

**ADMINISTRATIVE DEPARTMENT REVIEW
Office of Institutional Effectiveness (IE)
2019 Annual Report**

Report submitted June 13, 2019

The Office of Institutional Effectiveness participated in the Administrative Unit Review process in 2017-18. Two goals, with one outcome each, were identified. The following report outlines the progress made in achieving both established outcomes during the 2018-19 academic year.

GOAL/OUTCOME 1

IE Goal 1: Improve College efficiency by providing data in a more accessible and secure interactive, online environment.

IE Outcome 1: Complete a pilot project in three years with **Tableau Server** and assess, both qualitatively and quantitatively, the impact/effect of upgrading the Tableau environment.

The **Tableau Server Pilot** was initiated August 2018 as an upgrade to Tableau Public to enhance institutional reporting and analysis by providing a secure environment to share reports and allow greater data access to users. The pilot will determine if Tableau Server is a viable business intelligence solution for the College and will be evaluated on the following three goals:

Goal 1: Provide a secure environment to display reports and analyses

Goal 2: Allow greater data access to users

Goal 3: Increase the ability to make better-informed decisions

6a. Measurement Tool and Timeline – Tableau Server

Measurement Tool: Tableau Server Pilot Project Plan & Feedback Survey

Timeline: Broken out into three separate years with year-one provided below

Year 1 (2018-19) Tableau Server Pilot Project Tasks : Set up, Test, Train, Develop	
Sept 2018	1. Set up Tableau Server, set up security model, assess security
Oct 2018	2. Communicate Pilot Plan to stakeholders, get feedback and endorsement
Nov 2018	3. Develop Title III analyses
Feb 2019	4. Train pilot group
April 2019	5. Evaluate if Tableau Server provides end users greater access to data, and allows end users to make better-informed decisions -- survey end users
May 2019	6. Report year end summary to stakeholder and campus
June 2019	7. Re-subscribe original 10 licenses and any additional users

7. Data – Tableau Server

Project plan w/ task list (above): To best implement this project, a task list was established to direct and monitor progress. Pros/Cons noted with various tasks in order to help with assessment.

Survey: Members of the pilot project team surveyed.

8. Summary and Analysis – Tableau Server

On a formative level, the project plan tasks 1-5 were successfully completed with tasks 6-7 taking place from now through August 2019. The feedback survey results were also helpful and are woven into a summary analysis of the three pilot goals below:

Goal 1: Provide a secure environment to display reports and analyses

User security set up for the 10 pilot users was straightforward (Tutorials from Tableau helped). Tableau Server allows for many levels of security to be set - user level down to data field level. Managing users and projects is straightforward with the small pilot group.

Next Steps: Work with IT to ensure that a stout security model is developed in order to scale to more users. Test security levels at the data field level. Attend a Tableau Server Administrator workshop at Tableau Conference 2019 to develop best practices for managing many users and projects.

Goal 2: Allow greater data access to users

Data access has increased for the Tableau Server Pilot group. They can look up information quickly and share with department. The visuals have given them different perspectives on the data. It allows them to easily investigate questions without having to rely on IE to provide data.

Data can be downloaded from Tableau Server. Two of the ten pilot members download data regularly (mostly for sorting and tracking). This feature is great as it provides users even more data access. It isn't so great in that the data can be downloaded from any computer (home or work). This feature can be disabled within Tableau Sever security settings, but it is a feature some users really like.

Next steps: Develop more analyses so all Pilot members can utilize Tableau Server. Work with Tableau and IT to determine how to limit the downloading of data to just COCC computers.

Goal 3: Increase the ability to make better-informed decisions

Tableau server has increased ability for a few of the pilot members who use Tableau a lot. For those pilot members who are not using it as much it has 'stayed the same'. Those who use it a lot find that they can better plan for future terms or make timely adjustments. Those who use it rarely have trouble with reading the different analyses or using Tableau's functionality.

Next steps: Provide more trainings in order for pilot members to understand their analyses. Make clearer notes on analyses or create a cheat sheet on how to use Tableau server and analyses. Develop analyses for all pilot members.

GOAL/OUTCOME 2

IE Goal 2: Provide a more secure and professional platform for College survey efforts.

IE Outcome 2: Complete the **Qualtrics** pilot project and assess, both qualitatively and quantitatively, the impact/effect of upgrading the College's survey support environment.

The **Qualtrics Pilot** was initiated January 2018 to increase the security and integrity of survey data. The pilot will be evaluated using the following six goals:

Goal 1: Data security and confidentiality

Goal 2: Surveys will be easily created from an existing Word or Excel document

Goal 3: Increased efficiency summarizing data and presenting results

Goal 4: Consistency and quality of surveys and research data

Goal 5: Individual formatted questions easily shared between surveys

Goal 6: Ability to report on and track surveys

6a. Measurement Tool and Timeline - Qualtrics

Measurement Tool: Qualtrics Pilot Project Plan

Timeline: Plan is broken out into a series of tasks leading to a recommendation.

Year 1 (2018-19) Qualtrics Pilot Project Tasks	
Jan 2018	1. Purchase, set-up, and testing efficiency and security of the permissions model.
Feb 2018	2. Handoff to Placement Pilot stakeholders and distribution of first faculty survey.
Mar-Jul 2018	3. Survey Monkey Migration and distribution of select Title III surveys.
Jul-Nov 2018	4. Handoff to Continuing Education and documentation of lessons learned.
Dec 2018-Jul 2019	5. Maintenance and evaluation
Jul 2019	6. Recommendation
Aug-Nov 2019	7. Budget preparation based on recommendation

7. Data - Qualtrics

Project Plan w/ task list (above): In order to implement this project, a task list was established to inform the efficient implementation of the tool, timely assistance of users, and allow for evaluation of the individual project goals.

Support call log: The documentation of technical support calls and user issues is continuous and the status of each item reviewed monthly to determine if it is a training issue or an issue with the actual tool.

User Satisfaction Survey: Results of user satisfaction surveys will be analyzed and all data will be compared with the desired outcomes of each project goal.

8. Summary and Analysis – Qualtrics

On a formative level, the project plan tasks 1-4 were successfully completed. The pilot is currently addressing task 5, maintenance and evaluation phase of the pilot. Training has and will continue to be conducted one-on-one by the survey tool administrator until the pilot is concluded and a recommendation has been made. While documentation of feedback from users has been ongoing, 26 users and 23 collaborators will be asked for feedback fall 2019 to determine their satisfaction with ease of use, features and reporting capabilities. IE will analyze the feedback of users and prepare a recommendation for the VP of Administration, task 6.

An assessment of where the pilot project is in relation to the set goals below:

Goal 1: Data security and confidentiality – Complete

Setup of tool was easy and permissions options follow industry standards. Use of LDAP to login to the tool with COCC network credentials has solved the security issues associated with sharing passwords. Users can no longer send surveys under another users email address. The tool also allows the survey administrator to identify survey owners, transfer surveys between owners and disable the accounts of terminated employees without loss of survey designs or collected data. Monitoring of survey traffic is moderately difficult to establish but useful.

Goal 2: Surveys will be easily created from an existing Word or Excel document – Complete

Complete and successful Import of entire surveys from Word and Excel is difficult. A template for importing survey designs was built to aid the process, but the recommendation is this should be limited to advanced users that have the time to learn the process. The tool does not contain an import wizard. Successful copy and paste of individual questions into Qualtrics surveys requires the original document not contain html formatting. Text copied from web pages contains style sheets and embedded script that produce negative results. The recommendation is to have users build their question within Qualtrics.

Goal 3: Increased efficiency summarizing data and presenting results – partially complete

Survey data is easily exported to .csv for use in Tableau or Excel. Creation of custom exports can limit the need for data wrangling in Tableau, but requires more time from the typical survey user. Reporting satisfaction has with users varies. More formal collection of satisfaction levels will be needed.

Goal 4: Consistency and quality of surveys and research data - partially complete

ADA Compliance has been enforced at the administrative/Brand level of the tool. Establishment of a single survey theme ensures all surveys are created using a consistent look and distributed under one address that legitimizes the survey. More work is needed to develop standardized questions and survey templates .

Goal 5: Individual formatted questions easily shared between surveys – complete

Users can easily import questions from their own surveys, templates, libraries or other user surveys.

Goal 6: Ability to report on and track surveys – complete

The survey administrator dashboard easily allows for export of survey statics by user, group or division. Actions can be setup with moderate ease to inform the administrator or survey owner of distributions and survey completions.

It is vitally important to note that the IE Qualtrics Pilot was drastically impacted by the decision to use Qualtrics as the distribution tool for Directed Self Placement. This decision was made after launching the IE Pilot and an assessment related to DSP will be made available from the Placement Task Force.

Summary and Analysis – IE Overall

In reviewing the year-one accomplishments of each of the two IE goals/outcomes, we did accomplish what we set out to do. As mentioned above, the IE Qualtrics Pilot was impacted by the decision to use Qualtrics as the distribution tool for Directed Self Placement. This development put a lot of pressure on the IE Research Specialist to get Qualtrics up and running and well supported quickly. It has prompted good discussion as to how to best license and support Qualtrics for multiple institutional needs.

Next steps have been identified for Tableau Server and are in the process of being identified for Qualtrics. At the time of preparing this summary, IE is without a Research Specialist and will need the support of the College to ensure adequate staffing to maintain and grow both pilots.

Both pilots are also funded by Title III so a next step will be determining how to move them over to the general fund in a sustainable way. This will include research cost-sharing and other funding options.

Both pilots have supported the IE mission of fostering college-wide continuous quality improvement by supporting research, planning and assessment efforts.