Onboarding new data professionals

March 27, 2023

Presented by:
Christopher Reid

Panel:
Dr. Jae Hak Jung
Kawandanell Jaramillo
Marissa Perez
Christopher Reid

One LSC | Student Focused | Own It | Advance Equity | Cultivate Community | Choose Learning – LSC Cultural Beliefs

About Lone Star College

- Over 80,000 students enrolled each semester
- One of the top 3 largest colleges in the nation
- One of the fastest-growing college systems in U.S.
- Added 11,188 students fall 2013 to fall 2023, a 14.4% increase
- 11 school districts, 2,700 square miles, population of 2.4 million
- Recognized as a Top 10 Degree Producer for minorities
- 6,900+ employees (part-time and full-time)

Analytics and Institutional Research

https://www.lonestar.edu/about-us-institutional-research.htm

Presenting: Onboarding new data professionals

Lone Star College Analytics & Institutional Research has developed a comprehensive and successful onboarding process that engages new analysts and puts them on the path to success.
Presented by:
Chris Reid

The panel discussion will include an IR Director, a Senior Manager, and two Data Analysts who will discuss their experiences both providing and receiving the onboarding process.
Panelists:
Dr. Jae Jung
Kawan Jaramillo
Marissa Perez
Chris Reid

Analytics and Institutional Research

So…why are we here….

We have developed an onboarding process and documentation….

Our panel will discuss their experiences with the LSC-AIR onboarding….

Onboarding

Our approach includes an extended introduction that encapsulates institutional knowledge, reporting practices, proven data methodologies, and hands-on introductions to data ETL.

Panel Discussion

The audience is invited to ask questions at any time and engage with the panel.

"This is one of my favorite topics. [Lone Star College] IR is successful for a number of reasons including selecting the right applicant for the position, **providing comprehensive but flexible training**, ensuring a support structure after training, providing grace to learn/question/make mistakes, and re-training if needed."

Jacqueline Goffney, M.B.A., M.Ed., ITIL
Associate Vice Chancellor
Lone Star College Analytics & Institutional Research

Our approach to onboarding is to spend a lot of time with the analyst and expose them to….

When we start the panel discussion, please feel free to….

Interesting fact….

…of those that have been onboarded in LSC-AIR-IR since 2015*, only one person has left Lone Star for another position (and that person has expressed interest in rejoining the team). Before that, we had too much turnover and insufficient onboarding was one of the reasons for it.

*Credit where credit is due:
Jacqueline Goffney, now Associate Vice Chancellor of LSC-Analytics and Institutional Research, revamped the program in 2015 and managed it personally until 2023 when it was taken over by current IR management staff.
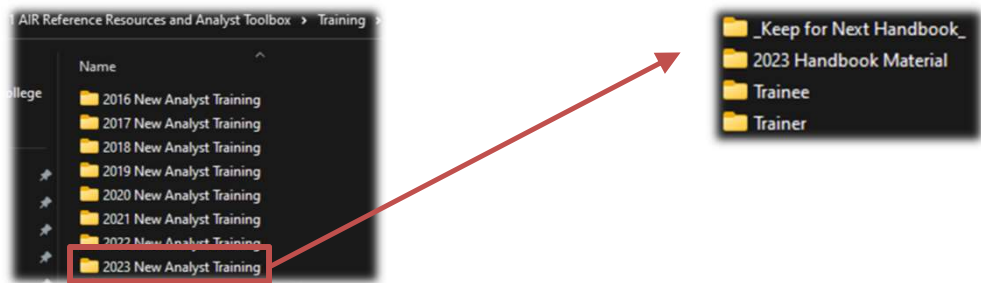
(Institutional Research is a part of Analytics and Institutional Research at Lone Star College.)
To put that in perspective: there are 11 people in IR at LSC.

Onboarding

Preparation—
- **Onboarding documentation updated and revised as needed per onboarding**
- **Provide new employee a printed handbook in 3" ring binder**
- **Also, everything is saved for later reference**

We review and update the onboarding before, after, and during….

Note the "Keep for next handbook"…these are things that come up during the onboarding process that we want to include in the next version.

Onboarding

Onboarding Tabs
1. **Overview topics**
2. **Analyst basics**
3. **Data request lifecycle**
4. **Analyst tools/software**
5. **Training Modules**
6. **Resources/references**
7. **Calendar**
8. **Everything else**

Training Modules
1. **Intro: Excel/Filemaker**
2. **Intro: SQL**
3. **Headcount/Enrollments**
4. **Enrollments by Delivery Method**
5. **Completion and Success**
6. **Contact Lists**

Homework
Per Tab, related to topics discussed.
Exercises
After sessions with supervisor, create reports per instructions.

Tabs are the supervisor presented collection of training material (in the binder and presented to the analyst and discussed)

Modules are "training sessions" using real-world data with the supervisor

Homework is for the analyst to complete during "free time"

Exercises are real-world data reporting after the supervisor training sessions.

Onboarding

Schedule—
- **Up to 5 days of one-on-one training with supervisor**
- **One day of one-on-one with each analyst across system**
- **Existing analysts are given major topics to cover**

Position	LSC Knowledge Area	AIR Knowledge Area	Tools Knowledge Area
Analyst II CyFair	• Dual Credit	• Databases	• SQL • SAS
Analyst II SO-TW	• Workforce • Continuing Ed	• Course Data	• Power BI • ArcGIS
Analyst II North Harris	• Special Populations • iStar Nav • Data Validation	• Formatting (Excel)	• Filemaker
Analyst II Tomball	• Campus Culture • Data Validation	• Communication • Processes	• Excel • DAX / Power Query
Director SO-TW	• Dev Ed/Co-Req	• Power BI Reports	• Research and Statistical Methods
Analyst I SO-TW	• Business Processes • CE/Non-Credit	• What a new analyst needs to know.	• Excel formatting functions
Analyst II Kingwood	• Dual Credit	• Joining data	• Excel
Sr. Manager SO-TW	• Transfers • Corequisite • Org Dev	• Ticket/Project Management • Data Modeling	• Power BI Desktop • DAX
Sr. Analyst Montgomery	• Data Analysis • Research methods • Demography	• Data Modeling • Documentation and Formatting	• SQL • STATA • SPSS
Sr. Analyst Univ. Park	• Student Data	• Special Requests	• Review Process • Data Resources
Analyst II Houston N.	• Student profiles	• Connecting data	• Learning SQL

One the more unique things that's a part of our onboarding process….

LSC Knowledge
AIR Knowledge
Tools Knowledge

Questions?

Next….

Panel Discussion

We'll start with panelist
1. Introducing themselves
2. How long they've been with LSC-AIR
3. Any prior experience with data analysis/reporting
4. Briefly what the onboarding was like for them

Panelists—
- Dr. Jae Hak Jung – Director Institutional Research (2014)
- Kawandanell Jaramillo – Data Analyst, Tomball Campus (2019)
- Marissa Perez – Data Analyst, Kingwood Campus (2022)
- Christopher Reid – Manager Institutional Research (2018)

Panel Discussion

Did the onboarding process meet your expectations?

Panelists—
- **Dr. Jae Hak Jung – Director Institutional Research (2014)**
- **Kawandanell Jaramillo – Data Analyst, Tomball Campus (2019)**
- **Marissa Perez – Data Analyst, Kingwood Campus (2022)**
- **Christopher Reid – Manager Institutional Research (2018)**

Audience Questions?

Did the onboarding process meet your expectations?

What aspects of the orientation program did you find interesting or interactive?

Panel Discussion

When preparing or providing the onboarding training, what do you believe is most important to impart to new analysts?

Panelists—
- **Dr. Jae Hak Jung – Director Institutional Research (2014)**
- **Kawandanell Jaramillo – Data Analyst, Tomball Campus (2019)**
- **Marissa Perez – Data Analyst, Kingwood Campus (2022)**
- **Christopher Reid – Manager Institutional Research (2018)**

Audience Questions?

Panel Discussion

How did the onboarding help prepare you for your job responsibilities?

Panelists—
- **Dr. Jae Hak Jung – Director Institutional Research (2014)**
- **Kawandanell Jaramillo – Data Analyst, Tomball Campus (2019)**
- **Marissa Perez – Data Analyst, Kingwood Campus (2022)**
- **Christopher Reid – Manager Institutional Research (2018)**

Audience Questions?

How did the training help prepare you for your job responsibilities?

Which training materials and resources were most helpful?

What help and support did you appreciate most?

Panel Discussion

Did you feel welcomed and included during your first weeks and months?

Panelists—
- **Dr. Jae Hak Jung – Director Institutional Research (2014)**
- **Kawandanell Jaramillo – Data Analyst, Tomball Campus (2019)**
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Audience Questions?

(Engagement) Did you feel welcomed and included during your first weeks and months?

Did you find it helpful to connect with your colleagues and team members one-on-one?

Were there any challenges in understanding complex concepts related to data analysis or technology?

Panel Discussion

Most challenging topic?
Most enjoyable topic?

Panelists—
- **Dr. Jae Hak Jung – Director Institutional Research (2014)**
- **Kawandanell Jaramillo – Data Analyst, Tomball Campus (2019)**
- **Marissa Perez – Data Analyst, Kingwood Campus (2022)**
- **Christopher Reid – Manager Institutional Research (2018)**

Audience Questions?

What was your most challenging training topic, and how did the onboarding process help (or not help) you understand your most challenge training topic?

What was the training topic you enjoyed most, and how did the onboarding process help (or not help) you understand your most enjoyed training topic?

Audience Questions?

VISION

TO BE AN INDUSTRY LEADER IN THE USE OF DATA AND ANALYTICS
TO DRIVE INSTITUTIONAL AND STUDENT SUCCESS.

MISSION

Serve as a trusted partner
providing data and analytical
expertise to support planning
and decision-making.

VALUES

These beliefs are at the core of
everything we do:

ACCURACY
Deliver correct & precise information

COMMUNICATION
Connect through dialogue

CUSTOMER FOCUS
Delight our customers

INNOVATION
Introduce new approaches

INSIGHT
Contribute to deeper understanding

RESPECT
Treat others well

Analytics and Institutional Research

LONE STAR COLLEGE