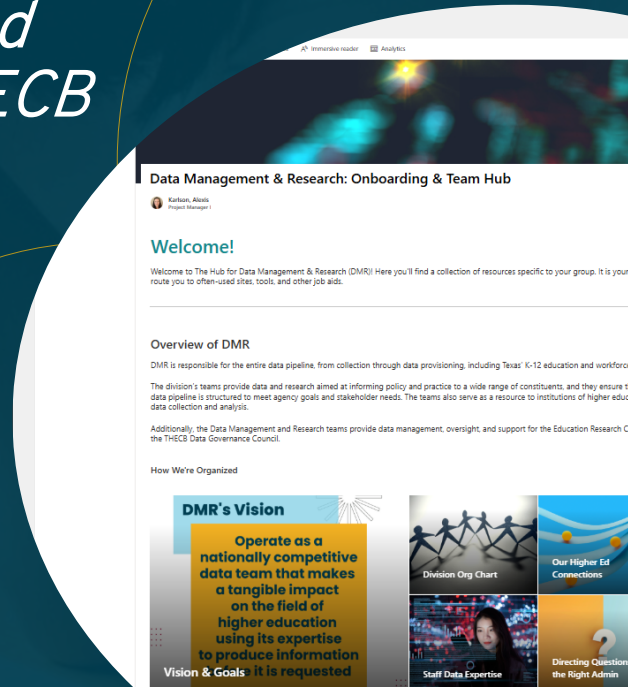
Texas Higher Education
COORDINATING BOARD

# The HUB!

*Sharing features and templates from the internal centralized resource for the Data Management & Research team at THECB*

Texas Association of Institutional Research
2025 Annual Conference – Corpus Christi, TX

Alexis Karlson, Project Manager
Brian Cordeau, Deputy Assistant Commissioner, DMR
Kim De La Cruz, Data Experience Strategist



# THECB Roles: Raising the Bar for Higher Ed

THECB plays a unique role as a partner, advocate, and resource to higher education institutions, students, policymakers, and other stakeholders across the state

## RESOURCE

Inform decisions through actionable data, tools, and support, especially in areas with the highest needs

## ADVOCATE

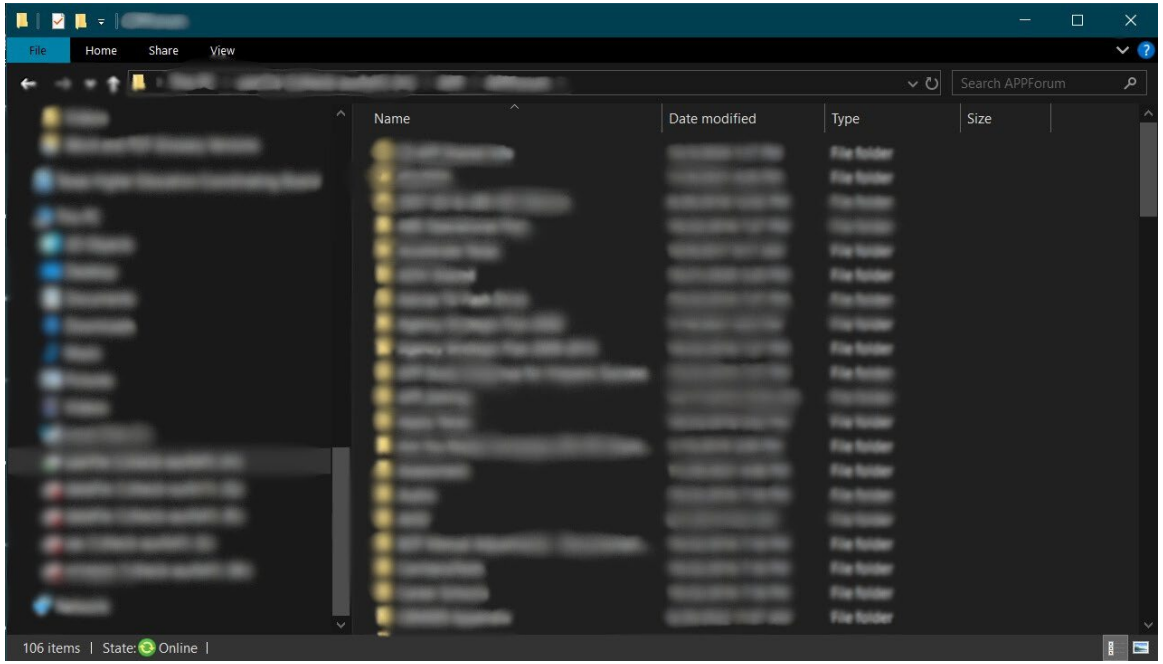
Shape the narrative around higher education for Texas policymakers, businesses, and the public

## PARTNER

Collaborate with institutions to build a Talent Strong Texas and create economic opportunities for all

Data Management & Research (DMR) is responsible for THECB's **entire data pipeline** from collection through data provisioning and facilitating **data sharing agreements** with other entities such as TEA and TWC.

The division's teams provide **data and research** aimed at informing **policy and practice** to a wide range of constituents, and they ensure that the data pipeline is structured to **meet agency goals and stakeholder needs**.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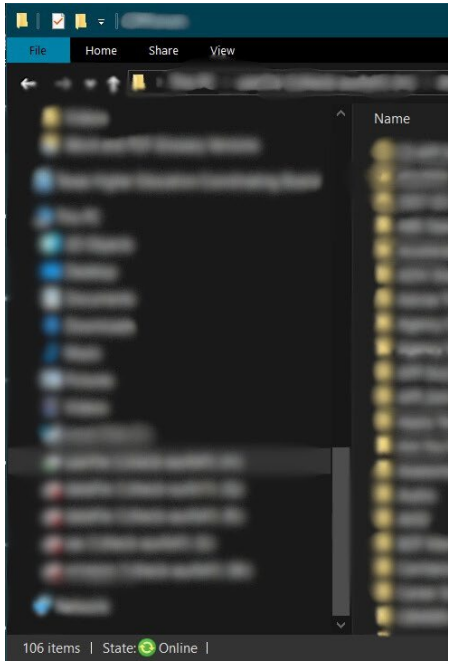



Data Management and Research Division

Home
Conversations
Documents
Notebook
Pages
Site contents
Recycle bin
Edit

New | Promote | Page details | Immersive reader | Analytics

# Data Management & Research: Onboarding & Team Hub

Karlson, Alexis
Project Manager I

## Welcome!

Welcome to The Hub for Data Management & Research (DMR)! Here you'll find a collection of resources specific to your group. It is your portal to route you to often-used sites, tools, and other job aids.

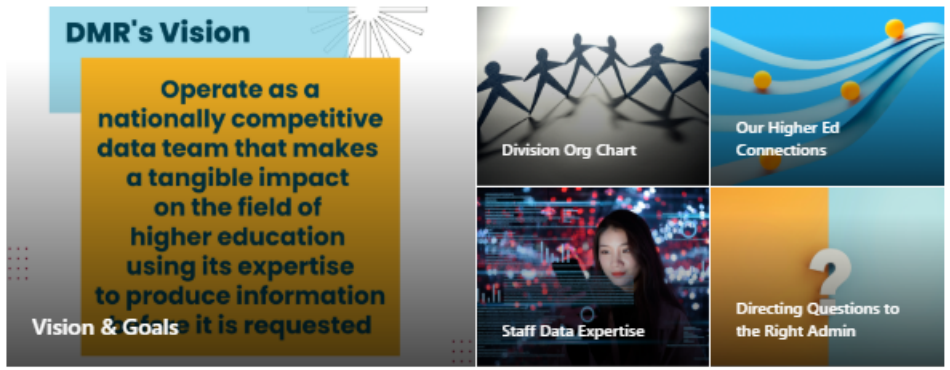
### Overview of DMR

DMR is responsible for the entire data pipeline, from collection through data provisioning, including Texas' K-12 education and workforce data.

The division's teams provide data and research aimed at informing policy and practice to a wide range of constituents, and they ensure that the data pipeline is structured to meet agency goals and stakeholder needs. The teams also serve as a resource to institutions of higher education for data collection and analysis.

Additionally, the Data Management and Research teams provide data management, oversight, and support for the Education Research Centers and the THECB Data Governance Council.

### How We're Organized



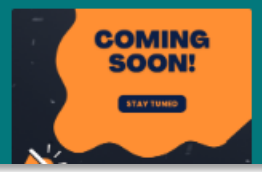

### Centralized Tracking System

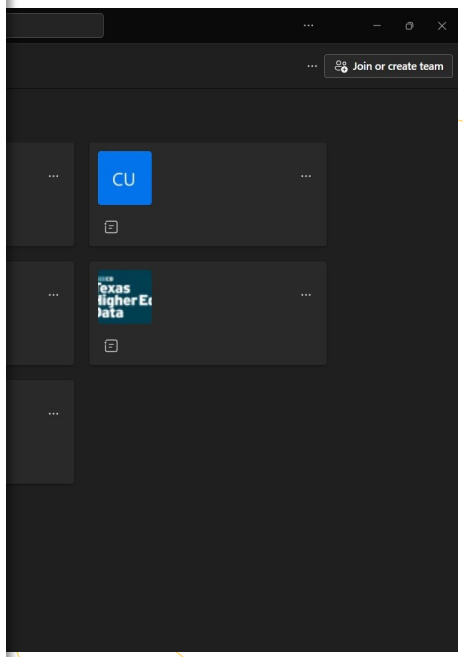
The CTS is the system DMR uses to manage tracking tickets for data requests and project work. All DMR staff can log their work and coach people outside the division on how to submit a data request form.

NOTE: If you have issues accessing the CTS Dashboard, open the Hub in a web browser instead of through MS Teams and try again.

- CTS Dashboard
- Submit a New Data Request
- View Open Requests
- View Archived Requests
- CTS Update: Weekly Update Request Feature
- Video Tutorial

### DMR Learning Cafes



# What we will cover

- Background
- Key elements and demo
- Iterative, sustainable maintenance & development
- Hub starter pack

# What is it for?

- Initially started as an onboarding tool
  - Onboarding is labor intensive
- Expanded to cover ongoing resources
  - One stop shop for key things analysts need to know
- Tracking the work
  - Dashboard on Dashboards (and everything else we work on)
- Ongoing Development of Analysts
  - Professional Development Library (Learning Café)
  - Other PD resources

# Key Elements

- Vision and Mission
- Staff Data Expertise
- DMR Forecast
- CTS Tracking Log + Dashboard
- Professional Development Activities
- Procedures and Guides
- Templates
- Standard Software

# Staff Data Expertise

- Who Specializes in What?
- Helps with assigning new requests

| Expertise by Measure/Data for Ad Hoc Reporting | Current Staff - Primary | Current Staff - Secondary | Consult for Assignment |
|---|---|---|---|
| 8th Grade Cohorts (T3) | SW Sharon Wong | AI Alyssa Ibarra<br>Amy McCurdy | CZ Christina Zavala |
| Accountability System -Running data | SW Sharon Wong | CZ Christina Zavala<br>CD Chrys Dougherty<br>KP Ken Pon<br>RG Randy Gesn<br>SW Sharon Wong | BC Brian Cordeau<br>CZ Christina Zavala |

# DMR Forecast

- Annual project planning and accountability tool
- Status Indicator

| Subject | Stop Notifica... | Staff Assigned | Secondary Staff | Assigned in CTS? | Start Month | End Month |
|---|---|---|---|---|---|---|
| **Category 1: Recurring/Annual Analysis: Reports, Memos, Forecasts** | ☐ | | | | | |
| Accountability System Data Runs | ☐ | SW Sharon Wong | CZ Christina Zavala<br>CK Clifford King | 🟡 | 01 January | 07 July |
| High School Graduates' GPA in Higher Ed report | ☐ | FC Franc Castro | CZ Christina Zavala<br>SW Sharon Wong | 🟢 | 01 January | 02 February |

# Centralized Tracking System (CTS)

- Project tracking system and workload management

| Unique ID | Received Date* | Preferred Response Date | Intended Response Date (Internal) | Priority | Current Status | APPROVAL STATUS | Status Date | Staff Assigned |
|---|---|---|---|---|---|---|---|---|
| [redacted] | 02/11/25 | 02/14/25 | 02/14/25 | Normal | Assigned | | 02/11/25 | AN Alina Nepal |

# CTS Dashboard

**Data Management & Research**
**Centralized Tracking System**

Last Update:
2/21/2025 4:01:33 AM

Overview | Request Detail | Archive | Feedback

| Team | Analyst | Priority | Source of Request | Due Date |
|---|---|---|---|---|
| All | All | All | All | All |

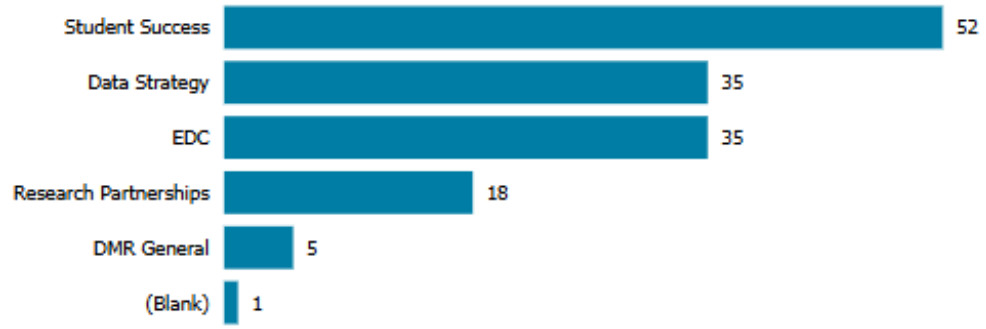
**146**
**Open Projects**

**24**
**Projects > 2 Weeks Overdue**

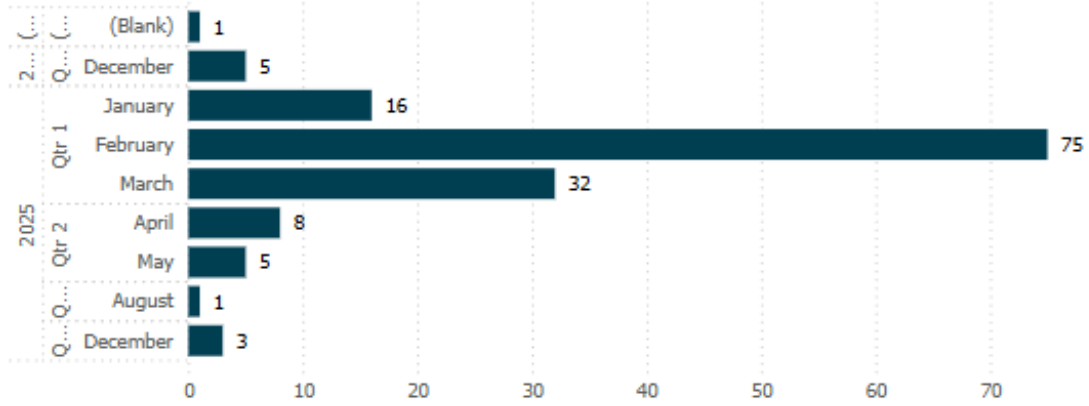
## # Requests by Source

| | |
|---|---|
| Data Management and Research | 77 |
| Funding and Resource Planning | 21 |
| SFAP/DMA | 13 |
| I am a representative of a Texas institution of higher education or system and requesting data on behalf of my institution. | 12 |
| SFAP - DMA | 5 |
| Academic Health Affairs | 2 |
| College and Career Advising | 2 |
| I am a representative of a Texas institution of higher education or system. | 2 |

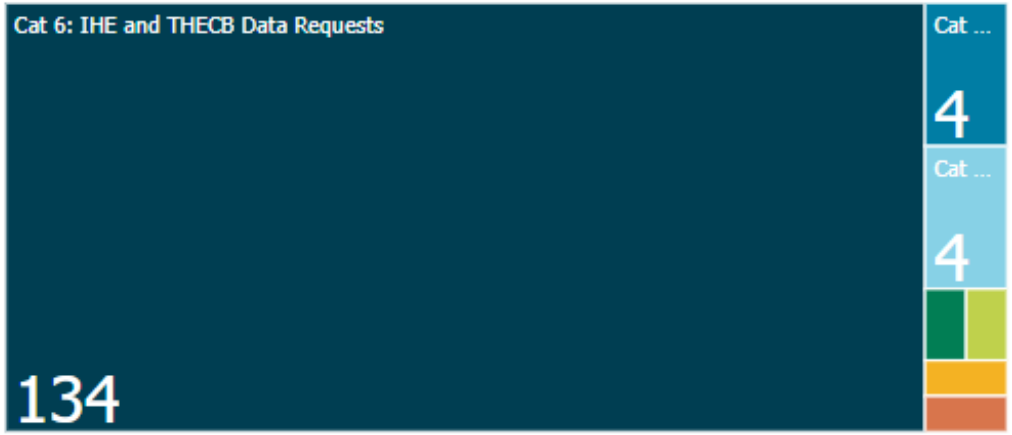
## # Current Projects by Team (Drill through for Analyst Detail)




## # Projects by Intended Due Date



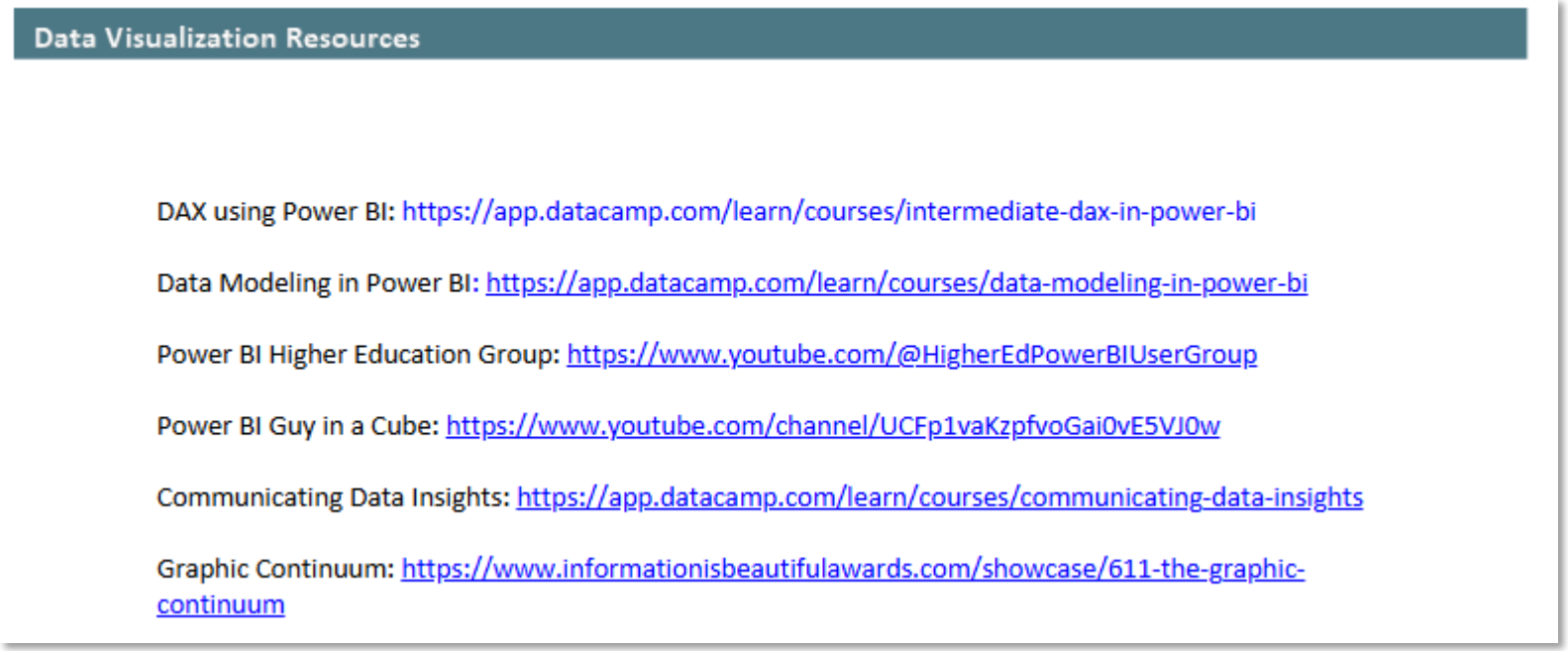

## # Projects by Request Category




Make a new data request.

# Professional Development Resources

- Recorded Learning Cafes
- Organized links to resources



**Data Visualization Resources**

DAX using Power BI: https://app.datacamp.com/learn/courses/intermediate-dax-in-power-bi

Data Modeling in Power BI: https://app.datacamp.com/learn/courses/data-modeling-in-power-bi

Power BI Higher Education Group: https://www.youtube.com/@HigherEdPowerBIUserGroup

Power BI Guy in a Cube: https://www.youtube.com/channel/UCFp1vaKzpfvoGai0vE5VJ0w

Communicating Data Insights: https://app.datacamp.com/learn/courses/communicating-data-insights

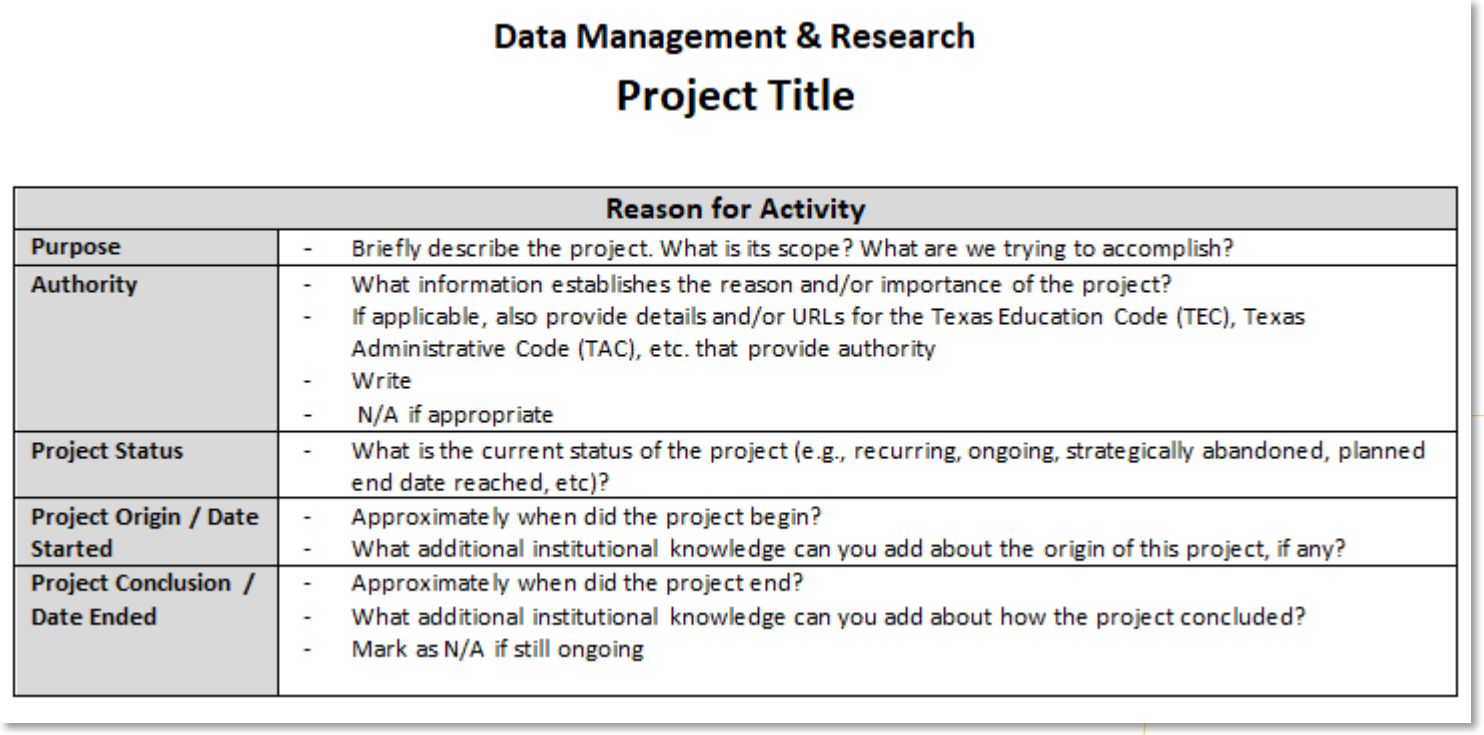
Graphic Continuum: https://www.informationisbeautifulawards.com/showcase/611-the-graphic-continuum

**Learning Cafe Archive**

- 1/10/25: Complementary Masking Policy (link) (PowerPoint)
- 12/6/24: Texas Legislative Online (TLO) (link)
- 11/19/24: Intro to Legislative Session; 89th Session (link)
- 11/15/24: SAS for Formatting Files (link)
- 10/18/24: CTS Methodology Template (link)
- 9/13/24: CBM Documentation (link)
- 8/16/24: IPEDS (link)

# Procedures and Guides

- Step-by-step guides to major projects
- Updated annually alongside project work by staff



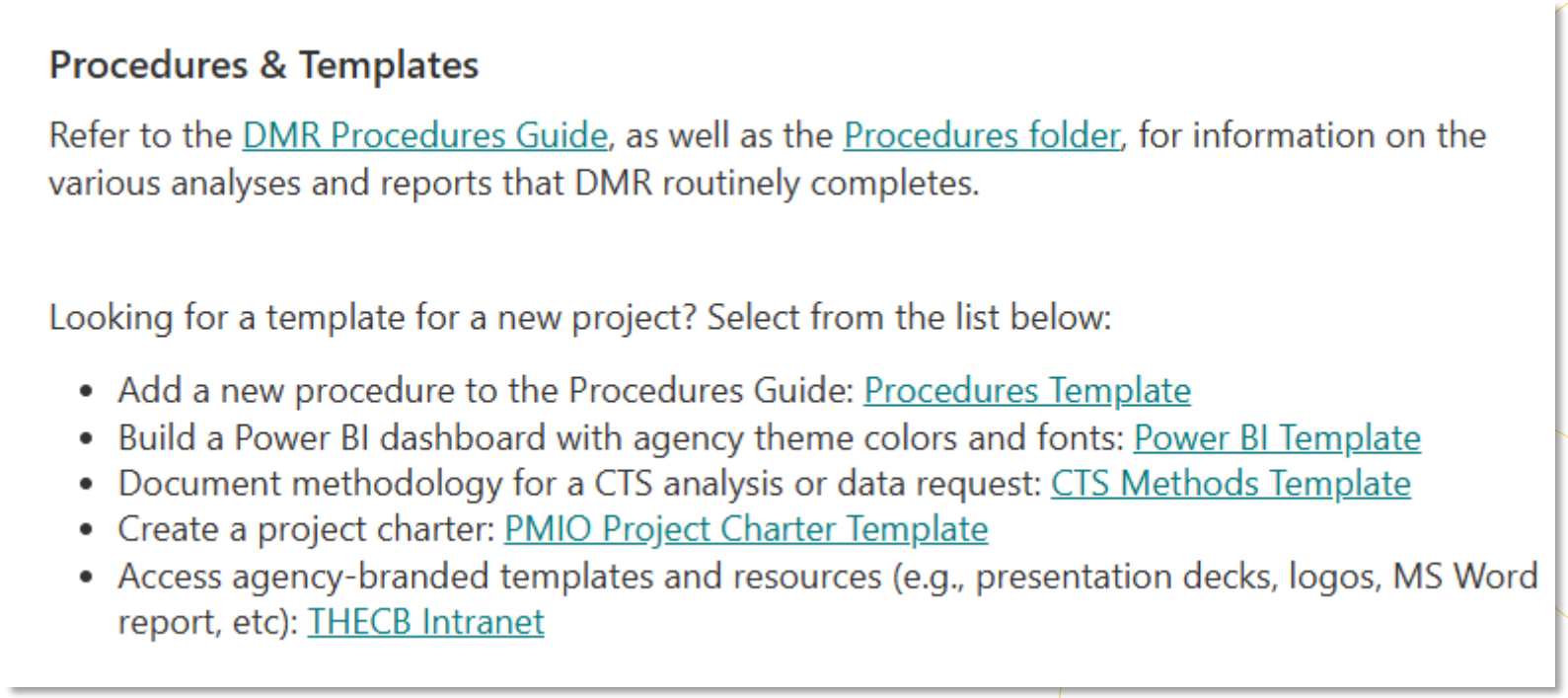
**Data Management & Research**

**Project Title**

| Reason for Activity | |
|---|---|
| **Purpose** | - Briefly describe the project. What is its scope? What are we trying to accomplish? |
| **Authority** | - What information establishes the reason and/or importance of the project?<br>- If applicable, also provide details and/or URLs for the Texas Education Code (TEC), Texas Administrative Code (TAC), etc. that provide authority<br>- Write<br>- N/A if appropriate |
| **Project Status** | - What is the current status of the project (e.g., recurring, ongoing, strategically abandoned, planned end date reached, etc)? |
| **Project Origin / Date Started** | - Approximately when did the project begin?<br>- What additional institutional knowledge can you add about the origin of this project, if any? |
| **Project Conclusion / Date Ended** | - Approximately when did the project end?<br>- What additional institutional knowledge can you add about how the project concluded?<br>- Mark as N/A if still ongoing |

# Templates

- Templates for common documents
- Maintain consistency across the division



**Procedures & Templates**

Refer to the DMR Procedures Guide, as well as the Procedures folder, for information on the various analyses and reports that DMR routinely completes.

Looking for a template for a new project? Select from the list below:

- Add a new procedure to the Procedures Guide: Procedures Template
- Build a Power BI dashboard with agency theme colors and fonts: Power BI Template
- Document methodology for a CTS analysis or data request: CTS Methods Template
- Create a project charter: PMIO Project Charter Template
- Access agency-branded templates and resources (e.g., presentation decks, logos, MS Word report, etc): THECB Intranet

# Software + Connections

- What software is needed to get job done
- Makes it easier to get this to ITS to get computer set up

| Software | All |
|---|---|
| SAS | x |
| SQL Server Management Studio (SSMS) | x |
| Power BI Desktop | x |
| R | x |
| Anaconda | x |
| Standard MS Office Suite (Teams, Outlook, | x |
| Adobe | x |
| VS Code | x |
| Google Chrome | x |
| Azure Data Studio | x |
| Ultra Edit | |
| Visio | |
| Azure DevOps | |
| Git | |
| SnowSQL | |
| Snowflake ODBC driver for SAS | |
| Notepad ++ | |
| Erwin | |

# And So Much More....

- Data Suppression Policy
- Flowcharts on
  - How to route PIRs
  - How to route data requests
- Links and background on major projects and tools
- New employee resources
  - Supervisor checklist (pre and post first day)
  - First four weeks onboarding plan

# How it was built

- Identified what employees needed at different stages
- Prioritized and organized planned content to develop draft layout
- Gathered and developed core content
- IT created the SharePoint site; DMR built out the content
- Developed sustainability plan

# Live Demo

- Workflow
- CTS Dashboard
- Templates Review
- Learning Café Review
- Procedures Guide

# Leaving Space for Evolution

- Now that we have the HUB
  - New documents and dashboards added
  - Slide deck links
  - …etc

# Sign up for the Hub Starter Pack

Packet

- Data Request Format
- Project Plan
- Procedures Guide
- Learning Café topics
- And More!

# Contact Us!

Brian.Cordeau@highered.texas.gov
Kim.DeLaCruz@highered.texas.gov

DataSupport@highered.texas.gov

Scan the QR code to complete the session survey.

Texas Association for Institutional Research

Annual Conference: February 25-28, 2025
Omni Hotel in Corpus Christi, TX