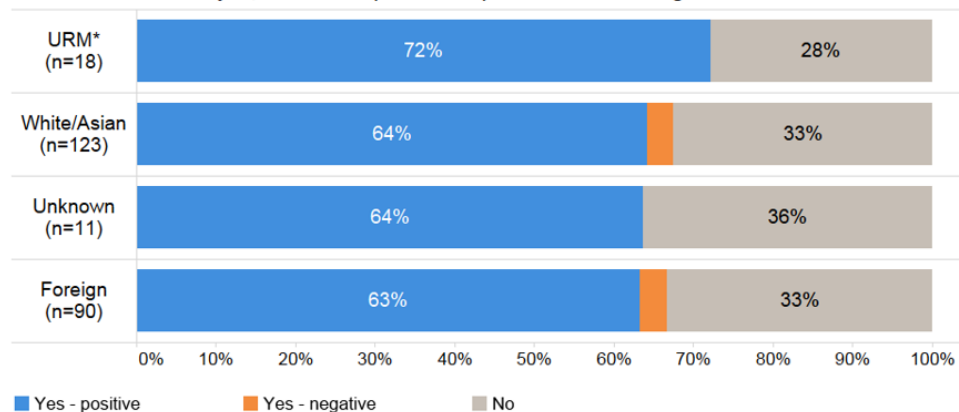


Undergrad

During your experiences t
world

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?



Similarities and Differences

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



Questions/Comments

