CONNECTED**24**

Transforming the Campus Data Landscape with Edify

Moving from Silos and Confusion to Effective Collaboration

Partner Profile | John Carroll University

EAB

John Sully

Associate Chief Information Officer

John Carroll University

Todd Bruce, PhD

Assistant Provost for Institutional Effectiveness and Assessment

John Carroll University

Katerina Chan

Associate Director, Technology Partner Experience

EAB

John Carroll University (JCU)

Background

Private Jesuit 4-year in Cleveland, Ohio

2,300 undergraduates and 450 graduate students

86% retention rate and 78% graduation rate

EAB Data and Analytics

▶ Edify partner since June 2019

▶ APS partner since January 2017

Obstacles to Effectiveness	Glimmers of Light

Inadequate Architecture

Lack of Governance

Poor Communication

Academic Performance Solutions (APS)

Analytic Dashboards

Ad Hoc Solutions

Purpose Drift

Data Governance Task Force

Edify

Source: John Carroll University; EAB interviews and analysis.
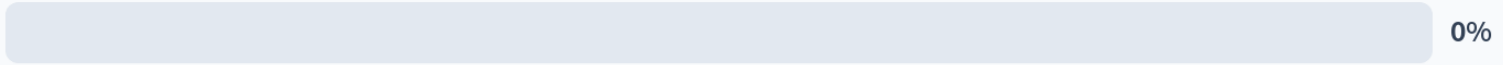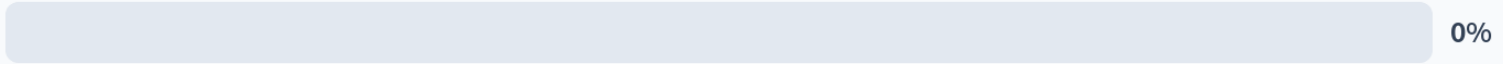
Do you these obstacles resonate with you?

Yes

0%

No

0%

What is your biggest challenge?

Nobody has responded yet.

Hang tight! Responses are coming in.

Data-Informed Program Review and Course Planning

PREVIOUS PROCESSES ▶ IMPROVEMENTS WITH APS ▶ IMPACT ▶

Program Review

Each program required time to identify key points, find them, and interpret them.

✖ No standardized data requirements

✖ Heavy reliance on IR to provide the data

✖ Time-consuming manual data analysis

Course Planning

Keeping an eye on over- or under-filled courses

✖ The only report was poorly designed and difficult to use.

APS Data Requirements

Program Self-Study Reports

- Metrics that aligned with JCU's priorities, such as Intercurricular Dependencies, were selected.
- Faculty members were required to use APS data to help complete their reports.
- Trainings, an APS how-to guide, and more were provided.

Course Planning Optimization Dashboard

- Over- and under-filled courses were easily identified.
- Filters made it easy to see areas of interest.
- Additional data was only a click away.

Improvement Opportunities

180 Hours

Saved in manual data collection and analysis

- APS data surfaced areas of excellence.
- Faculty identified areas below department standards, added commentary for additional context, and proposed next steps for improvements.

Allows JCU to keep an eye on students' ability to graduate on time while also boosting productivity (teaching loads).

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Data Governance

Data Governance Initiatives

Empowering Individuals Across Campus to Strengthen and Standardize Data

Data Governance Task Force

Leadership support and the correct people are key!

Survey of the Data Landscape:
- Identified all data being used across the university
- An 18- to 24-month process

Processes to Understand:
- Student Lifecycle
- Employee Lifecycle
- Faculty as a Special Case
- Everything Else (e.g., Facilities, ITS, Legal, Risk Management)

Guidelines for Governance Work

What We Learned

Data Is Connected

Active Data Stewards

Shared Definitions

Acceptance of Difference

Data Request Process

Data Steward Role and Responsibilities

Data Governance Task Force
Data Steward

John Carroll UNIVERSITY

ROLES & RESPONSIBILITIES:
A staff member with delegated oversight and decision-making responsibility for a subset of the University's data. They have significant technical expertise in data under their purview and deep knowledge of related business processes. They may supervise or also serve as functional data technicians in the day-to-day capture and maintenance of specific subsets of data in related transactional databases.

- **Promote appropriate data use** through planning, policy, and protocols at the University.
- **Implement data standards.** Ensure that data are created and maintained according to University standards. It is the Data Stewards' responsibility to ensure that functional data technicians in their functional area are trained and follow the standards developed by the Data Governance Committee as they relate to all forms of data entry in accordance with University policy.
- **Monitor data quality.** Work with Data Custodians and Functional Data Technicians to create a process for identifying data entry errors and correcting the data to match University standards. They report to the Data Governance Committee any issues that may require larger action.
- **Handle inquiries about data.** Receive and respond to any inquiries related to data that originates from the functional area they oversee, including access requests, metadata requests, standardization, organization, definition, and usage, etc.
- **Facilitate and resolve shared data management issues,** including communicating changes to data capture or reporting needs.
- Serve as a member of the Data Governance Committee

Data Definitions

Undergraduate Admission
Slate is the authoritative data source.

- **Prospects**: Potential stud... vendors. Not all Prospect...
- **Inquiries**: Potential stude... Not all Inquiries were Pro...
- **Applicants**: Potential stud... all Applicants were Prosp... Applicants. This is the nu...
- **Completed Applicants**: A... (e.g., transcripts, test sco...
- **Decisions**:
  - **Institution Decisio...**
    - **Admitted**: ... a postseco...
    - **Denied** ...
  - **Student Decisio...**
    - **Withdraw...** notificatio...
    - **Deposit**: A... intent to a...
    - **Cancelled**: ...

cooperative agreement with some other U.S. college or an institution of another country. *Source: IPEDS Glossary*
  - **Incoming**: students enrolled elsewhere but studying at our institution temporarily
  - **Outgoing**: our students studying temporarily at another institution
- **Readmit**: A previously enrolled student who has applied for reentry to the institution. (i.e., not a new, first-time or transfer student).
- **Non-Degree Seeking**: A student enrolled in courses for credit who is not recognized by the institution as seeking a degree or formal award. Source IPEDS Glossary.
- **Transient (Visiting)**: The student's home institution is elsewhere, where they are seeking a degree. JCU does not monitor their progress in any way, and there's no guarantee the course will transfer to their home institution.
  Categories of visiting students include but are not limited to:
  - **Dual Enrollment (CCP)**: High school students taking college-level classes that meet their high school graduation requirements and will appear on their college transcript.
  - **Cross-Registration**: These students are active at their home institution but take a course at JCU. The home institution verifies them, there are approved courses students can take that will transfer, and they must be enrolled full-time at their home institution. (e.g., ROTC)

Student Population...

- **First-time, first-year**: A st... noted below) attending a... includes students enrolle... students enrolled in the f... summer term, and studen... postsecondary formal aw... *Glossary*
- **Transfer**: A student enter... previously attended a po... graduate). This includes r... institution the prior sum... *Source: IPEDS Glossary*
- **International Student**: A... who is in this country on... indefinitely. *Source: IPED...*
- **Exchange Student (relate...** college program studying...

Financial Services
Banner is the authoritative data source for financial aid information. FAFSA is the authority source for students' social security number.
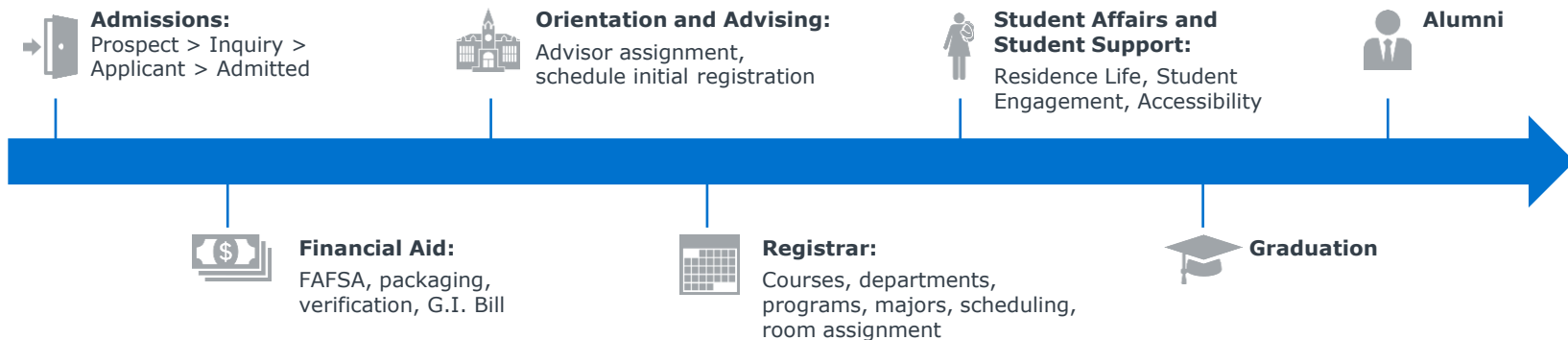
Awarding

- **Financial aid**: resources to assist students with the cost of education
- **Cost**: direct and indirect expenses assigned to enrollment for any given period
- **Expected Family Contribution (EFC)**: calculation derived by federal financial formula through the completion of the FAFSA
- **Need**: Maximum financial eligibility a student can receive based on Federal financial aid results

Need = Cost minus EFC

- **Merit aid**: Assignment of an institutional monetary support or award based on a student's academic performance at the time of entry. Merit aid can also fulfill students' 'need'
- **Need-Based aid**: Aid awarded based on the calculated need formula (see above)
- **Fund Code**: JCU indication of a particular type of funding (e.g., JCU Grant, Presidential Scholarship, Stafford Loans, etc.)
- **Source**: The source of the funding. (i.e., State, federal, institutional, endowed)
- **Type**: Nature of the funding including whether the funds are expected to be repaid. (i.e., Grant, scholarship, loan, student employment)

Undergraduate Students

Admissions:
Prospect > Inquiry > Applicant > Admitted

Orientation and Advising:
Advisor assignment, schedule initial registration

Student Affairs and Student Support:
Residence Life, Student Engagement, Accessibility

Alumni

Financial Aid:
FAFSA, packaging, verification, G.I. Bill

Registrar:
Courses, departments, programs, majors, scheduling, room assignment

Graduation

Basic Breakdown of Each Meeting

- Walk us through the data created and used during each step of interacting with students
- Discuss roadblocks you face in terms of accessing data
- Share about other campus units that need to know about your data

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Edify as the Heart of Campus Data

A Data and Analytics Solution to Empower Strategic Decisions

Bring Your Data Together
Access and Warehousing

*Cloud-native, secure, infinitely scalable **data lake and warehouse** to support critical institutional initiatives*

Build a Culture of Data Confidence
Data Governance

*Higher ed **best practice rules and validations** to ensure a golden record/single source of truth*

Empower Your Team with Insight
Reporting and Analytics

***Self-service, custom, and pre-built analytics** to drive efficiency and support decision-making*

Build Your Team's Capacity
Professional Services Hours

***EAB support** to meet you where you are. Your team's use of Edify can be self-service or partially or fully managed by EAB.*

| Strategy and Culture Support | Integration Services | Process Consulting | Data Science and Analysis |

Raise Your Hand!

Are you familiar with the Export Zone in Edify
and building exports?

myJCU Campus Portal as a Central Location for Information

Tabs Are Permissioned by Role (Employee or Student)

Knows who you are

Tabs based on identity

General announcement

Feeds from Google and Web RSS

Links to other campus systems

Identifying and Configuring the Data

Understanding What Data Is Needed

Identify the use case for the information and what data elements are required.

Identifying if What We Need Is in Edify

JCU's Edify instance continues to expand as new intake data sources are added and different uses are discovered.

Building the Export

Build the SQL to send information to myJCU.

Configuring the Delivery
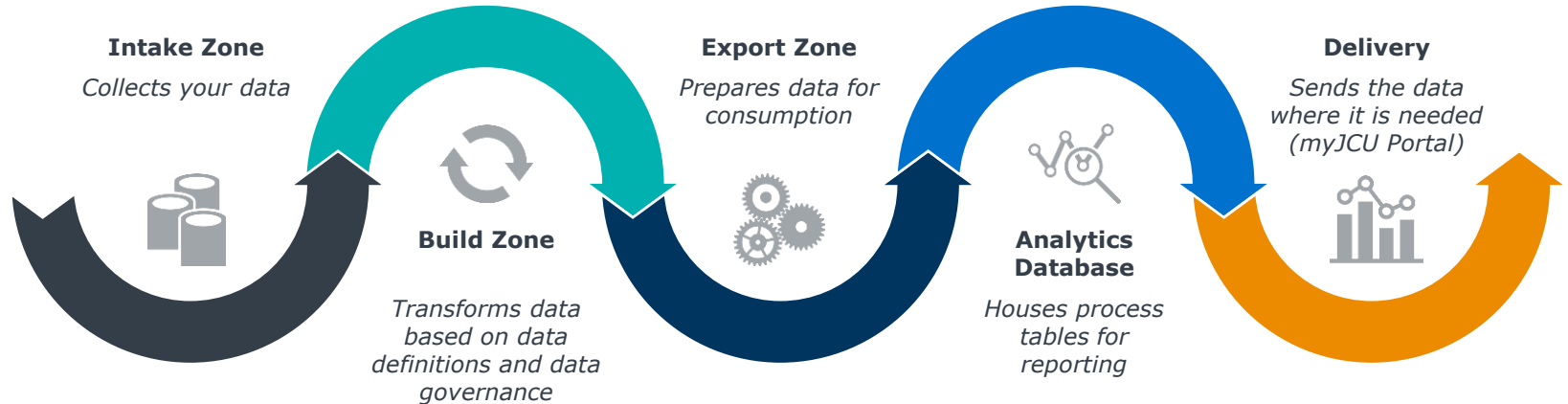
Identify where the data needs to go.

Export Mindset

Do as little data transformation as possible in Exports. Leave that to the Build Zone!

Edify Data Flows into the myJCU Portal

Bringing Together Disparate Data and Making It Consumable

Intake Zone
Collects your data

Build Zone
Transforms data based on data definitions and data governance

Export Zone
Prepares data for consumption

Analytics Database
Houses process tables for reporting

Delivery
Sends the data where it is needed (myJCU Portal)

JCU Data Definitions

- The functional output of Data Governance

Perspectives and Subtleties

- Different people with different views
- …down the rabbit hole!

Extend Existing or New Build Plan

- Does the addition fit into an existing plan's intention?
- How is it to be used?

Populate the Build Plan

- Build in layers
- Prototype in Database IDE and the Analytics Database

Edify Exports Supply Data for the myJCU Portal

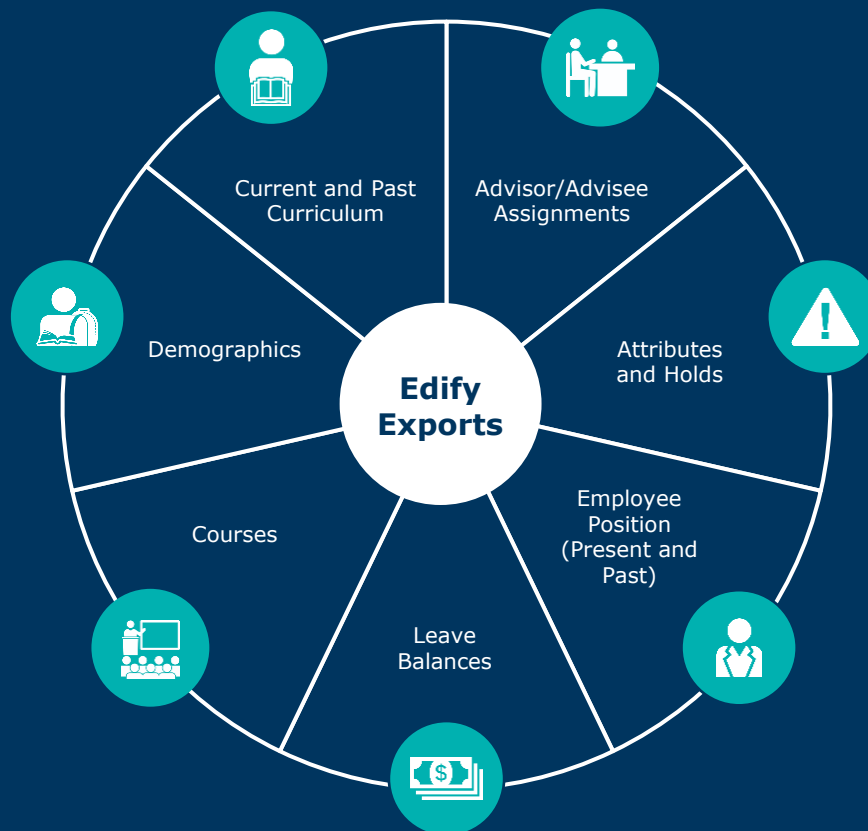**Self-Service Resources on the myJCU Portal**

☑ Includes:
- Communications
- Forms and workflows
- Academic and Employee Services

☑ Bridges the gap between Admissions and Advancement

Current and Past Curriculum
Advisor/Advisee Assignments
Demographics
Attributes and Holds
Courses
Employee Position (Present and Past)
Leave Balances

Edify Exports

Curriculum History
- New Build Plan
- Needs to include multiple changes within a term
- Created link from student_term_level

"Fixing" Definitions
- Original Build Plans needed "tweaking"
- "No good plan survives first contact with the ~~Enemy~~ Use Case"

{{person_affiliation}}1 The "is_" Table
- New Build Plan
- How a person is affiliated
- Simple to join
- "Current State"
- Did not want to over-widen employee, person, and student plans
- Is_student, is_employee, is_current_advisor, is_advisor, etc.

1) Represents the different ways a person can be identified at JCU.

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Streamlined Reporting with Edify

How would you describe reporting at your institution?

Chaotic, each office produces mismatched numbers

0%

Manual, IR/IE Office manages all data requests

0%

Streamlined, easy for users across campus to access data

0%

Mix of a and b!

0%

Edify Workspaces Support Key Academic and Admissions Reporting

Validating JCU Data Through the Edify Build Process

Faculty Reporting

- Previously: Reports were printed during fall and spring terms to create "The Book" (pictured above)
- New Edify Dashboard: Data visualizations create data accessibility and ability to pull data more regularly

LMS Utilization

- Previously: Limited insight into LMS use across campus
- New Edify Dashboard: Analytics to uncover LMS utilization trends, student engagement, and more
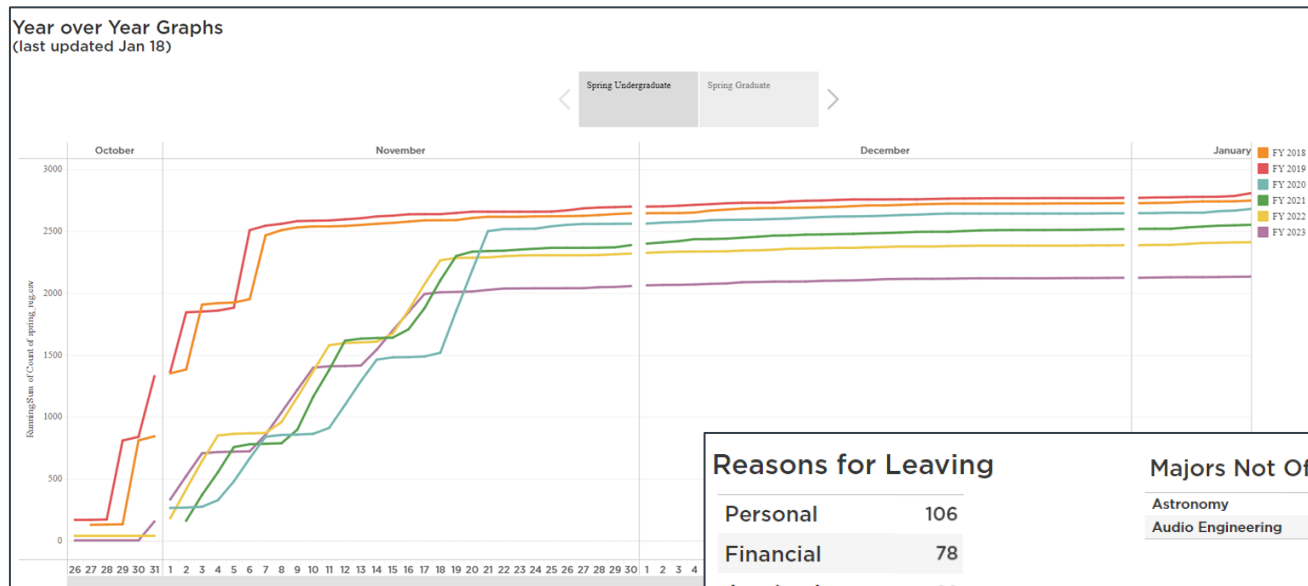
Enrollment Reporting

- Previously: Manual creation of weekly "Portents of Enrollment" report
- New Edify Dashboard: Data model supports weekly enrollment reporting visualizations

Closely Monitoring Retention

Time-Consuming and Manual Process

Downloaded four Argos reports

Previous Process

Exported from PowerPoint to PDF

Ran an R Script by creating CSV files (Tableau data sources)
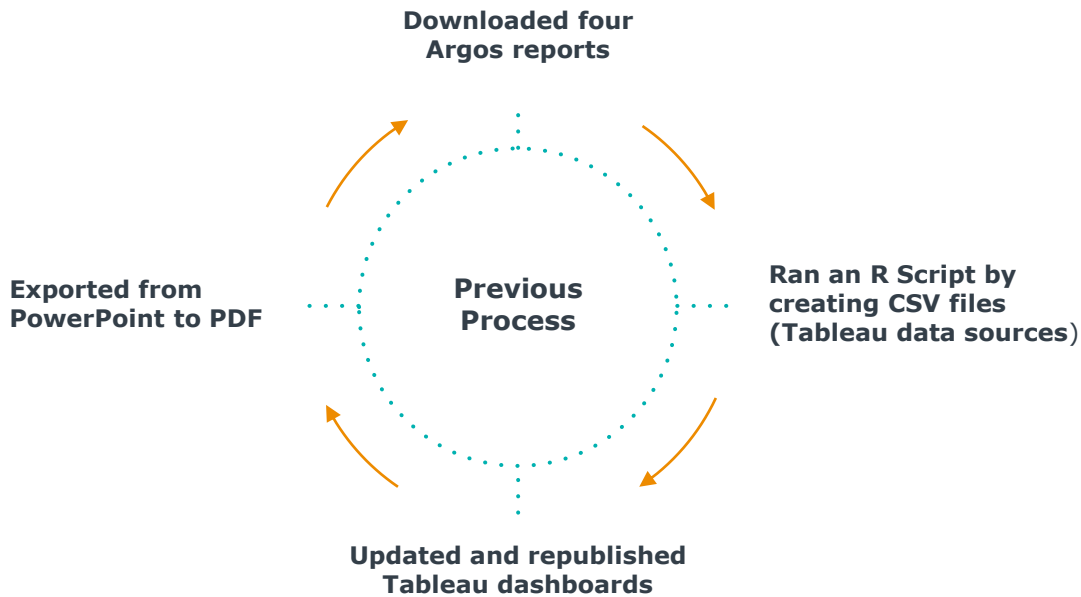
Updated and republished Tableau dashboards

Saving Time by Giving Users Access to the Data

**Downloaded four
Argos reports**

**Gave Users Access to
Tableau Dashboard**

- Taught users to interact
  with Tableau Server
- Email included links to
  Tableau Server instead
  of the PDF

**Previous
Process**

**Ran an R Script by
creating CSV files
(Tableau data sources**)
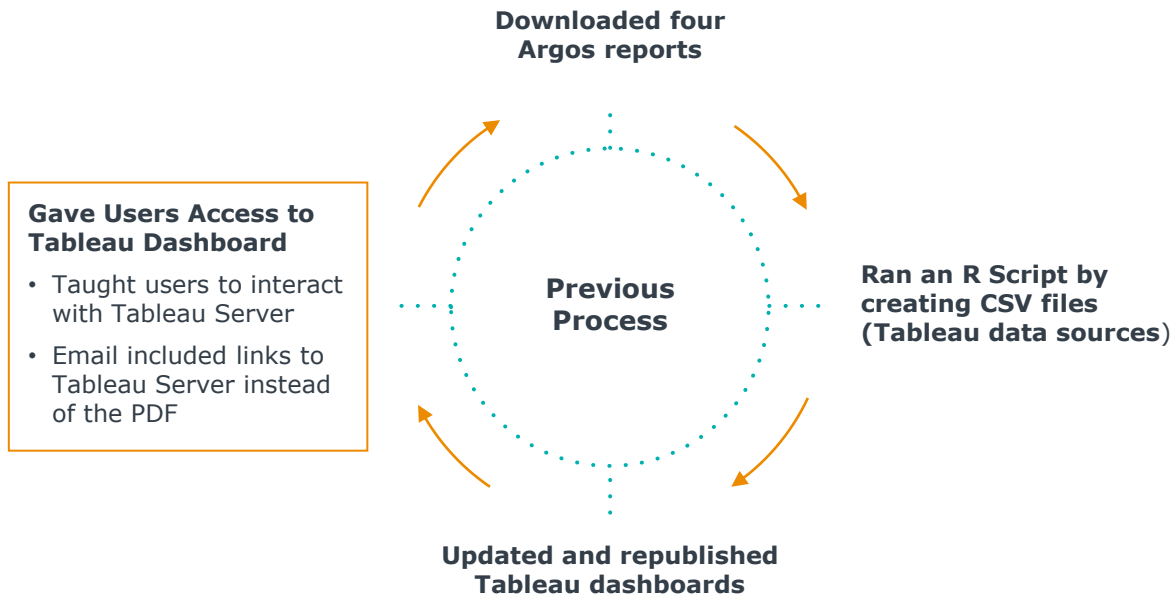
**Updated and republished
Tableau dashboards**

Using Rapid Insight Construct to Organize Data

Process

Export CSVs from Tableau

Reports with registration status, student type, graduation date, and withdrawals data
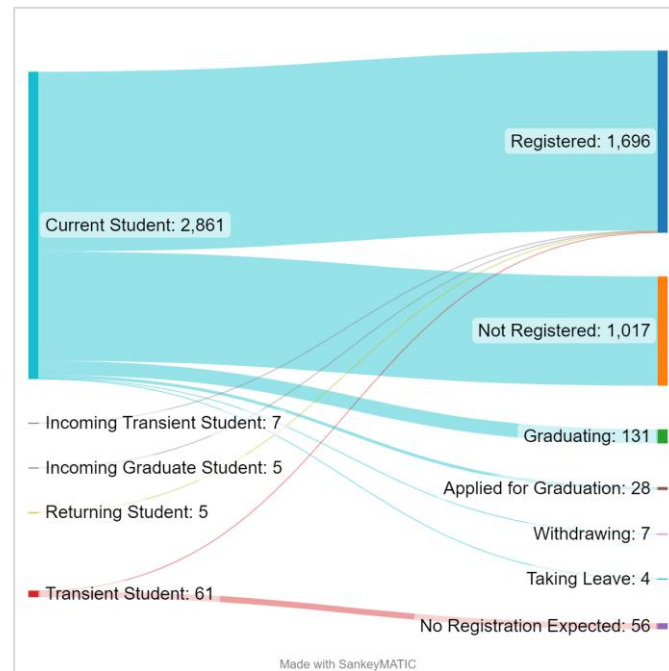
Run Rapid Insight Construct Job

Exports are combined and categorized where students started and stopped, summarizing how many years are in each flow of data
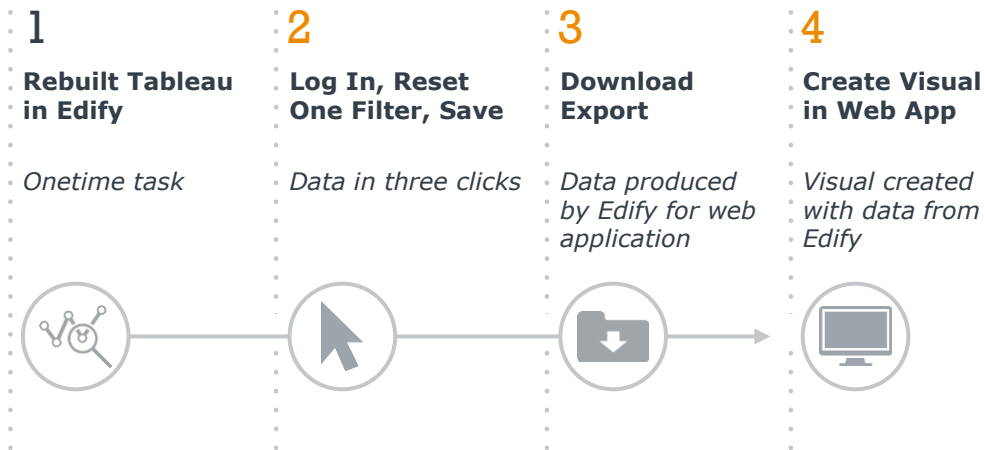
Use Web App to Create Data Visual

Sankey diagram shows if students by type have registered, are graduating, applied for graduation, withdrew, took leave, etc.

Data Visual Created with Web App

Registered: 1,696

Current Student: 2,861

Not Registered: 1,017

Incoming Transient Student: 7

Incoming Graduate Student: 5

Returning Student: 5

Graduating: 131

Applied for Graduation: 28

Withdrawing: 7

Taking Leave: 4

Transient Student: 61

No Registration Expected: 56

Made with SankeyMATIC

Source: John Carroll University; EAB interviews and analysis.

1

Rebuilt Tableau in Edify

Onetime task

2

Log In, Reset One Filter, Save

Data in three clicks

3

Download Export

Data produced by Edify for web application

4

Create Visual in Web App

Visual created with data from Edify

Entry Point for Stakeholders to Use Edify

Train users to access Edify and use the "Portents" dashboard to inform their work
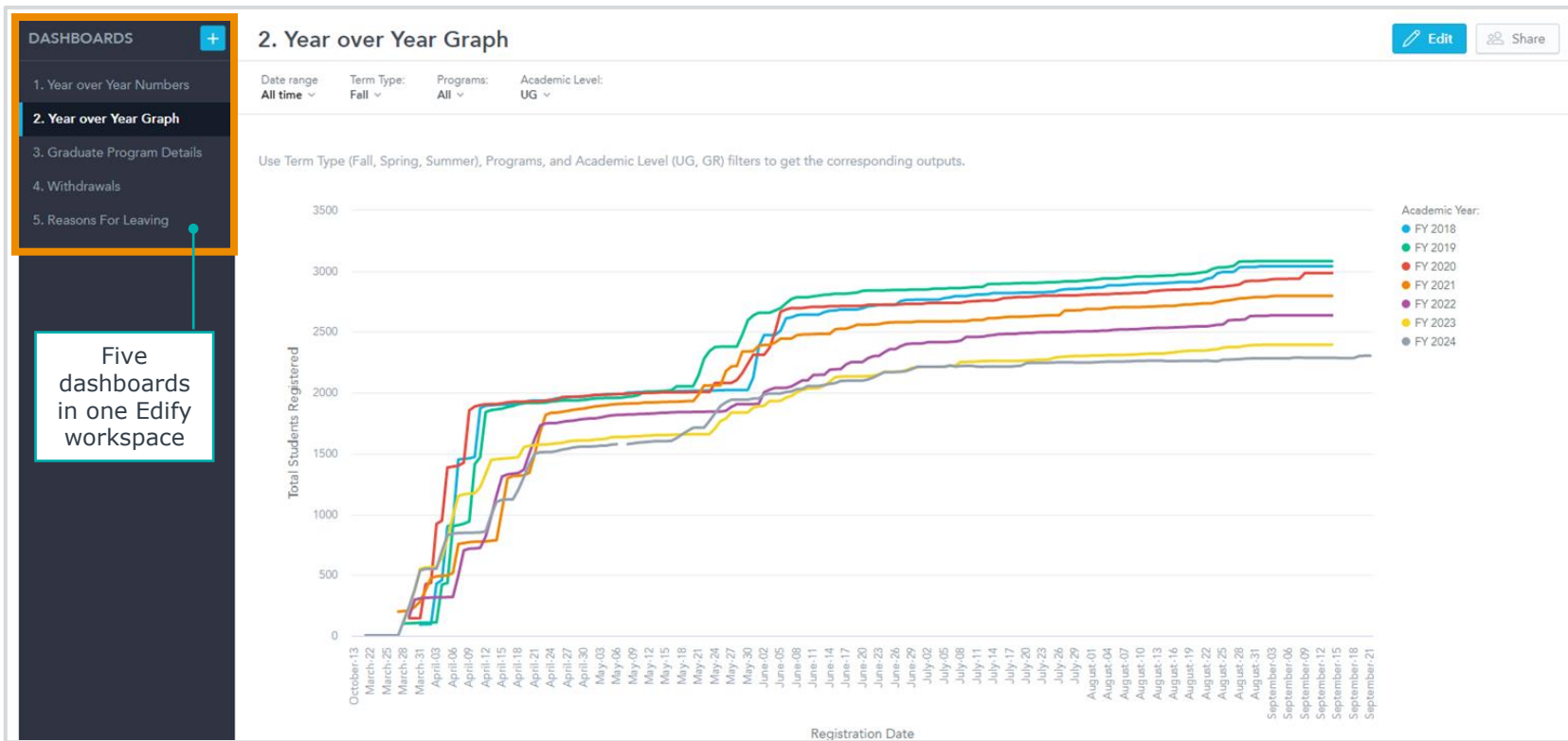
Impact

45-60 min
Time Saved Each Week

2-3 hours
Setup Time Saved Each Term

82
Individuals Receive Portents Data

Five dashboards in one Edify workspace

Provides Accurate Student Count

Sankey diagram includes only students eligible to register, allowing users to see how many haven't registered.

Enables Data-Informed Course Decisions

The data, coupled with the APS CPO dashboard, helps individuals monitor course demand and ensure efficiencies.

Challenges Assumptions

The data validates and challenges assumptions about how enrollment is trending, etc.

Enhances Transparency

Relevant individuals are more looped into the process and know what's happening.

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But What's It Really Like?

Meet Users Where They Are

Newsletter Approach "Training Tidbits"

Offer an opt-in option to receive bite-sized training, opportunity to link to additional resources, just-in-time messages (sync training with user's needs right now)

Archived Instructions in Multiple Forms

Consider use of annotated screenshots, text, and screen-capture video with captions

Workshops and One-on-One Consults

In-Person is nice for tech-shy folks; remote can be quick and easy

Approach

- This is a situation that calls for a teaching/learning mindset!

- Consider partnering with data/analytic faculty, ITS Training staff, Faculty Development/Teaching and Learning offices

Training and Educational Materials

Training Tidbit from Institutional Effectiveness

TABLE OF CONTENTS

DATA ACCESS

The Analytics Server (Tableau)

Logging In and Getting Around

Filters and Interactions

Courses (by Subject)

Courses (by Instructor)

Courses (Breakouts)

Faculty

Majors, Minors, and Concentrations at Graduation

Major/Minor Combinations at Graduation

Majors, Minors, and Concentrations Each Term

Key Metrics

    Credit Hours, Sections

    Majors, Minors, and Concentrations at Graduation

    Majors, Minors, and Concentrations Each Term

    Individual Faculty Teaching Load Analysis (SCH/FTE)

    Department Teaching Load Analysis (SCH/FTE)

    Share of Credit Hours and Sections Taught by Full-Time Faculty

Academic Performance Solutions (EAB)

Logging In, Getting Around, and Getting Help

Filters and Interactions

Course Planning Optimization: Registration Status

Course Planning Optimization: Course Planning & Course Analysis

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Portents of Fall Enrollment as of Aug 9 ➤

Todd Bruce <rbruce@jcu.edu>   Wed, Aug 9, 8:57 AM ☆ ↩ ⋮

to Data, Alan, Paul, Bonnie, Edward, Sherri, Robert, Ryan, Naomi, Brian, Carolyn, Colleen, Mike, Laura, Melissa, Rodney, Ela ⌄

Portents of Fall Enrollment

Good morning,

This is your weekly update email. For more information about this email series or the links below, please check the link at the end of the message, or ask me for more information!

tl;dr? A bit of a broken record, I guess: both undergraduate and graduate registrations are still close to last year at this time. Strictly speaking, undergrads are 2.4% down and grad is up 1.7%.

To investigate further, please consult the dashboards listed below in Edify:

- Year over Year Numbers
- Year over Year Graphs
- Graduate Program Details
- Withdrawals
- Reasons for Leaving

The Sankey diagram is below:

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Q&A

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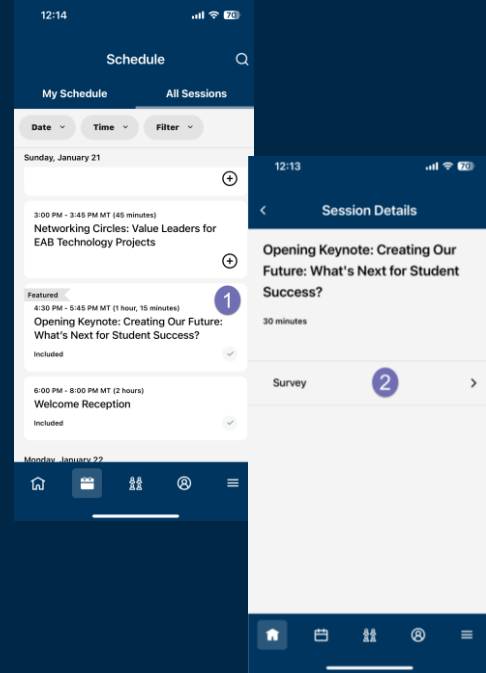Associate Director, Technology Partner Experience

EAB

Complete Session Evaluations

Your feedback is important to us, please take a few moments to **tell us about your CONNECTED experience**.

Evaluations are available in the event app by clicking on a session and then clicking **Survey.**

Need help with the app?

Stop by the **information desk!**

Next Up: Lunch!

Head straight to Aurora Ballroom A located on the 2nd floor.

Lunch is being served family style – it'll be ready for you at your table.
Refer to your badge to locate your table number. There will be staff on hand to help direct you.