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# Focusing Your Efforts on Tasks that Matter

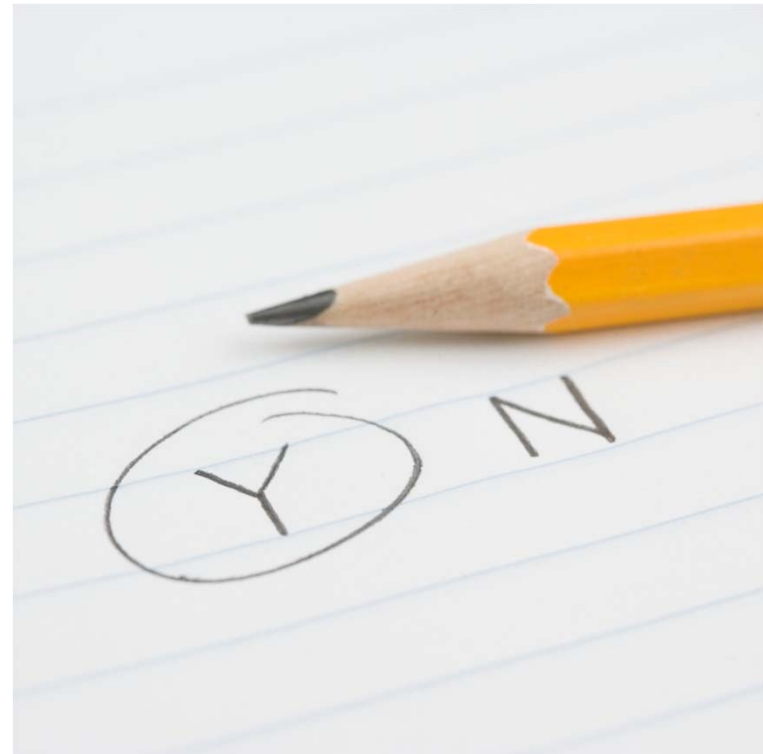
Erin Hansman, Rebecca Wood, Amanda Saw, and Jarisia Latham

November 21, 2013



### You may be interested in this session if...

- You are new to IR
- You are a “one-person shop” or a small office
- You have a lot of work on your plate, and you’re not quite sure where to begin
- You want to see how other offices prioritize and handle ever-changing workloads



### □ We're discussing seven questions:

1. What is most important for **your** college or university?
2. What data could help you make decisions in these areas?
3. How will you collect the data while ensuring its accuracy?
4. How do you incorporate external surveys into results and final reports?
5. How will you ensure reports accurately convey the results of surveys?
6. How will you present these results to others?
7. How do you refine and improve the process for the future?



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Question One

**WHAT IS MOST IMPORTANT FOR  
YOUR COLLEGE OR UNIVERSITY?**

**So many decisions. Never enough time.**

**How do you decide what is important?**

- Mission
- Vision
- Strategic plan
- Other initiatives





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Question Two

**WHAT DATA COULD HELP YOU  
MAKE DECISIONS IN THESE AREAS?**

## Beyond Retention and Graduation

- Student engagement
- Satisfaction and perceptions of students, faculty, and employees
- Trends
- Significance



## Potential Sources of Data



- Institutional databases
- Course evaluations
- Surveys
- Interviews and focus groups
- Financial aid data
- IPEDS
- Program review data
- Other sources?





Question Three

**HOW WILL YOU COLLECT THIS DATA  
WHILE ENSURING ITS ACCURACY?**

## Context, Context, Context!

- Get up close and personal
- Talk to those in the field
- Understand purpose
- Get a grip



## Connect Back to Goals



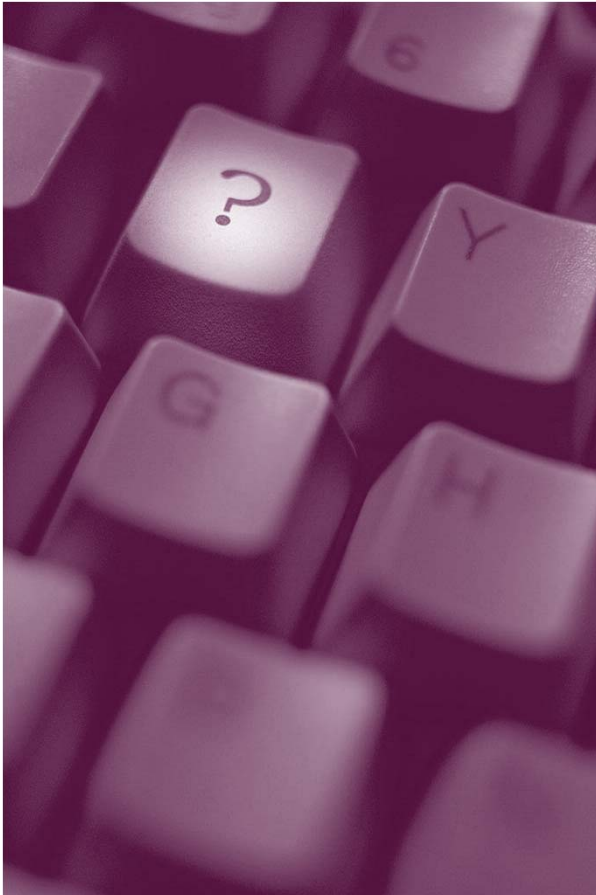
- ❑ Match task to tool
  - Focus group
  - Interview
  - Literature review
  - Database pull
  - Surveys

## QA and Checklists

- Survey distribution lists
- Data screening and analysis



## Survey Best Practices: Purpose



- Determine types of questions
- Who will be surveyed?
- How will the results be used?

## Survey Best Practices: Survey as Conversation



- Must consider the audience
- Social norms and cognitive processing
- Building trust and interest
- Survey questions

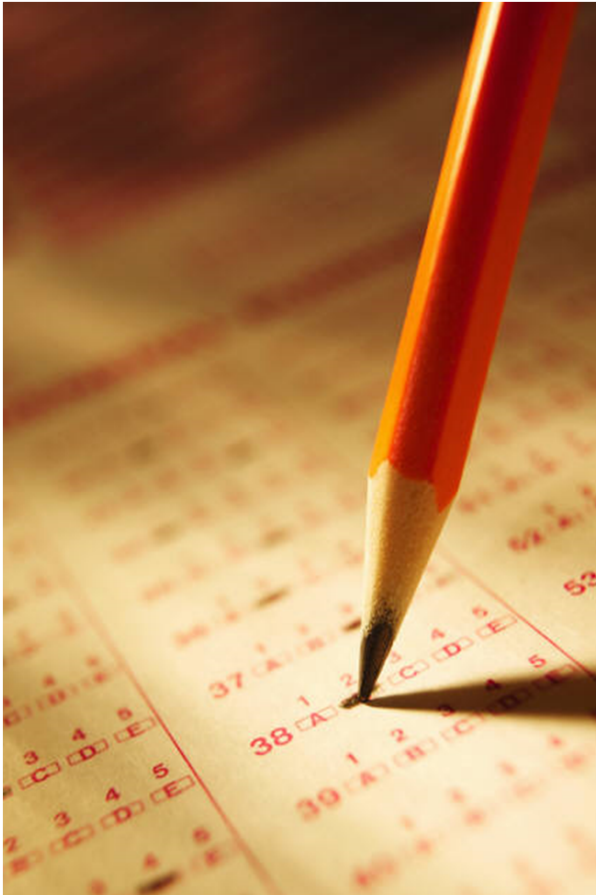
## Survey Best Practices: Maximize Response Rate



- Cover letter
- Timing
- Good design



## Survey Best Practices: Administration



- Test drive
- Refine as necessary





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Question Four

# **HOW DO YOU INCORPORATE EXTERNAL SURVEYS INTO RESULTS AND FINAL REPORTS?**

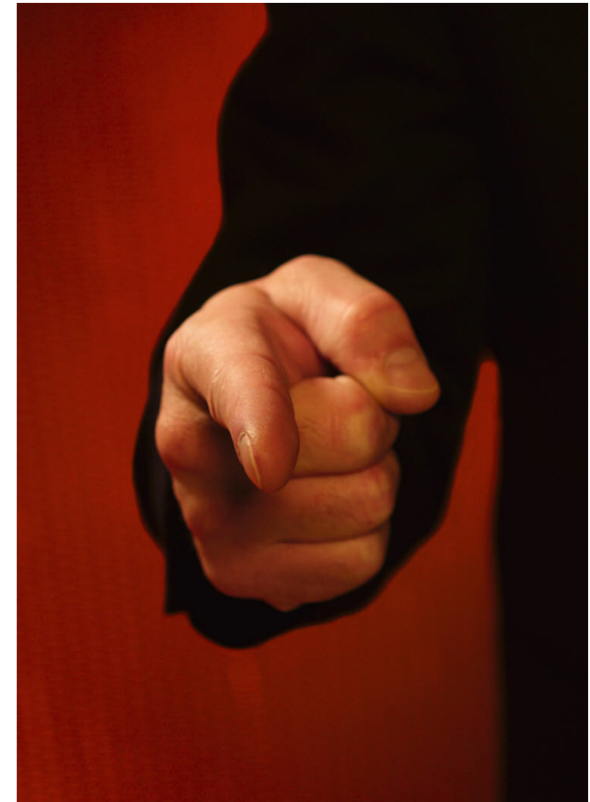
### Examples of External Surveys

- National Survey of Student Engagement (NSSE)
- Noel-Levitz
- Your First College Year (YFCY)

What about **your organization**?

Do you participate in other surveys?

Which ones?



### Typical Uses of External Survey Results

- See how and where your results align with national results.
- Review how individual colleges within your institution are performing.
- Identify area(s) where you are “ahead of the curve” or where improvement can be made.

### **Customizing external surveys may allow you to:**

- Add questions specific to organizational objectives
- Include demographic questions
- Customize email correspondence
- Tie results back to students
- Distinguish results between groups
- Tailor comparison groups
- Form consortia
- Incorporate results with internal data

**Not sure if you can customize? Just ask your vendor.**

### Incorporating external survey data with internal data provides many opportunities:



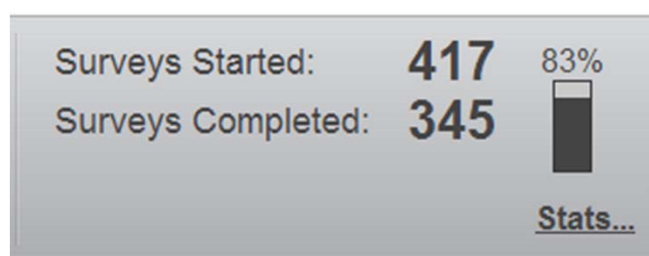
- Identify common themes
- Help with accreditation measures
- Examine department effectiveness
- Support program reviews
- Support strategic planning initiatives
- Develop or improve services
- Find patterns/trends over time



Question Five

**HOW WILL YOU ENSURE REPORTS  
ACCURATELY CONVEY THE RESULTS  
OF SURVEYS?**

## Data Accuracy Challenge 1: Which responses should be included in reports for ongoing surveys?



Do you plan to enroll at the university after attending \_\_\_\_?

| Answer       | Response | %    |
|--------------|----------|------|
| Yes          | 821      | 90%  |
| No           | 36       | 4%   |
| I'm not sure | 55       | 6%   |
| Total        | 912      | 100% |

I feel attending \_\_\_\_ is a good use of my time.

| Answer            | Response | %    |
|-------------------|----------|------|
| Strongly Agree    | 423      | 47%  |
| Agree             | 360      | 40%  |
| Disagree          | 74       | 8%   |
| Strongly disagree | 44       | 5%   |
| Total             | 901      | 100% |

- Consistent sample on all questions
- Possible exclusion of responses to some questions
- Response rate calculation

## Data Accuracy Challenge 1: Which responses should be included in reports for ongoing surveys?

### Implement consistent procedures for response selection

- Depending on the survey software you may be able to:
  - Set an expiration date for survey links
  - Set expiration dates for surveys



## Data Accuracy Challenge 1: Which responses should be included in reports for ongoing surveys?

- Design a method to track which responses meet criteria for inclusion in a report
  - Depending on the survey software you may be able to:
    - Add field with survey close date or time period (e.g. Fall 2013)
    - Create a copy of the survey for each time period or create response sets

### Data Accuracy Challenge 2: How do I ensure my interpretations of the data are accurate?



- ❑ Consult with those involved in the process when findings don't make sense
- ❑ Avoid biased words (only, many, some)
- ❑ Become an expert on student policies, initiatives, and services relevant to the survey

### **Data Accuracy Challenge 3: How do I ensure the report is accurately interpreted by the audience?**

- ❑ Ongoing education campaign with stakeholders on survey methods
  - Information sessions about how to interpret results (e.g. sample vs. population)
  - Data dictionaries with definitions of key terms
  - Results presentations and Q&A before distributing printed reports



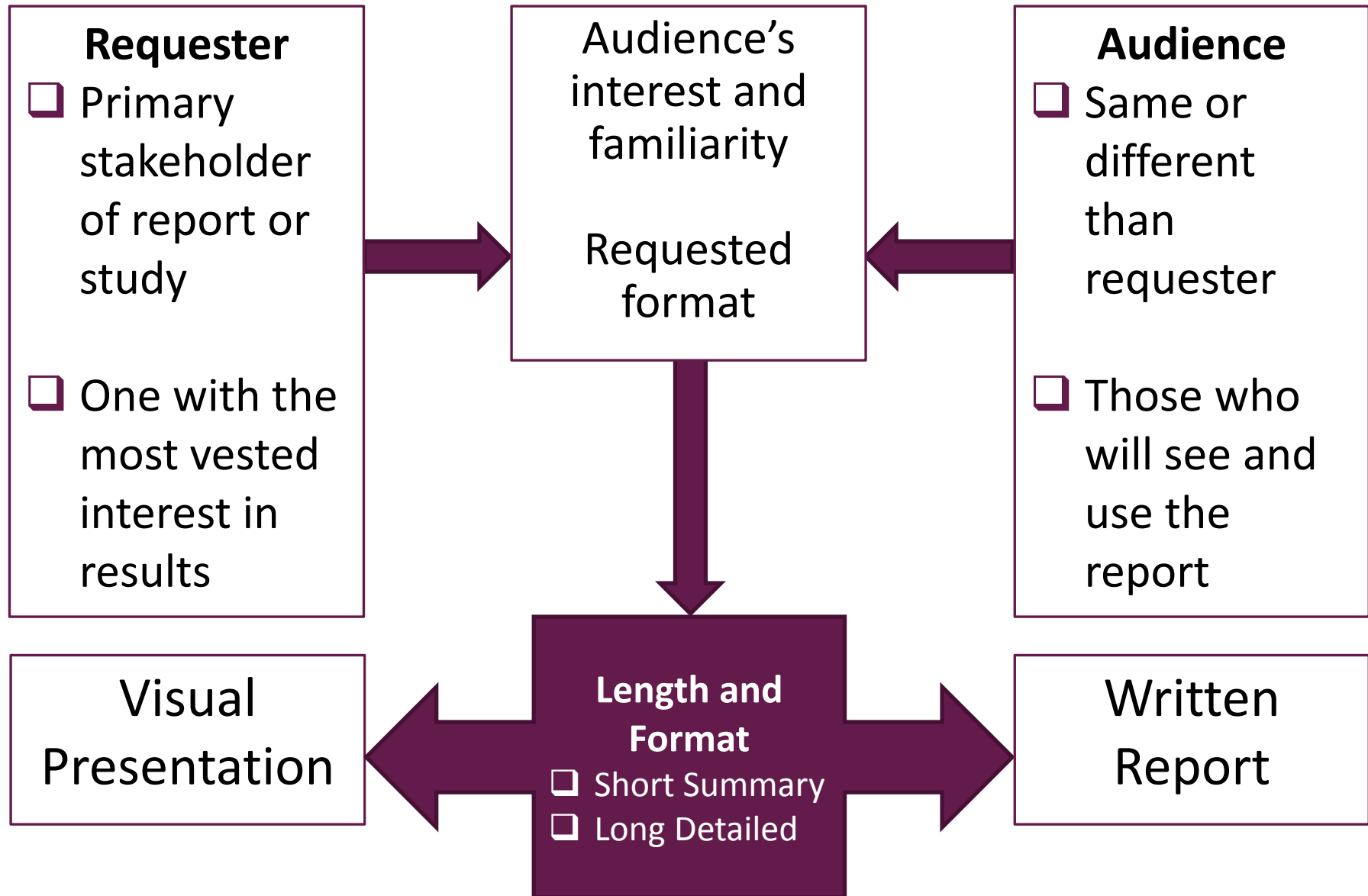
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Question Six

**HOW WILL YOU PRESENT THESE  
RESULTS TO OTHERS?**

## PRESENTING RESULTS: PRIMARY CONSIDERATIONS



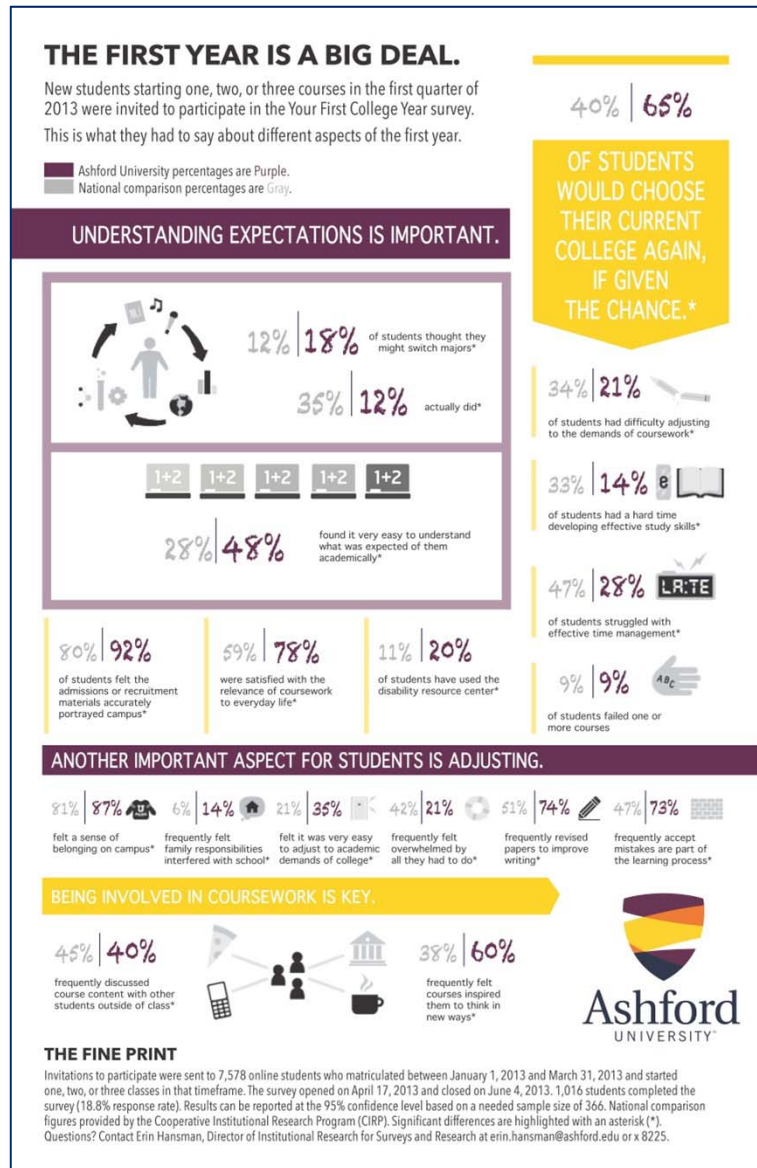
**People tend to remember only about 50% of what they see, but 70% of what they discuss (Sanders & Filkins, 2009; Few, 2009).**



### **Using multiple distribution methods makes results more memorable for decision-making:**

- Provide a brief short form along with a longer format.
- For presentations, involve the audience in the discussion.
- Keep it simple for users to see and understand the information.

# PRESENTING RESULTS: VISUAL PRESENTATIONS



## Short Form Example: Infographic

- Pro: Brief Summary
- Con: Misinterpretation





## Long Form Example: PowerPoint Presentation

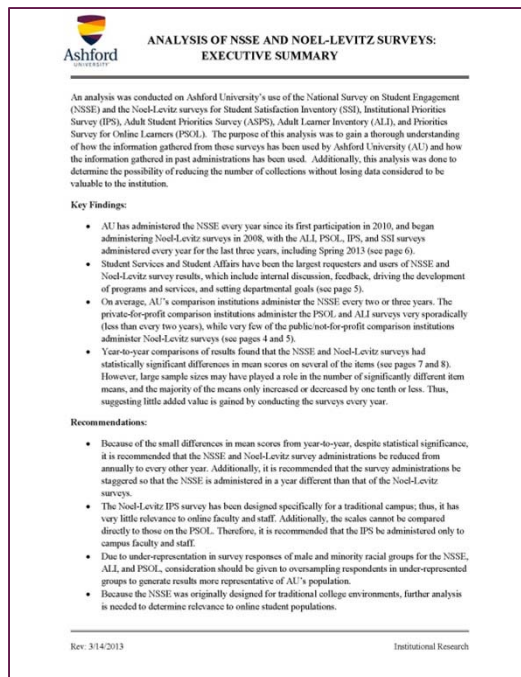
- Pro: Combines visual and context
- Con: Possible information overload

# PRESENTING RESULTS: MANUSCRIPT REPORTS



## Short Form

☐ Executive Summary



## Long Form

☐ Formal Report



## Dashboards: Interacting with Data

- Tables
- Graphs
- Maps



### □ Dashboard Pros:

- Web access
- Interactive for end users' needs
- Current data on demand
- Reduces time for recurring reports
- End users can export data in variety of formats

### □ Dashboard Cons:

- Expense of software
- Training and retraining
- Periodic data updates and maintenance
- Keeping access permissions up to date



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Question Seven

**HOW DO YOU REFINE AND  
IMPROVE THE PROCESS FOR THE  
FUTURE?**

# Continuous Improvement Rules!

## Three Steps for Continued Success

- Debrief and lessons learned
- Keep documentation and checklists updated
- Always strive for better: never settle



### References

- ❑ Few, S. C. (2009). *Now You See It*. Oakland, CA: Analytic Press.
- ❑ Sanders, L. & Filkins, J. (2009). *Effective Reporting*. Tallahassee, FL: Association for Institutional Research.



**Thank you for attending our session!**

**Questions?**