

IU Institutional Research Council
University Planning, Institutional Research,
and Accountability

November 17, 2006
10:00 AM to 12:00 PM
University Library, Room 1116 (IUPUI)

Meeting Notes

Attendees: Doug Anderson, Karen Black, Mary Blakefield, Rachael Boon, Victor Borden, Kathy Burton, Carey Conover, Ty Cruce, Brandon Deckard, Jim Donges, Dennis Hicks, Steve Keucher, Kathryn Lantz, John Novak, Gary Pike, Doug Priest, Vicki Roberts, Todd Schmitz, Tim Sehr, Linda Shepard, Marilyn Vasquez, and Benjamin Young

Regrets: Mary Ann Baker, Kathleen McNeely, Lilia Santiago, Jack Schmidt, and Carol Wood

1. INTRODUCTIONS

Victor Borden opened the meeting and participants introduced themselves, their role and their campus affiliations. Victor reviewed the agenda and gave a broad overview of the purpose of the IR Council and goals of the current meeting.

2. PROSPECTIVE AGREEMENT WITH HANOVER RESEARCH COUNCIL

Mr. Puck Fernsten, General Manager, Market Development, from the Hanover Research Council (www.hanoverresearch.com) was introduced. Puck's role at the meeting was to articulate the value proposition underlying membership in the Hanover Research Council. He discussed the purpose and history of the HRC and ways in which HRC could assist the Indiana University campuses in capacity building primarily in the areas of institutional research and reporting. The mission of the HRC is to service established clients by assembling external inter-disciplinary core research teams to assist with projects and address questions posed by member organizations (i.e., surveys, benchmarking, peer analysis, etc.). If retained, the HRC would grant access to their research team(s) to work with IU campuses via UPIRA on research projects requiring additional manpower or resources. Data collection and reporting is emphasized rather than interpretation of results.

In previous conversations Vic and Puck agreed that IU could join the HRC as a consortium of campuses rather than as an institutional member. Joining in this fashion would reduce the overall cost burden to the institution. For the first year, membership fees would be assumed by regional campuses at a rate of \$5,000 per campus; with IUPUI and IU Bloomington allotting \$15,000 each and a potential \$10,000 from University Administration.

Vic then discussed the role of Ty Cruce, Senior Policy Analyst in UPIRA as the single point of contact between individual campus requests and the HRC. Ty would work with campuses to craft their research questions, identify their needs and look for system-wide synergies in the area

of common issues and interests (i.e., on campus housing, employment of IU graduates, etc.). Ty would also be responsible for ascertaining whether questions would be handled internally by UPIRA and University Reporting and Research, or moved forward to HRC. Vic indicated that the internal process of shaping requests needs additional formation.

3. HANOVER RESEARCH COUNCIL PRESENTATION Q&A

As anticipated many questions were asked and much discussion ensued regarding the feasibility of an engagement with HRC. IRC Council members were concerned with HRC's track record and expertise in higher education and turn-around time.

Puck indicated that HRC has existing engagements with sixteen institutions of higher education, they have a group of talented researchers and depending on the type of project HRC could draw upon individuals beyond their core research team. (Puck will send the list of participating institutions and Vic will contact several institutions to gauge satisfaction and track record with HRC). Puck said HRC works with the client to clarify the content and scope of the request. HRC will then construct the research team in what ever way they think is most productive. In terms of responsiveness to requests, the turn-around time depends on the scope of the project; with a more precise estimate possible once the specific research questions are defined. Puck said that in general they work very rapidly.

The IR Council wanted to know how HRC manages the work load of requests to be responsive to all of their clients. Puck indicated that HRC employs a project management approach and he would be IU's single point of contact. Several IR Council members indicated there is a need to identify specific questions and priorities to ask HRC to work on to make the engagement worth the campus' while in terms of return on investment. Puck indicated that while some questions may be proprietary and results held in confidence others may be shared with the larger group in terms of best practices, thus creating synergies among institutional member organizations. Further, Puck indicated shared information is encouraged although there is not a central repository of searchable inter-institutional information available on the HRC website.

IR Council members inquired about the cost benefit analysis on their \$5,000 investment and the ramifications of terminating their engagement with HRC after one year. Puck stated HRC guarantees client satisfaction.

An important question was raised in terms of how the IR Council will evaluate the 'value' of HRC to IU? What is the ROI? Victor will initiate an assessment process for summative and formative purposes. Victor stated that UPIRA will be evaluating ways to tie requests together among campuses, prioritize questions, and then forward them to HRC. Victor encouraged participants to consider the basic value of HRC and then look at the value of having 'x' number of extra staff to handle requests; or look at 'x' number of additional projects that could be accomplished with the assistance of HRC; or look at the ROI question from the perspective of increasing campuses' capacity to broaden their services.

4. POST HRC PRESENTATION DISCUSSION

An IR Council member indicated he had previous experience with a study conducted by HRC for Notre Dame and is skeptical of HRC's ability to ask probing questions. Consensus was arrived at that the IR Council would look to HRC for gathering data rather than looking to them for interpreting the results. The issue becomes then how do we make the information relevant for the campuses?

One IR Council member questioned if it was just as cost effective and beneficial to hire a bright graduate student at the same cost? Calculated at \$15.00 per hour for a graduate student at \$5,000 the student could work 333 hours or 16.6 weeks. An initial engagement with HRC would be for a year with an "unlimited" number of hours.

An IR Council member indicated that if a question comes up that an office can't handle then it might be a good mechanism to use HRC for quick turn around, i.e., How do we learn more about our peer institutions? What academic programs do they have? Are their programs comparable to ours? These questions do take time, but are not inherently difficult answer. Can the HRC answer these questions in depth? Victor indicated UPIRA's assistance in interpreting results from HRC.

Other IRC comments included thinking the engagement could be beneficial for campuses because of manpower costs; the initial investment is not too high given other resources; and if we give clarity to structure of requests it will help us internally to take pressure off of existing staff with limited resources; it offers an upside for our size of institution that doesn't already have the expertise.

Further comments were voiced regarding the difficulty we have in not knowing what specific research questions need to be asked and what our current un-met research needs are. One IR Council member suggested postponing our decision on HRC for one year to learn more about HRC and other similar organizations and to spend more time developing the types of questions we may want to address with external research companies like HRC. One IR Council member said that the identification of Peer Institutions will put more pressure on regional campuses to know their peers and in this way HRC might be helpful.

Vic wrapped up the discussion with the notion of checking further into current university clients and, depending on that feedback, potentially trying an engagement with HRC for a year, triaging questions, and evaluating results along the way. If this model doesn't work the IR Council could consider a similar model internally.

5. REVIEW OF MATERIALS FROM LAST IR COUNCIL MEETING

Victor reviewed meeting handout materials:

- Page 5 and 6 of the handout is a summary of the Post It Notes Exercise;
- Pages 7 is an attempt to pull together the ideas in MindJet format;

6. SUGGESTED IR COUNCIL PROJECTS

Victor led a discussion of potential projects that the IR Council could consider in terms of next steps. The following questions were posed by topic:

- a. IR Database: Could we establish a Database that pulls together information such as IPEDS does for IU in terms of basic enrollment information, basic staffing information; is it possible to develop a tertiary database? To what degree do we leverage and align existing data?
- b. Inventory Reports: IUIE is a canned program designed to generate queries. Todd, Kathy, Linda, and John all have a slew of reports. Is there some way we can organize these and share them with others? Or advise each other on the scope of reports planned and completed?
- c. It would be helpful to create a mailing list and notify individuals when reports are posted and current, for example announce when the most recent FactBook is updated.
- d. How do we broadly disseminate the results of other surveys that are conducted on our campuses?
- e. Can we arrive at some standard cross-campus definitions of terms for reporting?
- f. Given that we will never get a single environment, how can we work more closely together, i.e., in terms of Enrollment Projections: Where is this process going? How does this relate to budget and enrollment projections? When and how do the finance and enrollment planning people work together?
- g. Access Tools: A year ago Dennis Cromwell said there is an open source code available but it currently isn't being used. The Bloomington Registrar's reporting area is using SPSS web analysis and dissemination tools. SAS and Clementine would love to sell us a product, but UITS says we have a free tool here to use. How do we resolve this?
- h. Web Reporting Tools: Do we want to develop front end reporting tools that better generate needed information? *Ask Vic for the reference on the cool international tool he spoke of.*
- i. Data Definitions and Standards: Do we need to resurrect the group that looks at how data are being used? Steve Kucher indicated that the parent committee (Dennis Cromwell) is no longer active but this group may come together again soon.
- j. UITS - DATA ADMIN - IR Council Synergies: What are the links between these entities? How do we organize the focus of these groups?
- k. How do we maintain Peer Data? How do we collect Peer Data? Vic sees this as a core operation of UPIRA. We will do an annual peer ranking report that link to the Accountability effort. UPIRA will be developing disciplinary data and creating data exchange. Should we be looking at Peer Benchmarking?

l. IR Database: Could it become available to all? Should we be talking about Environmental Data?

m. Other Comments and Questions: Best Practices and usefulness of having a benchmark for what we are doing. Get advice on what to look at in terms of assessment; what are other resources? Vic referenced the University of North Carolina (?) website.

7. **NEXT STEPS**

a. For these projects the IR Council will identify a lead and then contact interested parties to create an action plan. UPIRA will act in a leadership role or stand back and facilitate as needed.

b. The IR Council then engaged in an exercise to priority rank 2-3 of the suggested projects that could be accomplished.

RESULTS OF EXERCISE (in rank order):

1. Inventory of Reports – UR&R
2. IR Database – UR&R

3. Program Evaluation Assessment
4. Web Reporting Tool
5. Data Definitions/Standards (can be partly accommodated in IR Database)

6. Peer Data
7. Environmental Scanning

c. The IR Council will now meet on e-mail (and perhaps only once in person annually). UPIRA will develop a list serve as a method of communicating with the Council.

d. Victor and Ty will probe HRC's reputation/usefulness with other member institutions. Once this is accomplished Victor will report back to the IR Council and next steps will be established.

e. UR&R will spear head an effort to establish standard operating procedures for receipt of, dissemination of, and reporting of surveys that are received by the institution in an effort to coordinate surveys among campuses.