



# ASSESSMENT, EVALUATION & RESEARCH

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STUDENT AFFAIRS | THE UNIVERSITY OF UTAH

## Annual Report 2018-2019

### **Mission**

The Student Affairs Assessment, Evaluation, and Research department (AER) leads the assessment process to provide meaningful information to promote student success through the programs and services within Student Affairs.

## Overview

### Accomplishments

Our most significant accomplishment was migrating our primary survey software from Campus Labs (which had been in use for over a decade) to Qualtrics. The process of implementing Qualtrics included the following elements:

- Customized the platform (branding, creating a directory with student systems information);
- Determined the process for gaining access to the software and reviewing all of the permissions, in order to comply with FERPA and other parameters, and then setting up over 100 users;
- Developed a new process for survey development and administration that empowered users across the division to customize their surveys to a greater extent;
- Provided 14 training sessions with a total attendance of 85 staff on different aspects of the platform, including the new process for survey development, the mailing administration method, the library features, and more.
- Collaborated with campus partners to determine what our shared needs were and ensure that each area was able to use the product in a way that met their needs, without negatively affecting other areas or overburdening AER; and
- Created a large number of surveys in Qualtrics, particularly at the beginning, to ensure that departments could continue ongoing projects without interruption in data collection.

We continue to learn Qualtrics functionality and roll out different segments of the platform to our users. We have already seen departments able to improve processes and increase efficiency through the use of the tool (e.g., being notified when there is a response that needs immediate attention, producing customized reports with ease).

Other key accomplishments included the following:

- Standardized utilization data reports which include key student characteristics, in order to provide departments with foundational knowledge about use of programs and services (see section 2.d.);
- Finalized interactive dashboards for both the Graduating Student Survey and the First Destination information and beginning the process of rolling out those dashboards to departments both within the Division of Student Affairs and our academic partners (see “One University”);
- Developed a report on the Campus Climate Survey on Sexual Assault and Misconduct (see 1.b.).

### One University

A key effort by AER to advance “One University” this year was to share dashboards about graduating students with academic colleges. Specifically, AER developed First Destination dashboards (in collaboration with Career & Professional Development Center) and Graduating Student Survey dashboards (both quantitative information and sentiment analysis), which contain a plethora of information about graduating students. We then developed a process and implemented security measures to ensure that faculty and staff within the colleges could access useful information for their own students but not for students in other colleges. We met with representatives from the College of Social and Behavioral Science multiple times to provide an overview of the data and discuss how they could use the information to meet their own reporting needs and inform program decision-making. We

also met with representatives from the College of Fine Arts, the David Eccles School of Business, the Honors College, the College of Medicine, and the Graduate School, as well as sharing about the dashboards at a meeting of the Student Data Warehouse Users Group (which includes key data-focused individuals from all of the colleges).

In addition, AER collaborated with the President's Task Force on Healthy Relationships, both to provide them with reports and information that already exist about students and to collect utilization data at an event they were planning. Similarly, we provided data to the Homeless Student Task Force.

As noted above, the license of Qualtrics that AER manages includes other student service areas, and AER worked closely with those areas to support their implementation of Qualtrics. Undergraduate Studies was able to modify our process for granting access slightly and establish 67 users to create 221 projects. AER collaborated with the Office of Equity and Diversity to establish accounts for 13 staff and create 30 projects. We continued to support survey administration through Qualtrics for Enrollment Management. In addition, we granted access to four staff members in the Office of Budget & Institutional Analysis and select users in other areas where we partner frequently, and we will provide ongoing support for these users.

### Equity, Diversity and Inclusion

The primary initiative that AER progressed this year was to develop a set of standard demographic questions that are useful and inclusive. We researched national standards both within higher education (e.g., NASPA, the Consortium of Higher Education LGBT Resource Professionals) and external to higher education (e.g., the United States Census Bureau). Then, we solicited volunteers and convened a group of colleagues from across the Division to review the research and discuss issues and concerns. While we were not able to finalize these questions, we hope to do so in the upcoming year.

We also continue to work with staff in other departments to think about and implement assessment processes that address equity, diversity, and inclusion. For example, when we provide the standard utilization report of student demographics, we include a parallel report on the University student body, so that departments can reflect on who is and is not represented in their programs and services. Further, while we do not yet have an official recommendation for survey demographics, we encourage departments to make small changes to questions to make them more inclusive (e.g., changing "Other: \_\_\_\_" to "Self-identify: \_\_\_\_").

### Department Core Objectives

One of AER's efforts this past year was to renew our strategic plan to better align with the development of our organization. We will continue to revise it as our role within the Division of Student Affairs and the University as a whole is clarified. The most recent draft frames this year's annual report.

#### I. Support for organizational effectiveness

AER consults with Student Affairs departments and other campus stakeholders to develop shared strategies to measure goals and use data wisely. Our team manages assessment design, data collection, reporting and communications on strategic objectives and initiatives.

**Alignment with the Student Affairs Strategic Plan:** Generally, the efforts of AER undergird all of the areas of the Student Affairs Strategic Plan, as visualized in the "Assessment and Best

Practices” portion of the plan. This strategic objective is further focused on bolstering the Student Affairs Strategic Plan by using data directly to inform and demonstrate the objectives outlined in the plan.

### Goals and Actions

**A. Provide expertise and management in the development of data elements to demonstrate strategic goal attainment and support data informed decision-making.**

*Ongoing effort.* For the Division of Student Affairs, AER continues to contribute to the Student Affairs Budget Book, particularly related to supporting budget requests and demonstrating impact of funding. For specific departments, AER developed operational dashboards for Campus Recreation and Housing & Residential education that these departments are able to use on an ongoing basis to inform decision-making and resource allocation. For the institution, we led an effort to revise the Graduating Student Survey with our many collaborators to ensure that we were only asking questions that provide useful data to inform strategic goal evaluation and to add select questions where there were gaps in our understanding of the students’ experiences upon graduating. In addition, we presented on the First Destination data collection process and results to the U’s Education Futures and Student Success: Graduate Students committee, with the intent that they could use the information in developing their recommendations.

**B. Develop reports on core topics related to student success from sources of information beyond the student record (e.g. campus climate, engagement and learning).**

*Ongoing effort.* AER’s efforts to analyze, report, and distribute survey results and other key student information include the following:

- Developed the Report on Campus Climate Survey on Sexual Assault and Misconduct, providing insights to campus representatives to prepare for media coverage, and addressing follow-up questions from internal and external constituents.
- Analyzed the HRE EBI results for demographic differences, recognizing the importance of disaggregating data to better understand our marginalized student populations.
- Generated the Admitted Students / Deans Reports, which provide information to Enrollment Management and to each college about undergraduate students who were admitted to the University and did not enroll.
- Presented on particularly relevant results of the National Survey of Student Engagement (NSSE) data at Student Affairs staff retreat.
- Began to draft a report based on the results of the Food Security Survey, which includes information about the level of food insecurity experienced based on the USDA survey.

It is important to note that AER is intentionally moving away from static reports and toward interactive dashboards where feasible, so that data can be accessed more readily by more people to answer complex questions. For example, we have published a portion of the Graduating Student Survey dashboards on our website. Moving forward, we will evaluate each project to determine what formats and tools can be utilized to analyze and publish results.

**C. Manage the assessment cycle and annual reporting process for Student Affairs.**

*Goal met for the year.* The assessment planning process was significantly different leading up to the 2018-2019 year, given the survey software transition and the focus on specific action steps needed

for all departments to be operational in time for the start of the academic year. In reflecting on the change in our process to administer surveys and the leadership changes for the Division, we will shift our planning process to focus on the *types* of data and information that departments have and want to start collecting in the upcoming year, and less on specific project dates and details.

AER also began a more thorough review process for departments' annual reports. We may review and provide feedback to departments, to aid in the process of tying assessment data, annual reports, and budget all together in a meaningful way.

**D. Lead and coordinate program review for student affairs departments to ensure best practices and use of resources.**

*Goal met for the year.* The Division of Student Affairs engaged in the NASPA Advisory Services P.R.A.C.T.I.C.E.S. (Policy, Resources, Academics, Compliance, Technology, Inclusion, Community, Evidence, and Students) review. In addition to the coordination provided by the Director of AER, members of the team responded to the requests for information. The process was completed and the results will be reviewed by the new Student Affairs Leadership Team and then by key departmental stakeholders in the upcoming year.

**E. Facilitate communication and coordinate opportunities internal and external to Student Affairs to optimize resources and develop institutional best practices in service delivery and co-curricular education.**

*Ongoing effort.* AER staff members serve on several committees and participate in conversations related to data governance and data resources: the Student Data Warehouse Management group, the Student Data Warehouse Super-User group, and the Business Intelligence / Data Governance Community. Further, AER staff members provided consultation to Susan Schaefer, a data governance analyst within UIT, to develop a survey to gather data from departments about their current understanding and implementation of data governance best practices.

AER also coordinates the Graduating Student Survey Committee, and we initiated intentional conversations about what data was being collected and not used as well as what different areas wanted to add to the survey and how the information would inform decisions. AER is also represented on the Civitas Illume Communications working group, which develops and delivers “nudge” messages throughout the academic year to targeted groups, in line with best practices related to retention.

**II. Assessment project management**

AER engages in the assessment process from development through analytics and reporting for Student Affairs. Our team provides support on any and all stages of the assessment process, to departments and campus partners, for the assessments conducted to meet multiple needs.

**Alignment with the Student Affairs Strategic Objectives:** Generally, the efforts of AER undergird all of the areas of the Student Affairs Strategic Plan, as visualized in the “Assessment and Best Practices” portion of the plan. This strategic objective is further focused on providing departments what the assessment they need to execute their efforts to provide services and

programs related to student engagement & support, student health & wellness, and inclusivity & equity.

#### Goals and Actions

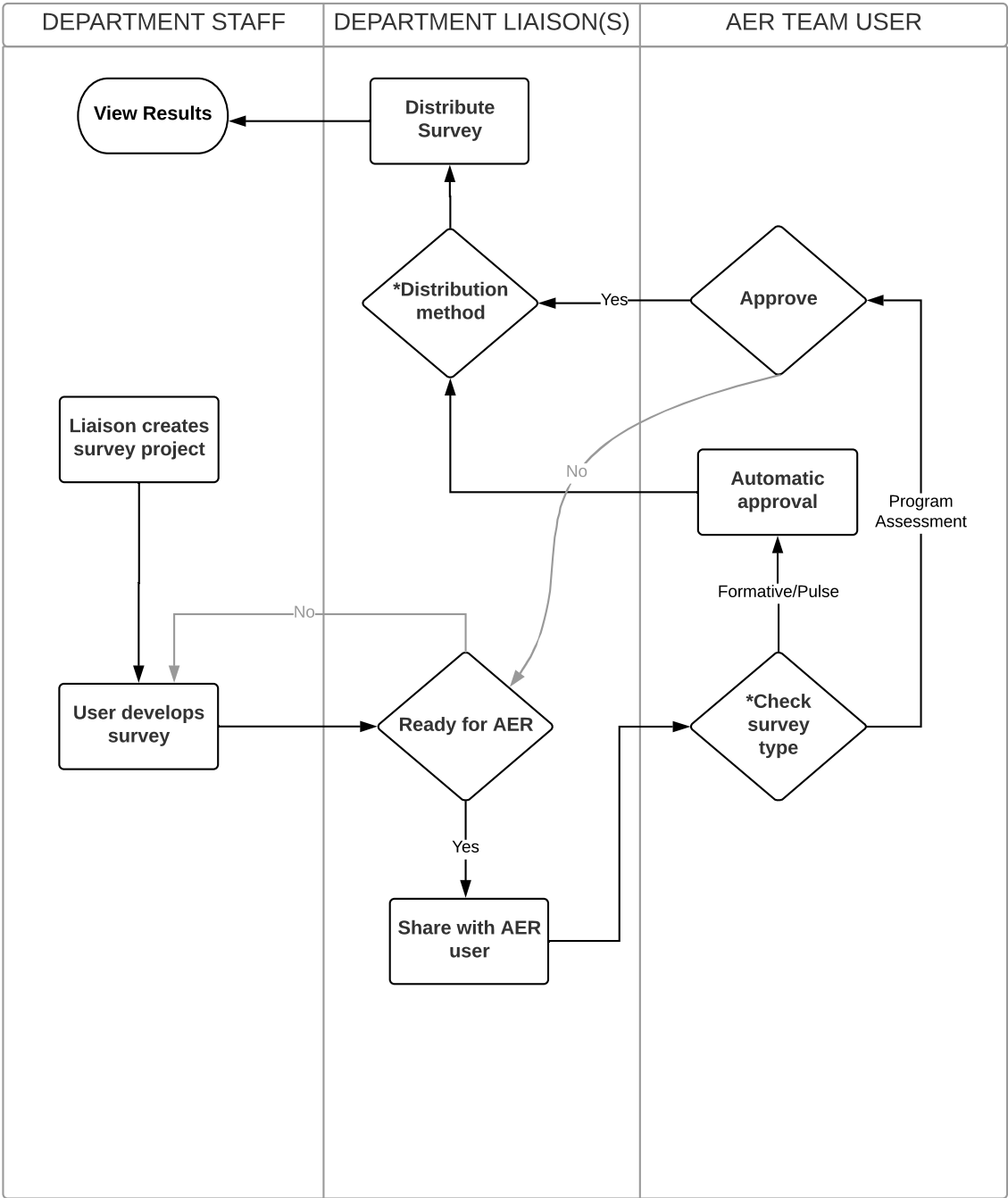
**A. Plan assessment needs and priorities for the Division of Student Affairs and the departments and areas within it, to align with the Student Affairs Assessment Model.**

*On hold for 2018-2019 year, given leadership changes.* As the new leadership team begins, we can gain clearer direction from them regarding where the Division as a whole and each reporting line most need to focus. While the broader prioritization was on hold, we continued to work with departments who have been expanding their utilization data. Within Qualtrics, there were 34 projects that were identified as “kiosks” (primarily intended to collect uNIDs and any other basic utilization data). From those kiosks and also department-specific records (e.g., scheduling software), AER created 33 of the standard utilization reports on student demographics and characteristics. Between these two aspects of utilization data collection, departments are increasingly engaging in collecting this foundational data needed in the Student Affairs Assessment Model.

**B. Provide expertise on assessment content and data collection strategies in order to address logistical aspects, maximize the usability of the data, and follow assessment best practices.**

*Goal met for the year.* With the implementation of Qualtrics and the change in our process for developing and administering surveys, AER had an opportunity to reflect on and then be more intentional about where and how we provide expertise to departments. First, our new process emphasized the departmental liaison as the key person to coordinate assessment and grow expertise within the department. After they’ve worked with any colleagues within their department, then they send the project in Qualtrics to AER for review and approval. See “Student Affairs Qualtrics Process” on next page. With this review process, we spend more time providing substantive feedback rather than needing to coordinate minor logistical details for surveys. Further, Qualtrics has an extensive support site for how to use the tool and set up different features, so we are encouraging users to explore on their own what they need and when they need it, rather than AER replicating Qualtrics’ content and trying to teach the entire platform when elements may be forgotten before there are opportunities to apply it.

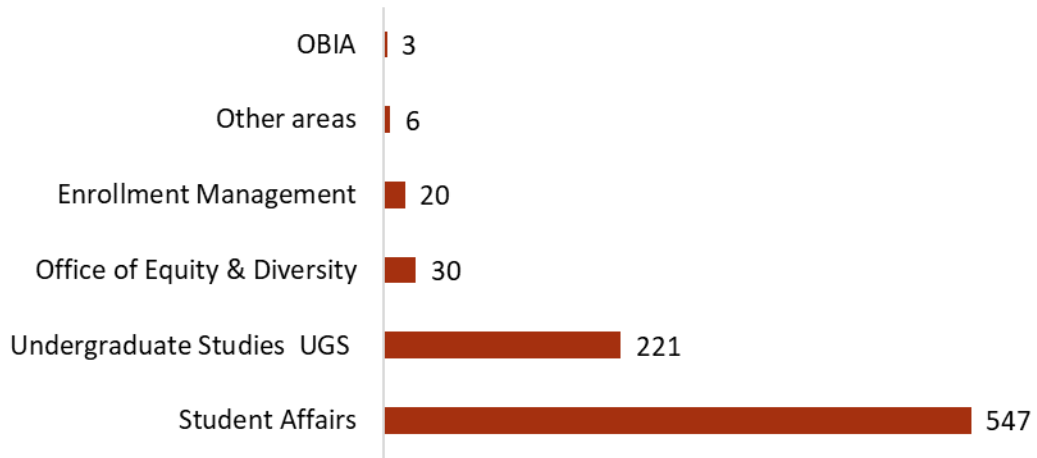
There were 827 total projects built within Qualtrics during the year, with 547 projects within Student Affairs. It is important to note that, in the new model, liaisons can build projects that are ultimately not administered, and many staff members did so in order to test out different features. There were 305 projects in Qualtrics that AER engaged with and tracked, including all of the projects that we reviewed and approved. AER built or provided more extensive support to build 131 of these 305 projects within Qualtrics that were primarily within Student Affairs and/or led by AER (e.g., institutional student surveys). We built many of these surveys when AER was first able to access Qualtrics and while we were developing the process and permissions needed related to other staff having access. We anticipate that this number will be significantly lower in the coming years now that all departments are able to build their own projects.



- \*Distribution Methods**
- Qualtrics mailing using unid@utah.edu
  - Qualtrics app for off-line data collection
  - Generic link distributed outside of Qualtrics
  - Additional methods available with AER consultation

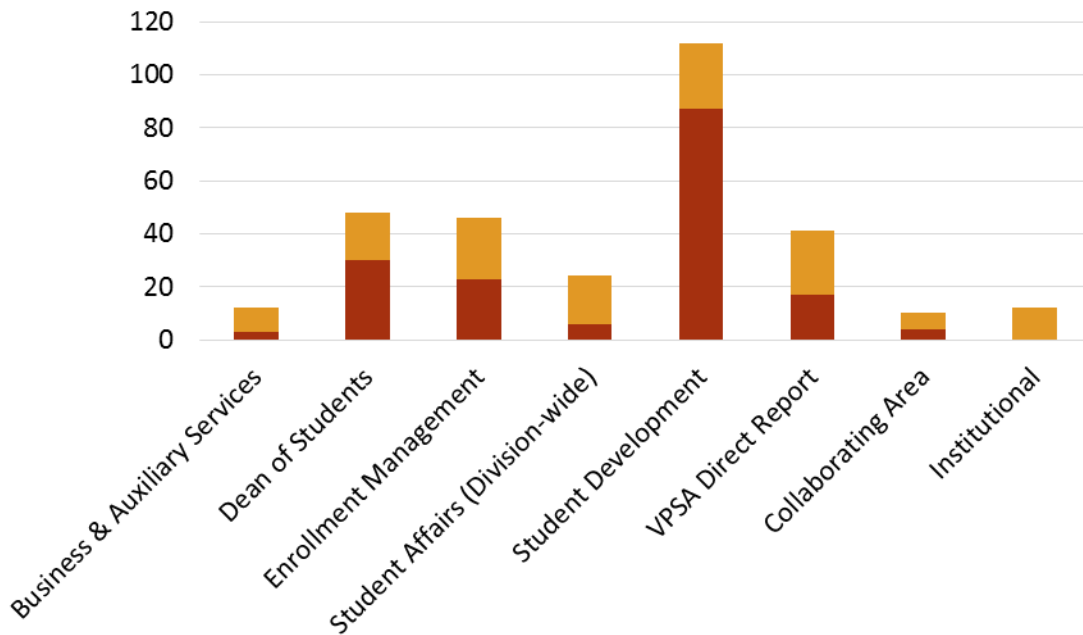
- \*Check Survey Type**
- Formative/Pulse: to make immediate and short-term adjustments
  - Program Assessments: to demonstrate outcomes; anything related to budget

### Number of Projects in Qualtrics



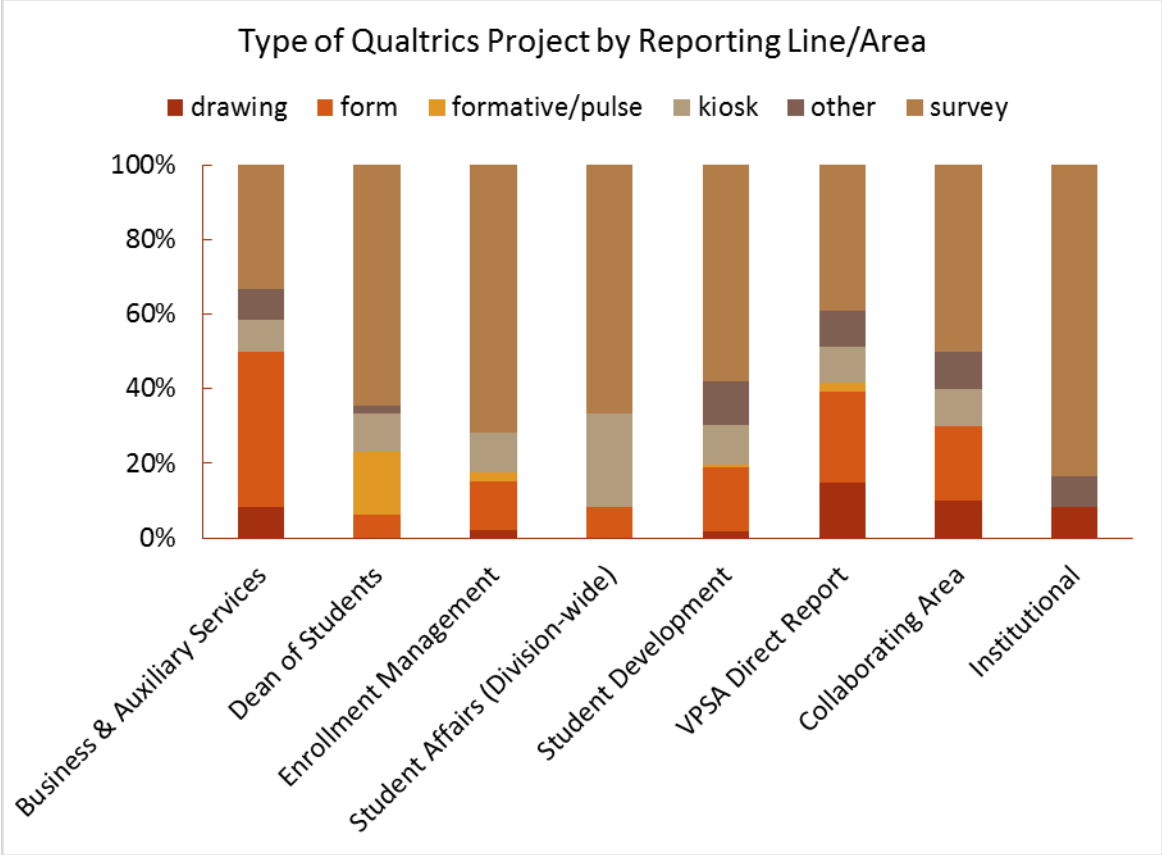
*Note that individuals can create projects that may not be administered (e.g., projects still being developed, projects to test out features), which was not possible in our previous software tool. Thus, counts cannot be compared across years.*

### Student Affairs - Primary Assessment Projects by Reporting Line, **built by AER** or **not built by AER**





In previous years, AER has reported the number of assessment projects. As the scope of our work has changed significantly in the past few years, the meaning of counting the total number of assessment projects (when these projects can range from a very quick review of a survey to developing a dashboard that takes weeks of time to create and revise based on feedback). However, within the 305 Qualtrics projects that AER tracked, we have categorized the type of project. While surveys continue to be our primary project, we have encouraged the use of Qualtrics for “forms” and even provided a specific training on why and how. Forms are typically used more at the individual level (e.g., a request form, an application), but departments can also use them to gather aggregate data. Also, Campus Labs had a separate platform for formative or pulse assessments (assessments that are intended to gather immediate feedback for short-term use, without long-range implications), called Student Response. While Qualtrics does not have a separate platform, we incorporated this type of assessment as a separate process in our flow, so that departments have more flexibility to implement this type of assessment without needing a full review by the AER team. As noted in the previous goal, we have also increased the number of departments who are gathering utilization data, with many departments using Qualtrics to collect student uNIDs and other data points as needed via kiosks (again, same platform in Qualtrics but different process for AER).



- C. Coordinate institutional surveys to students, including developing sampling parameters to meet study needs and reduce survey fatigue.

*Goal met for the year.* AER coordinates institutional and large-scale surveys to students in order to prevent overlap in timing of surveys where possible, create distinct student samples, and reduce the total number of surveys administered where data may already exist. This effort is intended to reduce students' survey fatigue and thus allow stakeholders for various projects (both within Student Affairs and elsewhere in the institution) a greater opportunity for a decent response rate. During the 2018-2019 year, there were 15 surveys on the schedule and AER provided sampling for six of them:

- Cost of Attendance Survey for the University Office of Scholarships and Financial Aid,
- Measuring Information Service Outcomes (MISO) survey for the Marriott Library,
- P-3 Housing Development Survey,
- Food Insecurity Survey for the University Union and other constituents,
- National College Health Assessment (NCHA) (biannual) for the Center for Student Wellness and other constituents, and
- Academic Advising Survey (biannual) for the Academic Advising Center and Undergraduate Studies.

**D. Lead and develop project-specific analytics and reports to complete the assessment cycle.**

*Ongoing effort.* In addition to the reports listed in I.B. and the dashboards AER has developed, we provided 33 of the standard utilization reports that incorporated 91 different programs and services from 12 departments and almost 30,000 rows of student data. Primarily during the 2017-2018 year, AER developed a way to produce these standardized reports more efficiently, and we were able to implement that process fully during the 2018-2019 year, allowing for a much quicker turn-around time. These reports include the total number of participants/attendees, along with the unique number of students, and then all of the following student characteristics

- Gender
- Age
- Residency (in or out of state)
- Race/Ethnicity
- Academic Career (ungrad or graduate)
- Academic Level for undergrads ("year in school")
- College
- Fraternity & Sorority Membership
- HRE Housing resident
- Honors student
- International student
- TRIO participant
- UU employee
- Veteran student

Our primary data analysis project utilized the ACUHO-I/Benchworks Resident Assessment, which HRE administered in Fall 2017. HRE was able to generate standard reports based on the survey results, but the tool did not provided any statistical testing. AER examined seven questions and compared responses based on race/ethnicity, gender, sexual orientation, and international student status. We also provided three-year trend data specifically looking at microaggressions experienced by different student groups.

**E. Provide training on best practices for conducting assessments (e.g., survey development, collecting utilization data).**

*Ongoing effort.* As noted above regarding the transition to Qualtrics, AER staff members developed three separate trainings on different features of the software and offered a total of 14 separate

trainings. In addition, we started offering “Play Sessions” that are almost like open office hours, intended for staff members to drop by and ask any specific questions, explore together, and learn about more complex features that are of interest to them (rather than AER developing content-heavy trainings that may or may not be relevant). These sessions were not particularly well attended, so we also developed a user group email (listserv). The idea again was that people could ask questions and others could respond with tips or ideas. Again we saw minimal engagement, so we will explore other ways that we can encourage users to learn from each other and from the Qualtrics support site.

<b>Training</b>	<b># of Times Held</b>	<b>Total # of attendees</b>
Qualtrics for Liaisons	4	31
Mailings & Trainings	3	21
Qualtrics for Forms	1	15
Play Session	6	18

**F. Increase AER staff resources to meet the increasing demands for our services.**

*Ongoing effort.* With the changes to the Division of Student Affairs and the exit of Enrollment Management, AER will engage in further organizational assessment to determine which resources will be needed to advance our work to support this broad portfolio.

**III. Data and systems management**

AER uses student systems data in addition to student experience data captured through other means, such as institutional surveys, to serve constituents’ reporting needs. AER uses and manages various software for data collection, storage, and reporting in addition to facilitating stakeholder access to these resources in compliance with the Office of the Registrar.

**Alignment with the Student Affairs Strategic Objectives:** Generally, the efforts of AER undergird all of the areas of the Student Affairs Strategic Plan, as visualized in the “Assessment and Best Practices” portion of the plan. This strategic object further emphasizes the collaborative nature of our work, in the ways both that we contribute and that we rely on others.

**Goals and Actions**

**A. Integrate systems to increase autonomy and improve efficiency on collecting data, storing data, and updating dashboards for Student Affairs.**

*Ongoing effort.* AER works with several different software tools on a regular basis, and across the departments within Student Affairs, there are a multitude more. AER is working with the Business Intelligence team within UIT, through our business analyst, to set up technology processes so that data automatically flow from one software to another at set points of time. We are using UIT’s new integration platform called WSO2 and have piloted a few use-cases as development continues on that system.

One such project was the Qualtrics directory automation. In Qualtrics, we are able to have a student directory that stores key demographic information and also tracks information about number of surveys received, response rate, etc. By automating the feed from PeopleSoft to Qualtrics, we are able to have more accurate and up-to-date information within Qualtrics, which can then be used for identifying who should receive a survey, connecting demographics to survey

responses for data analysis and reporting, and more. The major change within UIT to handle integrations through WSO2 resulted in this project taking significantly more time, so we anticipate the automation being finished during Fall 2019. In the meantime, we are able to use some aspects of the automation and complete the rest of the process manually, so that the directory information is fairly up-to-date.

AER also worked with two departments to feed specific data from their systems into the Student Affairs data store and then to Tableau dashboards. Campus Recreation has information about membership and usage in PeopleSoft, and the data feed means that Campus Recreation can see things like how many people are using the building, updated on a daily basis. Housing & Residential Education (HRE) uses StarRez to track applications for housing, room assignments, and occupancy information. With their data feed to Tableau dashboards, they are able to look at student applications and make decisions and adjustments on an ongoing basis. One of the challenges with both of these efforts was that there were sometimes longer delays between when we asked a question or shared an update and when we heard back from them, particularly because the people most familiar with the systems are not the people who will utilize the dashboards for planning and reporting.

**B. Manage user access to AER's software resources such as Qualtrics and Tableau in line with institutional, state, and federal guidelines and requirements (e.g., FERPA) related to access and use of student data.**

*Ongoing effort.* AER implemented Qualtrics and also expanded our use of Tableau significantly (for both staff within Student Affairs and campus partners) in the past year, and with these tools, we spent time to develop processes to grant access, audit users, and change/remove access. We collaborated with colleagues in the Office of the Registrar and on the BI Team to gain from their expertise. We wanted to ensure that we had documented approval from the appropriate director/dean or other people with oversight of the data, that we were clear to the user about the appropriate uses of the data and results and parameters around this, and that we were as efficient as possible on our end so that we are able to add, change, or remove access as quickly as possible. We are also consistently checking that any new users have been FERPA-certified through the Office of the Registrar, as an additional protection for student data.

Specifically, in Qualtrics, we developed an access process and four different levels of access for different types of users (e.g., liaisons have the ability to create projects but other staff members need to coordinate through the liaison to create a new project). AER created 90 accounts within Student Affairs and 33 accounts for collaborators (this number does not count UGS, which is managed effectively independently). For Tableau, we developed an access process for colleges in which the dean could designate appointees one time, and then these appointees can determine the specific people within their college need access to the college-specific dashboards. This process had the advantage that we did not need to wait for the dean for every individual who needed access and yet was flexible enough for very different structures across the colleges. We granted access to these college dashboards (First Destination and Graduating Student Survey) to 31 individuals in 12 different groups. Also for Tableau, we developed an access process for Student Affairs related dashboards and began to implement that process and grant access. Our Tableau site has a total of 77 users and 34 groups currently.

**C. Develop dashboards for AER-managed projects which are accessible by internal and external constituents.**

*Goal met for the year.* We were able to develop and share quite a few dashboards this year, particularly as some dashboards built on already-established dashboards.

- First Destination information (8 total in use) – a public dashboard (primarily targeted for students exploring majors and career paths, on the Career & Professional Development Center website), three primary internal dashboards (primarily to inform program-level and institution-level reporting and decision-making), plus dashboards for TRIO and Honors that mirror the internal dashboards but are limited to the specific populations of interest, and two for reporting (Intuitional Analysis and NACE)
- Graduating Student Survey (9 total in use) – as with the First Destination information, there is a public dashboard, three primary internal dashboards that are based off of closed-ended survey questions, three primary internal sentiment analysis dashboards (which we worked with the BI data scientists), plus TRIO and Honors dashboards for those specific populations.
- Campus Rec (2 primary dashboards developed for use) – student demographics for users and non-users, building use over time
- HRE – application tracking
- Registrar – “Shopping Cart” dashboards (connecting students who had courses in their shopping cart but had not registered, both to student systems information and to the Enrollment Plans survey results)

It is exciting to develop these dashboards, and we have found that even for departments who have a strong desire to use dashboards, there can sometimes be a lag between when we ask for feedback/clarification or provide drafts and when they respond with the direction we need. We need to be intentional about prioritizing dashboards not only that will have an impact in theory but that also have a time commitment from the department when needed.

**D. Implement best practices in alignment with the Business Intelligence (BI) team regarding data collection, storage, reporting, and data governance.**

*Ongoing effort.* There were two primary ways in which we worked with the BI team in the past year: documentation of data feeds & automated cleaning process and determining the best structure for granting access for college faculty and staff to our Tableau site and the student information for students in their specific college. The documentation can take some time, and it is particularly valuable in that we have a trail to understand what data is coming from where and how it has been adjusted (e.g., if we need to re-define a data point) and we can duplicate or reproduce it if needed (e.g., if a staff person is out and an update is needed). Regarding the structure of granting access to Tableau for college users, there were different options that had different advantages and limitations, so it was important to think through the implications and determine the process that would work the best.

In addition to these primary ways we collaborated with the BI team, we also met with their data governance specialist and learned how to use the “Data Cookbook,” a software tool intended to define, approve, and distribute definitions for data points.

We have also continued to develop and document the process of cleaning First Destination information. This information comes from multiple sources and requires extensive cleaning before meaningful results can be reported. This process includes translating results from other sources into a consistent format, cleaning individual data points where students entered inaccurate or incomplete information (e.g., the spelling and abbreviation of cities), and determining which data

points to save if there are more than one response for one student. We hope to work on automating more of these cleaning steps in the upcoming year, and the documentation that we have already developed for the manual process will help significantly in implementing an automated process.

#### IV. Staff Excellence

The AER team strives to increase our knowledge of best practices and implement these in our work to serve our constituents in a professional and competent manner.

**Alignment with the Student Affairs Strategic Objectives:** Generally, the efforts of AER undergird all of the areas of the Student Affairs Strategic Plan, as visualized in the “Assessment and Best Practices” portion of the plan. This strategic objective is also closely aligned with the “Staff Excellence” area of the plan, with specific goals and actions paralleling the specifics contained within this area of the Student Affairs Strategic Plan.

#### Goals and Actions

**A. Each professional staff member will belong to at least one professional organization relevant to their role as a member of the AER team.**

*Goal met.* Stacy, Elizabeth, and Dane are all members of NASPA and the Assessment, Evaluation and Research Knowledge Community (AER KC), in addition to other KCs of interest to each staff person. Stacy completed her term as the National AER KC co-chair and will remain on the board for two years as Recent Past Chair. Elizabeth is an active member and chair of the Structured Conversations tactical team as part of the Professional Development Committee of the Student Affairs Assessment Leaders (SAAL) organization.

**B. Each team member, in consultation with their supervisor, will create a professional development plan to promote individual skill development through continued education to increase AER team capacity to serve our constituents.**

*Goal met.* Elizabeth, Dane, and Amanda all submitted professional development plans for the year that outlined the goals for the year and what training and support they needed to meet these goals. These plans were used to inform professional development funding.

**C. Each team member will have an annual performance evaluation.**

*Goal met.* Elizabeth, Dane, and Amanda all had a performance evaluation in which both they and their supervisor(s) identified strengths and areas of growth.

**D. The AER team will contribute knowledge to the field of assessment and data analytics in higher education, through professional presentations, publications and leadership.**

*Goal met.* Staff members gained further training through conference attendance and served in multiple leadership and service roles for professional organizations. See details below in specific “Staff Excellence” portion of the annual report.

## Plan for the Future

### Anticipated Challenges and Opportunities

One challenge and opportunity will be to continue to enhance the use of Qualtrics both within our department and with all users. Generally, this effort will require a significant time commitment as we test features, develop new processes, and provide trainings. There are two primary features we will focus on in the upcoming year: ticketing and dashboards. The ticketing feature allows a way to assign and track follow-up actions based on survey or form responses. For example, if a student requested assistance via a form in Qualtrics, then it could be assigned to a staff person and the staff person could document the action steps they take to resolve the student's issue. Dashboards within Qualtrics allow for interactive filters and access that is separate from the original project. Part of the concern with these features is the amount of time that AER may need to dedicate to managing user and team permissions in order for these features to be used widely. We hope to have a couple of departments pilot the ticketing feature in particular, with the intent that we will provide them more support and we will also expect more information back from them about what worked and what did not. We are also discussing creative ways to share the responsibilities so that it does not all fall on one AER staff member. Regardless of the specifics, we look forward to maximizing the advanced features of Qualtrics to better collect, analyze, and report data and improve efficiencies.

AER has greatly expanded the dashboards we have available on our Tableau site and the number of people who have access to use these dashboards, as described above. In the upcoming year, there are exciting possibilities to continue to grow, and we will need to be intentional about where we focus our efforts with 1) building new dashboards based on priorities of the leadership, 2) sharing current dashboards with new users (e.g., meeting with additional colleges to share the information on graduating students), 3) creating processes for access and auditing that ensure the correct people have access and that others do not, and 4) doing all of these things as efficiently as possible so that it is not burdensome for AER staff or for our users. We have talked about creating something like a "decision tree" to help us and our collaborators decide whether a report or analysis request would be best met with the dashboard tool within Qualtrics, by AER creating Tableau dashboards, or AER conducting statistical analyses outside either software program. In this vein, we will also need to consider what staff members in other departments may be able to do independently and how AER staff members' time is prioritized based on requests that have higher need and/or higher impact.

On a related note, another challenging opportunity that is particularly relevant in the upcoming year is to establish the parameters of our service to the greater University community. With an emphasis on "One U" and with responsibilities we have fulfilled for the University, we know we will continue to engage in assessment efforts broadly. However, we also recognize that time spent on these efforts is time not spent serving departments within Student Affairs and the Division of Student Affairs as a whole, and we do not have unlimited staffing resources. We will need to find innovative ways to collaborate with our partners in which we are working together to gather data and use it to increase student success and improve the student experience, in a way that limits the amount of time we are spending addressing requests or contributing to efforts that are outside the realm of Student Affairs.

One specific element of this issue is the move of Enrollment Management to outside the Division of Student Affairs. In the past year, we provided some support related to survey development and administration, as well as data analysis and reporting particularly in the first part of the fiscal year. In the

coming year, the new Senior Associate Vice President for Enrollment Management will determine his needs related to assessment and data management and build his team. The way that AER supports Enrollment Management and the departments within it will necessarily change, and while we will not provide our services in the same capacity that we have, we want to develop partnerships with these colleagues and establish parameters for responsibilities that may seem to overlap at times without duplicating work or missing valuable opportunities to address assessment needs.

An overarching challenge/opportunity is the shifting work and responsibilities of AER. Over the past few years, we have already changed significantly. This past year, the implementation of Qualtrics resulted in a considerable reduction in the amount of time that AER needs to spend on the logistics of building a project, which freed time to focus on the survey design and other efforts (which was appreciated when we were short-staffed). The addition of a business analyst complemented our previous efforts by being able to do more with data storage and “big data” to provide dashboards in particular. This position will also allow us to automate data cleaning processes that have been manual to date, again resulting in the ability to shift time spent. Based on national trends, we will likely find value in strengthening our relationship with the Business Intelligence Team and utilizing their expertise for efforts such as machine learning (which provides a way to analyze massive amounts of text responses to survey questions, for example). At the same time, we do not want to overlook or neglect more traditional assessment efforts. With a renewed emphasis on accountability, the departments within Student Affairs will need to “up their game” related to demonstrate impact through student learning outcomes, and AER has skills to contribute to these efforts. These very different roles present a challenge in finding and retaining staff members who bring a depth of expertise while also being flexible and having or growing a breadth of knowledge about the assessment process that is needed for all of our staff members to be able to support each other. Yet, this challenge also means that we have the opportunity to form and maintain a diverse team of staff with different perspectives that complement each other, as we continue to provide assessment services to the Division of Student Affairs.

### Grants and Contracts

None received for 2018-2019.

### Gifts/New Revenue

None received for 2018-2019.

## Staff Excellence

### Awards and Recognitions

<u>STAFF</u>	<u>AWARDS AND RECOGNITIONS</u>
Last name, First name	Award title, from Example Organization
Duszak, Elizabeth	Vice President for Student Affairs Award for Service Excellence, from UU Student Affairs

### Committee Memberships

*Please indicate whether the committee is Student Affairs (SA), U of U, or an external group/organization (e.g., professional organization) along with the committee name. If you have a leadership role on the committee, please indicate so in parentheses.*



<u>STAFF</u>	<u>COMMITTEE</u>
Last name, First name	SA Committee 1 Name NASPA Committee 2 Name (Chair)
Ackerlind, Stacy	<ul style="list-style-type: none"> <li>• Student Affairs Leadership Team (SALT)</li> <li>• UU NWCCU Accreditation Core Team</li> <li>• UU Education Futures and Student Success: Graduate Students Committee</li> <li>• UU Graduating Student Survey Assessment Team (Chair)</li> <li>• UU Student Data Warehouse Management Team</li> <li>• UU Civitas Illume Communications Work Group</li> <li>• NASPA Assessment, Evaluation and Research Knowledge Community Board (National) (Co-Chair / Recent Past Chair)</li> </ul>
Duszak, Elizabeth	<ul style="list-style-type: none"> <li>• Student Affairs Diversity Council</li> <li>• Student Affairs Student Leadership and Employment Task Force (Co-Chair)</li> <li>• UU Graduating Student Survey Assessment Team</li> <li>• UU Student Data Warehouse Super-User Group</li> <li>• Student Affairs Assessment Leaders (SAAL) Professional Development Committee (chair of Structured Conversation tactical team)</li> <li>• NASPA Excellence Awards Selection Committee</li> </ul>
Luby, Dane	<ul style="list-style-type: none"> <li>• UU BI Team Code Team</li> </ul>
North, Amanda	<ul style="list-style-type: none"> <li>• Student Affairs Non-Exempt Staff Retreat Planning Committee (co-chair)</li> </ul>

### Presentations and Publications

*Please indicate any presentations at **regional or national professional conference or meetings**, as well as journal publications. **Please do not include on-campus presentations to other departments**. Please use APA format for all citations. Bold names of staff members in your department.*

**Ackerlind, S., Duszak, E., Howa, H., & Luby, D.** (2019, June). *Data analytics for student affairs: Developing a foundation for organizational effectiveness*. Pre-conference workshop at the NASPA Assessment, Persistence, and Data Analytics Conference, Orlando, FL.

**Duszak, E.** (2019, April). *Rise up and get involved: Leadership development outside of your role*. Panel discussion at the Utah Women in Higher Education Network (UWHEN) Leadership Conference.

### Faculty Appointments

<u>STAFF</u>	<u>POSITION</u>	<u>ACADEMIC DEPARTMENT</u>
Ackerlind, Stacy	Adjunct Assistant Professor	Educational Leadership & Policy

## **Additional Information**

- i. Professionalism (conferences attended; other training that supports the mission of your department)
- ii. Recruitment and retention of highly qualified staff
- iii. Retirements, new hires, accomplishments, committees, awards. . .anything you deem important!

Dr. Stacy Ackerlind has served as the Director for AER since 2006 and as the Special Assistant to the Vice President for Student Affairs since 2012. Dr. Duszak has served as the Assistant Director for AER since 2015 and was promoted to Associate Director in 2018. The Assessment Analyst position was reconfigured as a Business Analyst position and Dane Luby was the inaugural hire and has now had his one-year anniversary. Chuck Masoka's position as Information Coordinator was discontinued because of the need to scale up implementation of Academic Works and have him report fully to the University Office of Scholarships & Financial Aid instead of .5 FTE to AER. The .5 FTE was converted to a Graduate Assistant role to support survey development and utilization data collection efforts, and Yotam Livnat filled this role for the 2018-2019 academic year.

**Conferences attended:** Stacy Ackerlind, Elizabeth Duszak, and Dane Luby attended the Qualtrics Summit in Salt Lake City in March. Stacy attended the NASPA Annual Conference in Los Angeles, CA, in March. Elizabeth attended and participated in a panel at the Utah Women in Higher Education Network (UWHEN) Conference in St. George in April. Stacy served as a panelist for the Textbook Affordability Conference in Minneapolis, MN, in April. Dane attended the Higher Education Data Warehousing Forum in Ann Arbor, MI, in April. Stacy, Elizabeth, and Dane were all able to attend the NASPA Assessment, Persistence, and Data Analytics Conference, part of the NASPA Conferences on Student Success in Higher Education, in Orlando, FL, in June. Tom Howa, the Associate Director of Business Intelligence within UIT, joined us and we presented the inaugural data analytics workshop for the AER KC as a half-day pre-conference session.