Promoting Efficiency and Quality: Standardized Reports and Data Request Workflow

Janet Flores

2014 TAIR Conference

February 19, 2014

Objectives

- **Calendar of Standard Reports**
- **Workflow Process**
  - Approval Process
  - Ticketing Procedure
  - Review Process
- **Electronic Filing System**

Lone Star College System

Over 76,000 credit students in Fall 2013
Six main campuses
Six centers
Two University Centers
Eleven ISDs in service area
62% Female
37% White, 19% Black, 30% Hispanic
36% between 20 and 24

LONE STAR COLLEGE SYSTEM

North Harris Campus

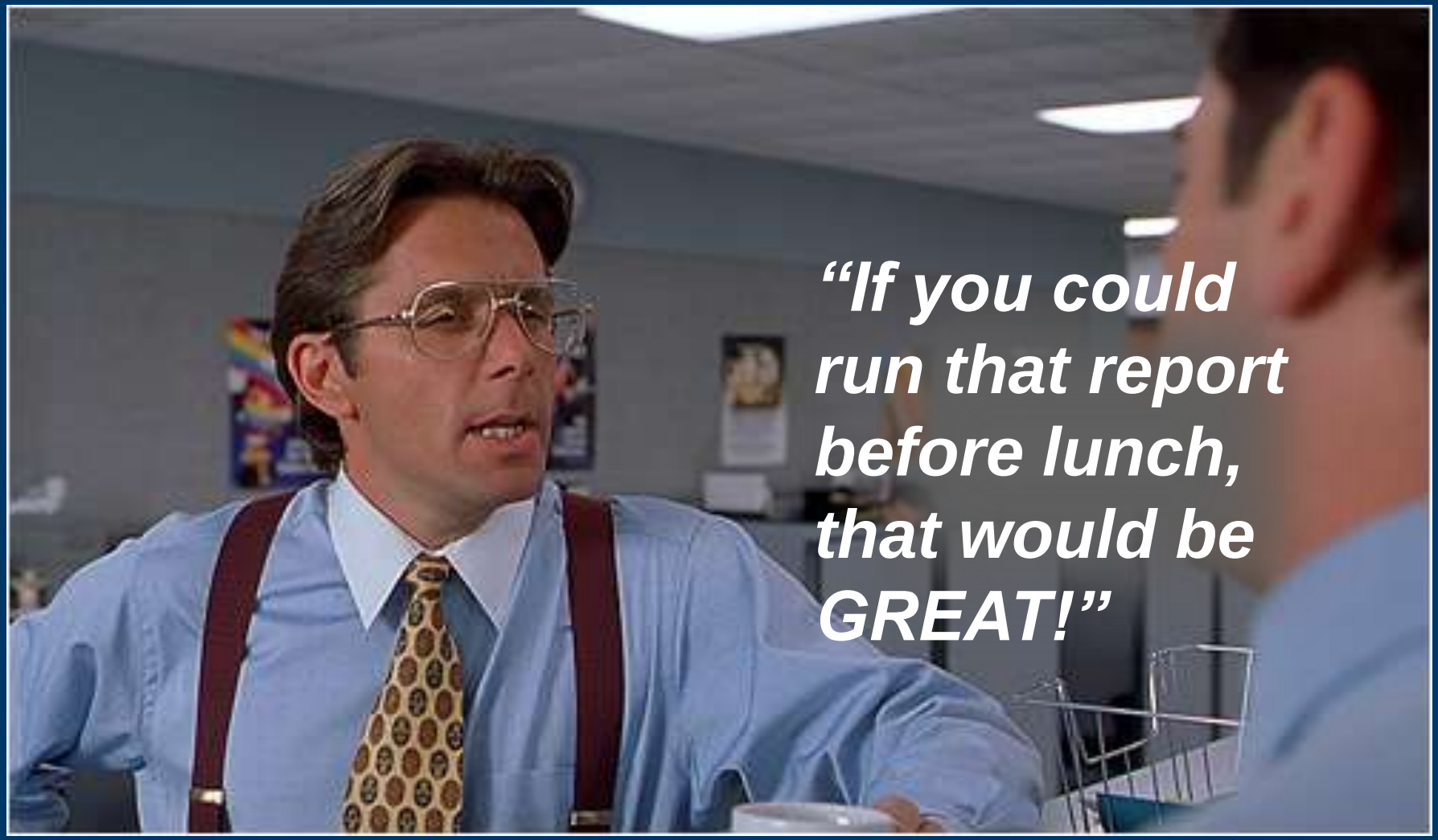
Kingwood Campus

LONE STAR COLLEGE SYSTEM

CyFair Campus

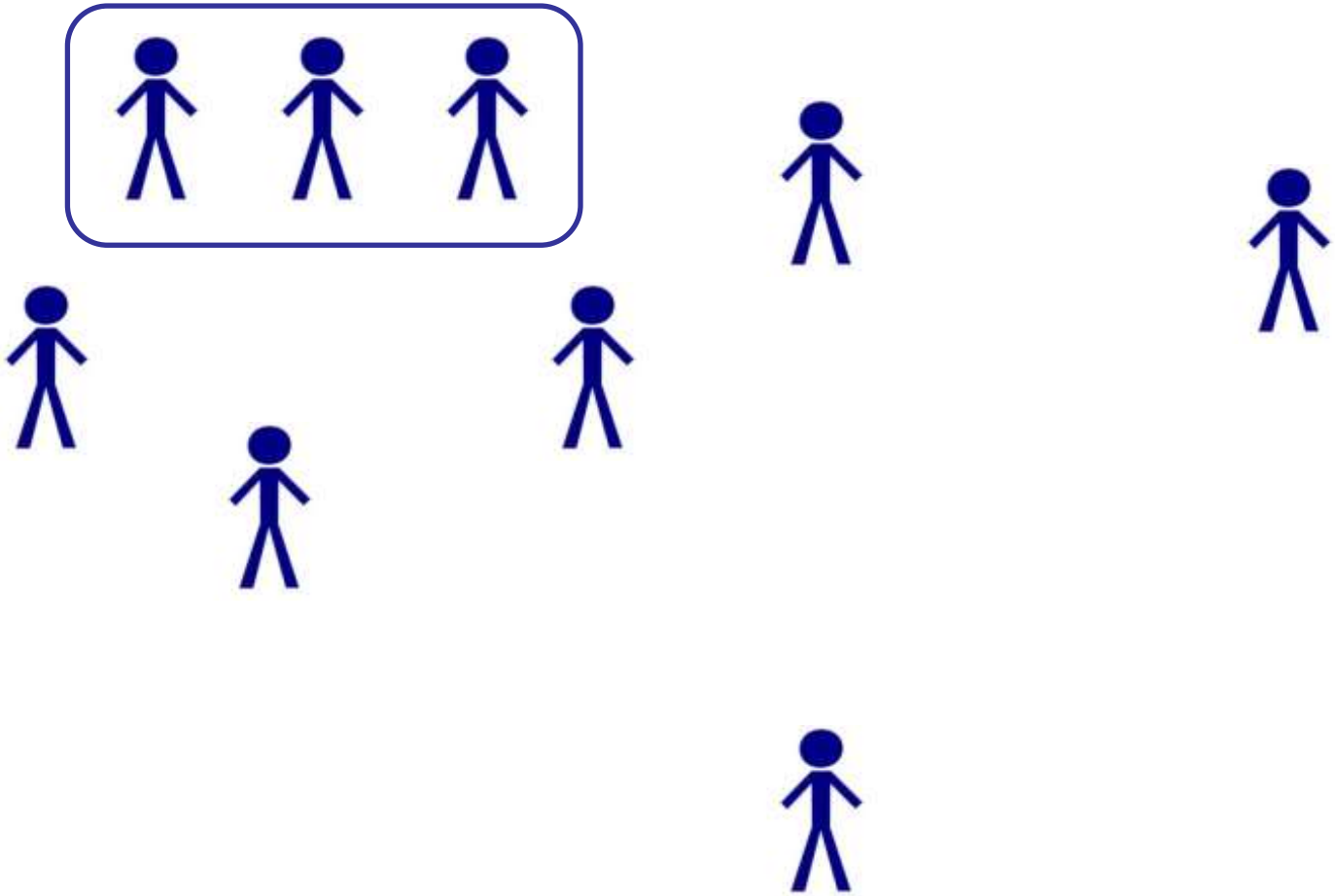
Conroe Center

Client Expectations

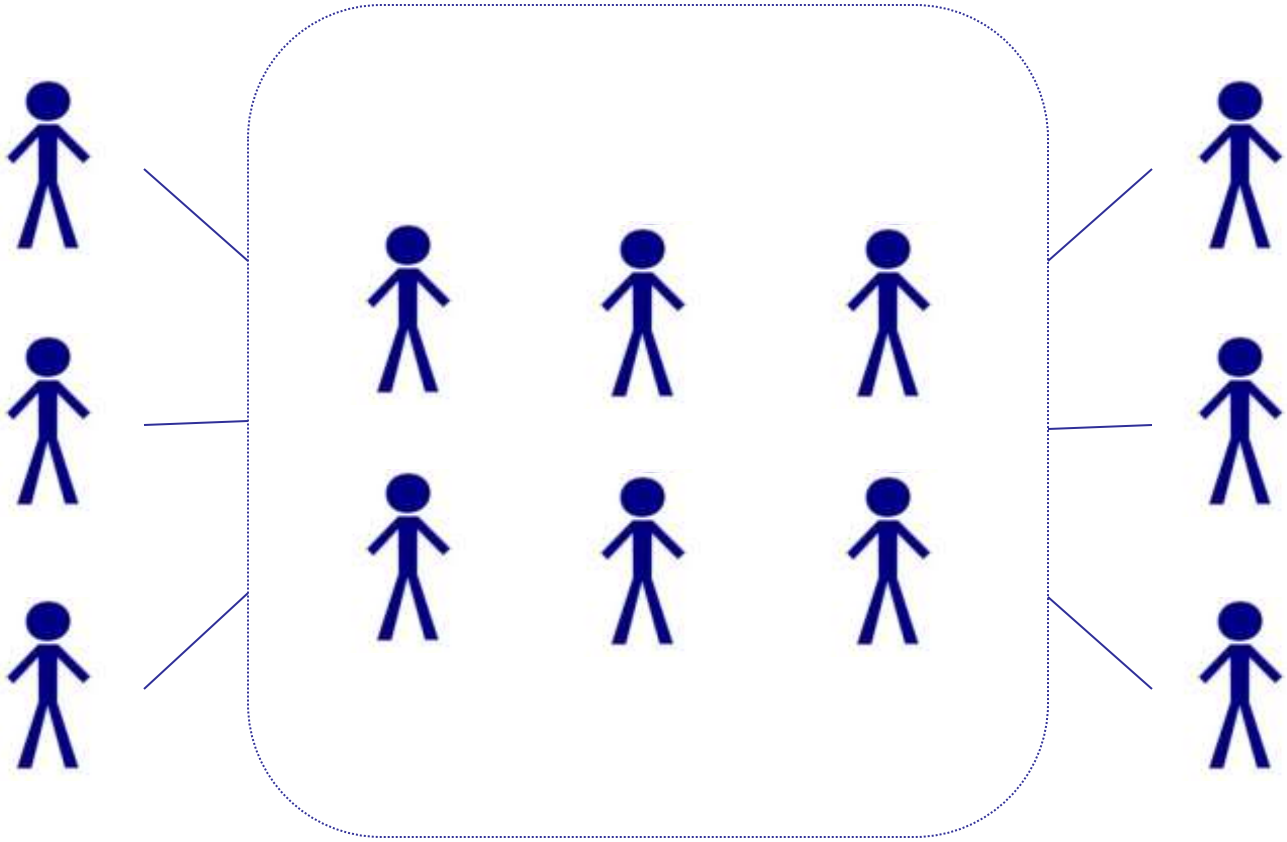


If Only It Were This Easy

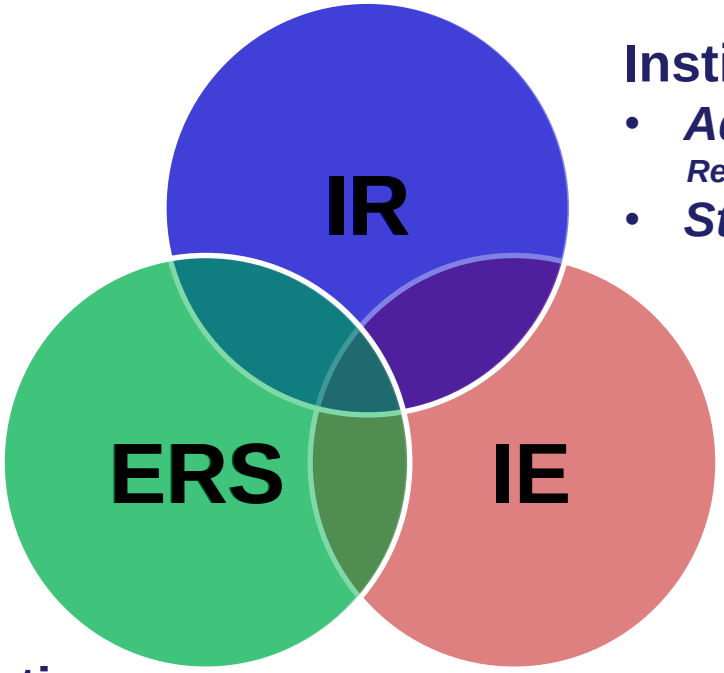
That Was Then . . .



. . . This Is Now



ORIE Structure and Tasks



Institutional Research

- *Ad Hoc Reporting*
  Report generation & interpretation
- *Standardized Reporting*

Enterprise Reporting

- *State Reporting*
- *Dashboards*
- *Automated Reporting*

Institutional Effectiveness

- *SACS*
- *Continuous Improvement*
- *Student Learning Outcomes*

Mission of ORIE

Promote a culture of continuous improvement and data-informed decision making

- Leading the institutional planning, assessment, and effectiveness processes
- Providing timely, accurate, objective, and clear reporting to internal and external stakeholders
- Coaching stakeholders for report interpretation and context
- Collaborating with other institutions in pursuit of best practices in planning, assessment, and institutional research

Set a Goal

Goal

Think Proactively and Act Intentionally

Make a Plan

Those who fail to plan,
plan to fail.
--Winston Churchill

Planning and Organization

- *Be One Step Ahead*
- *Be Consistent in Your Reporting*
- *Be Organized*

Lone Star College System

Be One Step Ahead

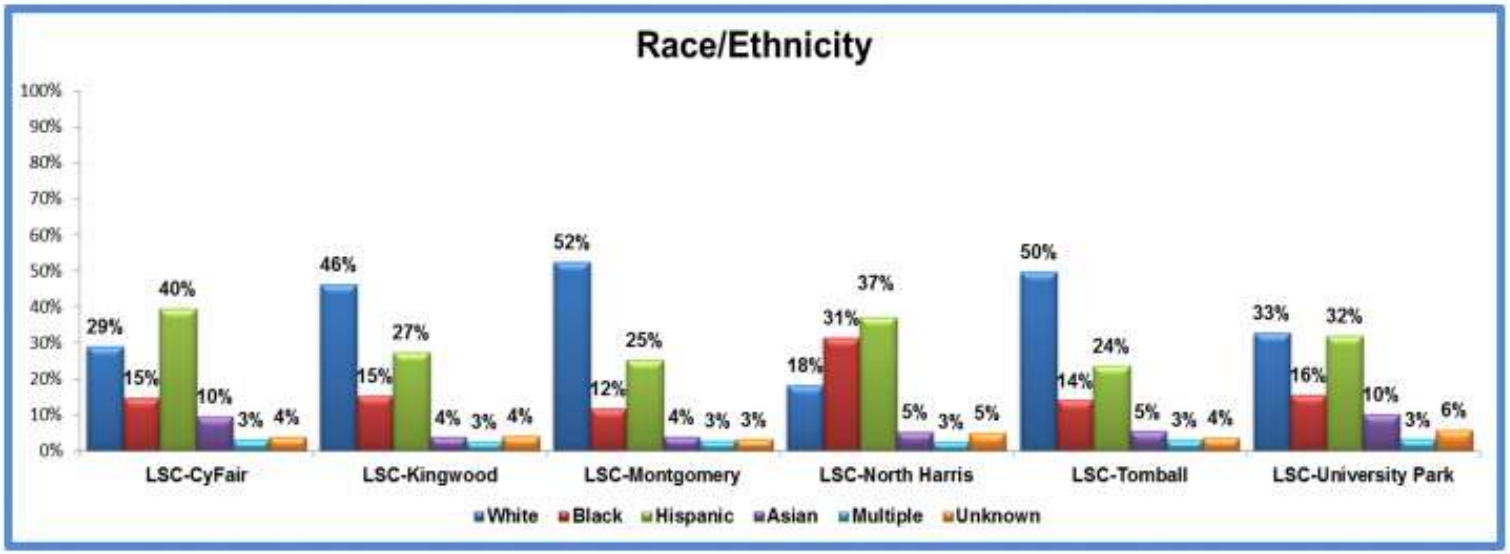
Standard Reporting Calendar

- ***What Was Done in the Past?***
- ***Anticipate Client Needs***
- ***Communicate***
- ***Publish Reports on Website and SharePoint***

Lone Star College System
Research and Institutional Effectiveness

Lone Star College System
Student Demographics
Official Day
Fall 2013

Race-Ethnicity	System-wide		LSC-CyFair		LSC-Kingwood		LSC-Montgomery		LSC-North Harris		LSC-Tomball		LSC-University Park	
	#	%	#	%	#	%	#	%	#	%	#	%	#	%
White	27,819	36%	5,661	29%	5,514	46%	6,691	52%	3,154	18%	4,404	50%	2,395	33%
Black	13,971	18%	2,860	15%	1,836	15%	1,499	12%	5,397	31%	1,244	14%	1,135	16%
Hispanic	25,053	32%	7,739	40%	3,267	27%	3,221	25%	6,395	37%	2,097	24%	2,334	32%
Asian	4,989	6%	1,863	10%	456	4%	511	4%	930	5%	482	5%	747	10%
Amer-Ind	243	0%	51	0%	44	0%	54	0%	39	0%	36	0%	19	0%
Multiple	2,249	3%	608	3%	325	3%	364	3%	442	3%	271	3%	239	3%
Unknown	3,297	4%	762	4%	501	4%	418	3%	860	5%	328	4%	428	6%
Grand Total	**77,621**	**100%**	**19,544**	**100%**	**11,943**	**100%**	**12,758**	**100%**	**17,217**	**100%**	**8,862**	**100%**	**7,297**	**100%**



Source: ORIE Official Day Fall 2013
TKT0017711
cah

ORIE Site for LSCS Operational Reports & Resources

SharePoint Overview

Institutional Effectiveness Summit Presentation

KPI Catalog

Listing of SharePoint Standard Reports

Libraries

System Reports

CyFair Reports

Kingwood Reports

Montgomery Reports

North Harris Reports

Tomball Reports

University Park Reports

LSC-Online Reports

Continuing Ed Reports

Site Pages

IR Team Library

IR Team

Pictures

IE Summit 2013

Halloween 2013

All ORIE August 2013

Kent's Birthday 2013

ORIE Miscellaneous

All ORIE December 2013

SO Christmas Party 2013

Helpful Links

Discussions

Team Discussion

Recycle Bin

All Site Content

ORIE Site for LSCS Operational Reports & Resources

The mission of the Office of Research and Institutional Effectiveness (ORIE) is

to promote a culture of continuous improvement and data-informed decision making.

This site contains Lone Star College System-wide standard reports such as Grade Distribution Report, Completion & Success Report and Faculty Profile. You will also find links to the ORIE Public Web Page, as well as FAQ's, Glossary of Terms, and MUCH more! Each College has its own library of reports that can be accessed by authorized users from the navigation panel to the left.

What's NEW?

Fall 2013 Completion and Success and Grade Distribution Reports have been posted for all Colleges.

File | Open in Excel | Data | Find

Lone Star College System
Research and Institutional Effectiveness

Lone Star College System
Office of Institutional Research
February 2014 Reports Calendar

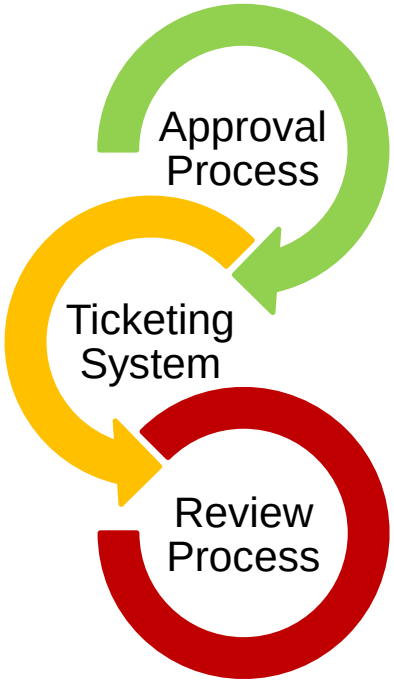
February 2014	Su	M	Tu	W	Th	F	Sa	Su	M	Tu	W	Th	F	Sa	Su	M	Tu	W	Th	F	Sa	Su	M	Tu	W	Th	F	Sa	Su	M	Tu	W	Th	F	Sa	Su	M
							1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28		
INTERNAL STANDARDIZED REPORTING																																				
PTK List												6																								
Dual Credit Reports													7																							
ISD Reports																											21									
Fast Facts																																		28		
EXTERNAL VIP REPORTING																																				
IPEDS –Integrated Postsecondary Education Data System (IPEDS) Student Financial Aid																10																				
Grade Distribution Report for MyEdu (Vance)																							18													
Peterson's Annual Survey of Undergraduate Institutions																											21									
Peterson's Interim Expenses update																											21									
Clearinghouse Enrollment Submission																																26				

Spring 2014

Standard Report Library

Be Consistent

Data Request Workflow Process



SNOW Ticketing System

Ticket | = Required field | Update

Number:	TKT0024267	Contact type:	Email
Requested by:	Kendall Lawrence	Opened by:	Janet Flores
Requested for:	Kendall Lawrence	State:	Open
Best contact number:	(832) 234-5606	Classification:	Institutional Research > Report / Data Reques
Campus/Site:	North Harris	Issue/Close code:	
Building:	Digital Technology Center	Assignment group:	ORIE
Room:	110	Assigned to:	Jose Herrera
Priority:	4 - Normal	Time worked:	00:03:57 / 00 : 00 : 00
Due date:	02-11-2014 4:27 PM		
Short description:	NH-Career and Applied Technology Students SP14		

Notes

Watch list:	James McShan, orie@lonestar.edu	Work notes list:	James McShan, orie@lonestar.edu

Description:

I need all Spring 2014 students in the Career and Applied Technology Division. All students who have designated a certificate or an AAS in any of our programs.

This information will be used to monitor student progress and contact students for career placement.

SNOW Daily Report

Report Title: Analyst Daily Assignments
Run Date & Time: 02-11-2014 4:00 PM CST
Run By: Janet Flores
Table name: ticket
Query Condition: State = Open .or. State = Work In Progress AND Assigned to = Christopher Tkach .or. Assigned to = James McShan .or. Assigned to = Jason Kot .or. Assigned to = Catherine Hooper .or. Assigned to = Deseree Probasco .or. Assigned to = Jose Herrera .or. Assigned to = Trudi White .or. Assigned to = Jacqueline Goffney .or. Assigned to = Anna Garland .or. Assigned to = Latrice Rideout .or. Assigned to = Mei Wang .or. Assigned to = Janet Flores
Group by: Assigned to
Sort Order: Opened in descending order

50 Tickets

Number	Requested for	Due date	Assigned to	Short description	State	▼ Opened
◆ Assigned to: Anna Garland (5)						
TKT0024560	Tracie Ring	02-17-2014 1:48 PM CST	Anna Garland	KW- Current Veteran Students E-Mail Address List	Open	02-07-2014 1:40 PM CST
TKT0024532	John Theis	02-12-2014 10:52 AM CST	Anna Garland	KC-Success Rates of Students Taking GOVT 2305 or 2306 without ENGL 1301	Open	02-07-2014 10:51 AM CST
TKT0024493	Christopher Tkach	03-07-2014 4:33 PM CST	Anna Garland	ER-2014 ACT Institutional Data Questionnaire	Open	02-06-2014 4:31 PM CST
TKT0018959	Donna Spivey	02-14-2014 2:33 PM CST	Anna Garland	KC-Nursing Graduates Survey	Open	10-10-2013 2:32 PM CDT
TKT0016533	Paul Blakelock	02-21-2014 3:08 PM CST	Anna Garland	KC-Regression Analysis of the Predictors of Success	Open	08-21-2013 3:07 PM CDT
◆ Assigned to: Catherine Hooper (10)						
TKT0024478	Kristina Raymond	02-28-2014 2:25 PM CST	Catherine Hooper	NH-List of Students Seen in Transfer Center for 2013 and 4-Year Institution	Open	02-06-2014 2:25 PM CST
TKT0024134	Catherine Hooper	06-12-2014 3:32 PM CDT	Catherine Hooper	ER-NCCBP Annual Survey 2014 (External Survey)	Open	01-31-2014 3:31 PM CST
TKT0024126	Janet Flores	02-21-2014 2:56 PM CST	Catherine Hooper	ER-Peterson's Annual Survey of Undergraduate Institutions	Work In Progress	01-31-2014 2:56 PM CST
TKT0024122	Janet Flores	02-28-2014 2:33 PM CST	Catherine Hooper	ISR-Fast Facts for all Campuses SP14	Open	01-31-2014 2:32 PM CST

Lone Star College System
Research and Institutional Effectiveness

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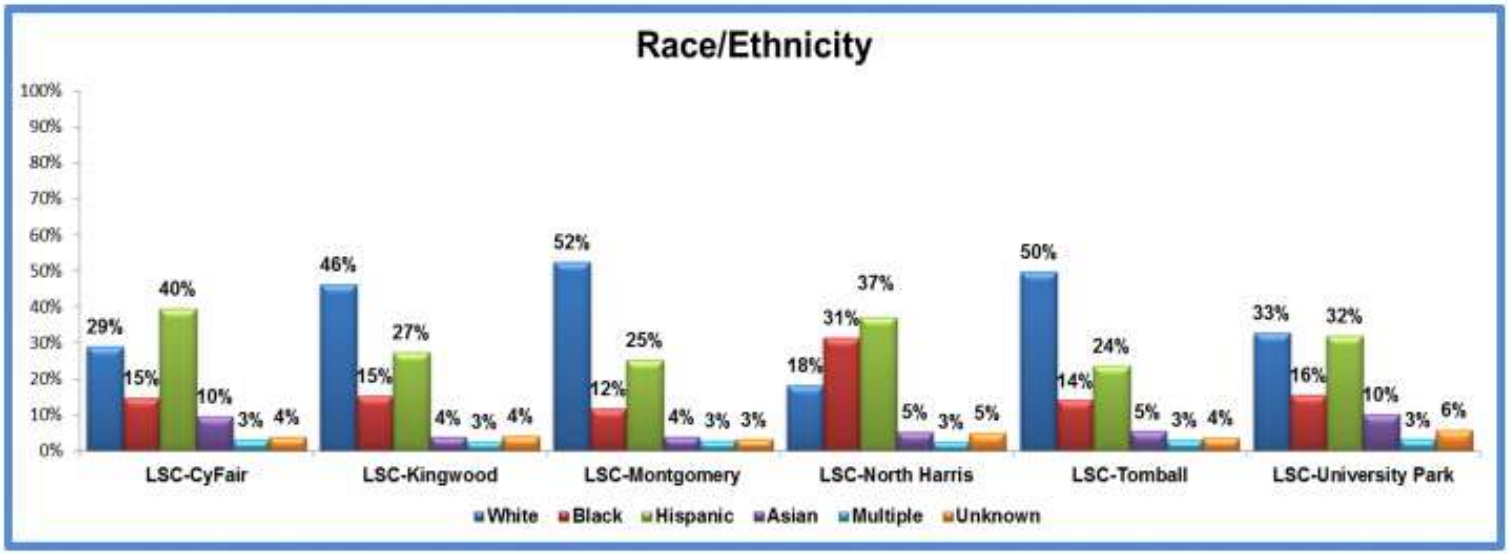

Source: ORIE Official Day Fall 2013
TKT0017711
cah

Electronic Filing System

- *Standard Naming Convention*
- *Protocol Documents*
- *Search Capabilities*

Filing System

Name	Date modified	Type
00 Chancellor-SVC 2014	1/23/2014 10:49 AM	File folder
01 Student Success 2014	1/30/2014 4:03 PM	File folder
02 External Affairs 2014	2/3/2014 4:23 PM	File folder
03 Administration & Finance 2014	1/17/2014 10:17 AM	File folder
04 Academic Affairs 2014	1/29/2014 1:07 PM	File folder
05 Technology Services 2014	1/6/2014 11:00 AM	File folder
06 Workforce Education 2014	1/31/2014 1:19 PM	File folder
07 General Counsel 2014	1/6/2014 11:00 AM	File folder
08 Office Emergency Management 2014	1/6/2014 11:00 AM	File folder
09 Human Resources	1/22/2014 12:16 PM	File folder
10 Exec. Director ORIE 2014	1/31/2014 9:22 AM	File folder
11 Director IR 2014	1/6/2014 11:01 AM	File folder
12 Director IE 2014	1/6/2014 11:01 AM	File folder
13 ORIE Training 2014	1/6/2014 11:01 AM	File folder
14 Director OERS 2014	1/6/2014 11:01 AM	File folder
20 Major Initiatives 2014	1/6/2014 11:01 AM	File folder
21 External VIP Reporting 2014	1/31/2014 2:57 PM	File folder
22 Internal Standardized Reporting 2014	1/31/2014 11:16 AM	File folder
Campus 2014	1/27/2014 1:08 PM	File folder

Filing System

Work Orders ▸ 00 WO 2014 ▸ Campus 2014 ▸

Name	Date modified	Type
CyFair	2/3/2014 1:37 PM	File folder
Kingwood	1/28/2014 9:42 PM	File folder
Montgomery	1/28/2014 9:49 PM	File folder
North Harris	2/3/2014 4:28 PM	File folder
Tomball	1/30/2014 10:42 AM	File folder
University Park	1/22/2014 2:18 PM	File folder

Evaluate and Improve

Promoting Efficiency and Quality

- ***Be One Step Ahead***
- ***Be Consistent in Your Reporting***
- ***Be Organized***

8) Relationships
9) Stress

Questions?

Janet Flores, Program Manager

Kent McShan, Director of IR

Deseree Probasco, Sr. Lead Analyst