1. Support Services Report Template

Report Info
Name of the person completing this report: Amber Machamer
Title of the person completing this report: AVP Planning, IR and Data Warehouse
Supervisor/dean reviewing report: Linda Dalton
Service: Planning and Institutional Research
Division/College: PEMSA
Name of second reviewer (if necessary): Linda Dalton

3. Mandated Service

1.1 Please indicate below if any aspect of the service is legally mandated by any of the following and provide the relevant reference.

Federal Law: PIR is the keyholder for IPEDS reporting (federally mandated reporting)
State Law: PIR provides data and information to campus services for their state reporting.
Executive Order: PIR provides data and information to services that are required by executive order as well as other mandated reporting such as Completed College America.
Title 5: PIR provides data and information to campus services for their Title 5 reporting.
Campus Policy: PIR provides "official" data for campus processes such as program review.
Any other: Accreditation. PIR provides data, information and analysis for WASC accreditation as well as College/program specialized accreditation.

Provide a brief explanation, if necessary, in < 60 words.

While there are no federal or state mandates for an Office of PIR, our office generates data and analysis for many mandated purposes (IPEDS-NCAA-accreditation-grant-reporting). We provide "official" data for program review, graduation-rates, student/staff/faculty satisfaction (all essential for accreditation). WASC stresses the need for an IR office that is integrated with processes and the central role IR plays in Institutional Effectiveness.

4. Importance of Service

Briefly describe the service in terms of its primary function(s) and purpose(s) using <120 words

The purpose of PIR is to provide the data, analysis and decision-support to advance the University’s Shared Commitments by providing timely, systematic, insightful and user-friendly data and analysis that supports planning, enhances decision-making, informs policy, aligns resources, fulfills reporting requirements, and measures-evaluates-communicates institutional effectiveness to the entire University community as well as external audiences through vigilant data stewardship, boundless curiosity, and steadfast adherence to customer-service principles. We are committed to building a campus culture of inquiry, collegiality, accountability, and equity. PIR’s ultimate goal is to support the University as it enables and inspires students to reach their goals while becoming engaged and valued contributors to their communities. CSUEB’s success can be measured by the success of our students and graduates.

2.1 Who are the primary receivers of this service? (Please enter the percentage of each user group that is relevant)

Students: 5%
Faculty : 25%  
Administrators/staff : 25%  
Colleges/departments : 10%  
Academic Senate and/or committees : 19%  
Alumni : 5%  
Community outside University : 10%  
Other : 1%  
Total : 100%

Link to Scoring Rubric

2.2 Please indicate the direct or indirect impact of the service on students for each of the three University Action/Student Impact Areas listed below (for example processing financial aid applications would be direct impact on students while managing utility services would be indirect).

<table>
<thead>
<tr>
<th>Direct Impact on Students</th>
<th>Indirect Impact on Students</th>
</tr>
</thead>
<tbody>
<tr>
<td>Pre-college (helping students to enter the system)</td>
<td>✔</td>
</tr>
<tr>
<td>During college (helping students succeed while they are at Cal State East Bay)</td>
<td>✔</td>
</tr>
<tr>
<td>After college (helping students establish meaningful lifework and be socially responsible contributors to society)</td>
<td>✔</td>
</tr>
</tbody>
</table>

Provide a brief narrative (<60 words each) explaining your selection for each area.

<table>
<thead>
<tr>
<th>Evidence submitted to support the chosen selection (&lt;60 words for each)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Pre-college (helping students to enter the system)</td>
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</tr>
<tr>
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</tr>
</tbody>
</table>

Link to Scoring Rubric

2.3 Applying the four choices presented below, please indicate the consequence of NOT having this service on each of the actions in the left hand column.

<table>
<thead>
<tr>
<th>4 - Service provides evidence of direct impact in more than one area</th>
<th>3 - Service provides evidence of direct impact in one area</th>
<th>2 - Service provides evidence of indirect impact in more than one area</th>
<th>1 - Service provides evidence of indirect impact in one area</th>
</tr>
</thead>
<tbody>
<tr>
<td>Pre-college (helping students to enter the system)</td>
<td></td>
<td></td>
<td>✔</td>
</tr>
<tr>
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<td></td>
<td></td>
<td>✔</td>
</tr>
</tbody>
</table>
Provide a brief narrative (<60 words each) explaining your choice.

<table>
<thead>
<tr>
<th>Service</th>
<th>Evidence submitted to support the chosen selection (&lt;60 words for each selection)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Pre-college (helping students to enter the system)</td>
<td>Families and prospective students will not have the information they need for choosing a college. We may loose a competitive edge in recruiting students if information is not available.</td>
</tr>
<tr>
<td>During college (helping students succeed while they are at Cal State East Bay)</td>
<td>CSUEB will not be able to assess student progress, barriers to graduation, and effectiveness of interventions. For example, AACE recently funded a new position based upon survey data showing students are less satisfied with the amount of help CSUEB provides them in finding careers.</td>
</tr>
<tr>
<td>After college (helping students establish meaningful lifework and be socially responsible contributors to society)</td>
<td>Any information we have developed on student life after CSUEB (employment, other college work, reasons for dropping out) will be lost.</td>
</tr>
</tbody>
</table>

Link to Scoring Rubric

2.4 Alignment with Shared Strategic Commitments

How does this service contribute to or align with any of the eight Shared Strategic Commitments (SSC) listed below?

<table>
<thead>
<tr>
<th>Shared Strategic Commitments</th>
<th>If aligned or contributing, provide a description. (&lt;60 words for each SSC)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Reinforce academic quality through open-minded inquiry, innovative teaching, engaged learning, and distinguished scholarship</td>
<td>PIR supports programs with data for program review as well as more detailed analysis of the success of their students and programs. We assist faculty with their research (FLC/PEIL). We collect, analyze and communicate data about student engagement, success, and barriers.</td>
</tr>
<tr>
<td>Enhance our inclusive campus, responding to the backgrounds and interests of our diverse community and promoting their academic, professional and personal development</td>
<td>PIR disaggregates institutional and survey data by race, ethnicity, gender, native/transfer, age..to track and monitor any differences in outcomes based on these and other factors.</td>
</tr>
<tr>
<td>Serve students first, by expanding access and enhancing each student’s educational experience and prospects for success as a graduate and life-long learner</td>
<td>We supply data, information and analysis to services (admissions, AACE, SCAA, freshman cluster etc...). We track graduation rates, subsequent employment and graduate education of our students.</td>
</tr>
<tr>
<td>Foster a vibrant community through enriched student services and student life that support student engagement and learning</td>
<td>We provide data and information to services that directly impact student life such as Housing, orientation, Health Center and service learning.</td>
</tr>
<tr>
<td>Contribute to a sustainable planet through our academic programs, university operations, and individual behavior</td>
<td>PIR has assisted in deploying a transportation survey (as part of a faculty PEIL grant) and often assists in information requests from parking and other units responsible for planning.</td>
</tr>
<tr>
<td>Continuously improve our efficiency, transparency, and accountability while practicing mutual respect, responsiveness, and collaboration across the University</td>
<td>PIR provides all official data that drives improvement processes as well graduation rates. Additionally, we collect analyze, and communicate survey data that tracks and monitors campus climate. We work with individuals, committees and offices in a collaborative way to not only meet their data needs but exceed their expectations.</td>
</tr>
<tr>
<td>Support the civic, cultural, and economic life of all communities in the regions we serve through partnerships that promote education and social responsibility</td>
<td>PIR actively supports these partnerships by providing the data and information needed for many of our grants such as Promise Neighborhoods.</td>
</tr>
<tr>
<td>Demonstrate our continuing record of leadership and innovation in higher education</td>
<td>PIR supports the University by providing the data and information needed for...</td>
</tr>
</tbody>
</table>
education, focused on 21st century skills, including science, technology, engineering, and mathematics (STEM) many of the STEM grants. Additionally, PIR has supported the Carnegie Statway pilot with data as well as working with Carnegie on assessment of Statway.

2.5 How might the demand for this service change over the next five years? (Please choose one category below).

Likely to increase

Provide a rationale for your choice (assumptions, impact of new policy, etc.) in <120 words.

The increased focus on accountability and transparency at the local, state and federal levels will make Institutional Research a much sought-after resource. Accreditation, grants, Complete College America, academic and co-curricular program review processes all rely on quality data and analysis. More importantly, the data need to be aligned with the processes and criteria those processes use. In higher education literature, Institutional Research must become a trusted and valued partner in pushing institutional culture to one that acts strategically to set goals, identify metrics to track performance and evaluate effectiveness to improve student success. Institutional Research is an essential ingredient of a transparent and effective University. PIR is committed to meeting that trend in Higher Education.

5. Quality of Service

3.1 Do you assess the quality of the service you provide?

No

If “Yes”, what benchmarks, best practices or measures of success, either internal or external, do you use to measure service quality (e.g., timeliness, accuracy, adequacy, meeting deadlines, satisfactory completion of assignment, etc.)? Please describe in <120 words. If no, please explain.

PIR is designing an internal performance review model using some of the criteria developed by the PFD process. We will set annual goals and develop metrics to track progress and pinpoint areas of weakness. One important part of our measurement will be customer satisfaction (deployed upon the completion of a project) and a periodic employee engagement survey.

3.2 During the last three years, have you adopted any measures to improve the quality of this service? Please describe in <120 words.

PIR, in its current form, has been here for 2 years. While we did have some products from earlier Offices we have been developing many of our products from scratch. Effectively, PIR had ceased to operate except for a few functions (IPEDS locking, Factbook, and limited ad hoc requests). In the past two years we have developed a work-flow process, a request form, and began using the data warehouse as a more complete source of data. In two years we have gone from a dormant office to a fully functioning office. In our next phase we will focus on going from "functional" to "exceptional".

3.3 What idea(s) do you have for improving the quality of this service within existing resources (e.g. development of benchmarks, surveys, feedback, etc.)? Please describe your plan(s) in < 120 words.

As stated, we are developing our annual goals and metrics. We will use customer surveys and well as employee surveys to assess ourselves. We will conduct a meta-analysis of our project logs to see how we spend our time, what can become automated reports in PDW, and where data is being used in the University. We are developing a work-flow documentation process not focused on stated customer needs, but rather, exceeding expectations. We often work with Data Warehouse to add the variables and data
sources needed by the University to assess effectiveness and support operations.

**Link to Scoring Rubric**

3.4 What ideas do you have for improving the quality of the service if additional resources were provided. Please describe your idea(s) in <120 words.

With more resources we can expand the number of services we provide and improve delivery time. We could use new tools for end-users such as Tableau to enhance access to data. We could more-fund support survey research for the University by developing, deploying and analyzing survey data from campus-based research projects. We'd like to increase the amount of professional development available to our staff to keep up to date on the latest tools and trends in IR.

**Link to Scoring Rubric**

3.5 Do you use any formal or informal process to assess the level of satisfaction of the service users?

No

If yes, describe the process and most recent results in <120 words. If no, please explain.

Not at this time. We are using the PFD process and survey results as “baseline”. We will monitor monthly and annual progress in the coming year.

**Link to Scoring Rubric**

3.6 The university recently conducted a customer satisfaction survey for some services (results for this service are attached, if applicable). Do you have any comment or response to the results? Please describe in <120 words.

PIR has lower levels of Usage among faculty/staff compared to University/PEMSA means. We are rated less important than faculty/staff. Faculty rate PIR slightly lower on “Quality” compared to the University/PEMSA averages. Staff rate PIR Quality above the PEMSA average and slightly lower than the University average. We attribute low “Usage” and “Importance” to the instability of PIR in the past 10 years. PIR plans to have a focus on end-users including and new web site, customer-satisfaction protocols, improved distribution of survey data. We plan to redesign some of our products and work one-on-one with faculty/departments. Part of our focus will be instructing the University community as to what PIR does and how to better use the dedicated professionals in PIR.

**Link to Scoring Rubric**

3.7 Do you have any formal or informal guidelines for personnel in your department regarding how to treat/interact with receivers of this service?

Yes

If yes, please describe in <120 words. If no, please explain.

We have a document in development called the CDCD (Consult, Deliver, Confirm, Document). We will be fleshing out the document and using it to finding ways to improve performance at each staff meeting. We will tie Customer Sat survey questions to this document. Our work flow document is also part of our plan to improve our quality and customer satisfaction. However, even the best designed data and analysis are unless if the processes do not use criteria that are based on clear priorities. Goals, priorities and criteria need to be set and the data aligned with them. Data that are not tied to criteria won’t be used to increase institutional effectiveness.

**Link to Scoring Rubric**

3.8 Does your service have annual goals (targets) of achievement regarding the quality of the service provided?

No
If yes, describe the annual quality goals (targets) and indicate if the service achieved those goals (targets). Please provide evidence, if possible, in <120 words. If no, please explain.

In Development. We will be using the PFD process as a baseline. We plan to have annual goals that are evaluated via customer surveys, employee surveys, web-site tracking with google analytics, as well as some quantitative measures of volume and on-time delivery.

3.9 Does your service have annual goals (targets) of achievement regarding the quantity of service provided?

No

6. Efficiency of Service (cost effectiveness)

4.1 Using the spreadsheet provided for all employees in your department, please distribute salaries of individuals across all services provided to reach an educated or reasonable estimate of the cost of providing the service.

235849

4.2 Using the spreadsheet provided, please distribute your department’s annual operating expenses across all services provided to reach an educated or reasonable estimate of the cost of providing the service.

23676

4.3 Using the spreadsheet provided, please distribute the square footage of work space across all services provided to reach an educated or reasonable estimate of the use of this resource.

369

4.4 During the last three years, have you adopted any measures to improve the efficiency (cost effectiveness) of providing this service (e.g. reducing salary costs, operating expenses or use of space, or increased output without increasing cost. Etc.)?
Yes

If yes, please describe the measures in <120 words. If this is a new service introduced over the past three years, please indicate. If no, please explain.

Since this office was essentially dormant for two years PIR has been in ramp-up mode. While we cost more than we did when were dormant, the quality has improved markedly. With more staff we are able to divide up work in a manner that uses each employee’s strengths. Before, we could only respond to a few requests. Now we are able to respond to most requests as long as the data exists. We believe there is a lot of pent-up demand for Institutional Research. As users learn that PIR is a trustworthy service we expect demand to increase.

4.5 What idea(s) do you have for improving the efficiency (cost effectiveness) of this service within existing resources (e.g. restructing, merging, outsourcing, ways to cut costs, technology, etc.)? Please describe those ideas in <120 words.

Using Qualtrics software to automate some survey reporting. We also will institute a prioritization process based upon transparent criteria so that the most impactful projects get more immediate attention. Work with Pioneer Data Warehouse whenever possible to automate certain routine reports. Fully implement request form, work flow document, and customer Satisfaction protocols.

4.6 What idea(s) do you have for improving the efficiency (cost effectiveness) of the service if additional resources were provided. Please describe your idea(s) in <120 words.

Using Tableau to increase access to data and enhance user experience. Hiring a student assistant to be our Office Manager to manage work flow, follow-up, deadlines and customer service survey.

4.7 Do you have any plan(s) to improve the efficiency (cost effectiveness) of this service in the next 1-2 years (e.g. reducing costs, increasing productivity, etc.)?

Yes

If yes, please specify whether these plan(s) involve reducing salary costs, operating expenses and/or use of space. Please describe your plan(s) in <120 words. If no, please explain.

Using an analysis of our projects we will identify the types of reporting that we can have come out of the Data Warehouse, leaving our staff open for more analytical requests. Using the web site to push out our products to increase access. Develop, communicate and implement prioritization criteria to ensure we work on the most impactful projects with the most potential to improve Institutional Effectiveness and long-term goals. Fully implement request form, work flow document, and customer Satisfaction protocols.

4.8 Please describe the estimated output for this service for fiscal year 2011-12, quantify if possible (e.g. volume, service tickets resolved, people serviced, appointments, etc.) in <120 words.

In 2011-12 the PIR started with a new AVP and one existing Research Associate. November 2011 we added Research Associate. Our work fits into six categories: Reporting, Survey Research, 3rd-party, Ad Hocs, Grant-support, Institutional-Culture. Reporting includes fact-book, program review, enrollment-tracking, census-date Quick-facts, Provost’s budget process, graduation-tracking (all annual-quarterly or weekly). Surveys includes PIR initiated surveys as well as support to other units. 3rd-party surveys include: US News, IPEDS, Wintergreen, NCAA, WASC, etc. Ad Hoc Reports constitute a large portion of our work. In any given month we may have over to 1 dozen ad hoc requests. Grant requests tend to be sporadic but urgent and highly time-consuming. PIR also spends considerable time and energy working with campus-community to influence institutional culture.
5.1 Are you aware of services similar to this one that are being provided by another department at CSU East Bay?

No

If yes, please provide a list of those departments. How are the services described here similar or different? Please describe in <60 words.

While there is sometimes overlap with Pioneer Data warehouse and PEMSA Technology Support/Student Data Management, no other office provides PIR services. Other services generate lists and row-level data directly to end-users. PIR uses aggregated reporting and analytic products. PIR does systematic official University reporting (factbook, census quick facts etc.) PIR is University wide, not college or department based.

5.2 Is there anything unique or distinctive about your service? Please describe what is unique or distinctive in <120 words.

With an invigorated sense of urgency and confidence, PIR works to ensure that data and information are integrated into University decisions and processes. We work with the campus community to understand data and analytic needs and align our activities accordingly. Additionally, we align our professional development activities with an eye towards emerging technologies and other tools to anticipate and meet increasing needs for data and analytics. We strive to create a well-run and trusted office as a means to our ultimate goal which is to influence Institutional Culture and increase Institution Effectiveness. PIR supports CSUEB in becoming the type of institution that unflinchingly uses data and analysis to continually prioritize, strategize, and synchronize efforts to improve student success.

5.3 Are there any additional things about this service that you would like the task group to know? Please describe/explain in <250 words.

Thank you for taking the time to read about PIR. We are a team that truly enjoy what we do and see our role as much more than providing data and analysis. Our goal isn’t just to run a good research office. Running a good research office is a means to our ultimate goal which is to influence institutional culture to be transparent, act strategically, and measure the University’s success by the success of our students and graduates.