

# Executive Summary

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## Blueprint for Academic Excellence Office of Institutional Research, Assessment and Analytics AY2021-2022

### Highlights

During AY2019-20 the office significantly ramped up institutional effectiveness, continuous compliance and accreditation efforts in preparation for submission of the SACSCOC reaffirmation report in Fall 2020. Those efforts will continue during AY20-21 in preparation for the reaffirmation campus visit in Spring 2021. In October 2019 the BOT approved a system BI initiative. OIRAA staff played and will continue to play a lead role in helping to validate data, promote, train, and advocate for continued use of institutional data. As part of this initiative, the university gained a leading data visualization tool, Tableau and OIRAA will help lead the institution towards actionable data insights.

### Mission Statement

OIRAA's mission is to carry out the following basic responsibilities: Coordinate and monitor compliance activities for institutional accreditation; Provide institutional data and assessment findings for external reporting; Provide institutional data and findings from research and assessment to support institutional planning processes. Our philosophy is that information should be timely, accurate, and easily accessible.

Updated: 01/08/2019

### Vision Statement

Updated: 01/08/2019

### Values Statement

- \* All OIRAA information should be timely, accurate, and easily accessible.
- \* Make procedures and reports consistent, and yet also be responsive to changing internal and external demands.
- \* Committed to a high degree of integration among planning, assessment, and institutional research in order for the University to maintain excellence in teaching, research, and public service.

Updated: 01/08/2019

# Table Of Content

|   |    |
|---|----|
| <b>Executive Summary</b> .....                    | 1  |
| Highlights .....                                  | 1  |
| Mission Statement .....                           | 1  |
| Vision Statement .....                            | 1  |
| Values Statement .....                            | 1  |
| <b>Goals - Looking Back</b> .....                 | 3  |
| <b>Goals - Real Time</b> .....                    | 11 |
| <b>Goals - Looking Ahead</b> .....                | 19 |
| <b>Programs or Initiatives</b> .....              | 23 |
| Effective Programs or Initiatives .....           | 23 |
| Program Launches .....                            | 23 |
| Program Terminations .....                        | 23 |
| Program Rankings .....                            | 23 |
| Supplemental Info - Programs or Initiatives ..... | 23 |
| <b>Initiatives and Fees</b> .....                 | 24 |
| Initiatives .....                                 | 24 |
| Fees .....  | 24 |
| <b>Community Engagement</b> .....                 | 25 |
| Community Perceptions .....                       | 25 |
| <b>Collaborations</b> .....                       | 26 |
| Internal Collaborations .....                     | 26 |
| External Collaborations .....                     | 26 |
| <b>Campus Climate and Inclusion</b> .....         | 27 |
| Campus Climate and Inclusion .....                | 27 |
| <b>Concluding Remarks</b> .....                   | 28 |
| Weaknesses and Plans for Improvement .....        | 28 |
| Key Issues .....                                  | 28 |
| Quantitative Outcomes .....                       | 28 |
| Cool Stuff .....                                  | 28 |
| <b>Appendix 1. Programs or Initiatives</b> .....  | 30 |

# Goals - Looking Back

## Goal 1 - AY19-20 Provide timely and accurate data

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| <b>Goal Statement</b>                             | Continue to enhance and add additional means for constituents to access timely and accurate data that supports both internal and external reporting needs.   |
| <b>Linkage to University Goal</b>                 | <ul style="list-style-type: none"> <li>• Provide a sustainable campus infrastructure that supports academic excellence and preeminent student life.</li> </ul>   |
| <b>Alignment with Mission, Vision, and Values</b> | <p>Our mission states that we operate with the following basic principles:</p> <p>Provide institutional data and assessment findings for external reporting;</p> <p>Provide institutional data and findings from research and assessment to support institutional planning processes.</p>  |
| <b>Status</b>                                     | Progressing as expected (multi-year goal)  |
| <b>Action Plan</b>                                | Improve the time it takes to finalize CHE data files and the time it takes to publish data to the website. Develop new methods to provide data sets for Blueprints and Academic Program Review in an on-line format. Partner with college "power users" to get input and support. Work collaboratively with other units to help support their data and information needs.  |
| <b>Achievements</b>                               | <ul style="list-style-type: none"> <li>* The timeliness of CHE data file submissions has improved and stronger documentation created;</li> <li>* Several "dashboards" developed to support planning and reporting, in particular, Academic Program Review; the university acquired a site license for Tableau in October 2019, as such, these dashboards were rolled out to key groups and to program coordinators involved in the program review process Spring 2020);</li> <li>* Multiple formal and informal conversations have been held with college "power users" to get input on the development of robust data sets and dashboards to support various reporting initiatives;</li> <li>* Development of internal tracking of degree assessment progress was accomplished in Fall 2019;</li> <li>* Development of Accountability metric reports was augmented;</li> <li>* During 2019 a significant amount of time went into validating the HR data coming from PeopleSoft and helping HR staff with conversion data issues;</li> <li>* Fall 2019 a significant amount of time has gone into developing new means for acquiring facilities data as part of the mainframe shutdown initiative;</li> <li>* For OIRAA website, created new Calendar page to highlight reporting timelines.</li> </ul> |

# Goals - Looking Back

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| <b>Resources Utilized</b>  | Existing budget and personnel.   |
| <b>Goal Continuation</b>   | Yes. It is critical the the University have access to timely and accurate data. Now with the HelioCampus project advancing and more experience with Tableau, the office will continue to seek out new and improved ways to provide data and information. |
| <b>Goal Upcoming Plans</b> | See AY20-21  |
| <b>Resources Needed</b>    | Additional personnel.  |
| <b>Goal Notes</b>          | Spring 2020 activities were impacted by COVID and staff settling in to working remotely. In addition, a different set of demands was placed on members of the OIRAA staff to participate and support Future Planning Group efforts.                      |

# Goals - Looking Back

## Goal 2 - AY19-20 OIRAA will support system-wide continuous compliance and accreditation strategies

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| <b>Goal Statement</b>                             | USC-Columbia's 10-yr Reaffirmation Report will be due in September 2020. An institution-wide effort is now underway to engage university constituents in efforts related to developing a continuous compliance strategy to support institutional effectiveness and accreditation. Embedded within this goal are numerous IE activities that both affect and support the reaffirmation efforts, including Carolina Core, QEP and Academic Degree Program assessment activities.   |
| <b>Linkage to University Goal</b>                 | <ul style="list-style-type: none"> <li>• Provide a sustainable campus infrastructure that supports academic excellence and preeminent student life.</li> </ul>   |
| <b>Alignment with Mission, Vision, and Values</b> | This directly aligns with the OIRAA mission and values. In addition, the Director of Institutional Effectiveness and Accreditation is the SACSCOC liaison.   |
| <b>Status</b>                                     | Progressing as expected (multi-year goal)  |
| <b>Action Plan</b>                                | <p>Continue to work with the SACSCOC Executive Steering Committee and key university constituents to draft and finalize standards in preparation for the Reaffirmation Report due in September 2020.</p> <p>Continue to evolve and develop new ways to improve assessment reporting, tracking and communication practices.</p> <p>Work with key university personnel to help develop and asses a (new) Quality Enhancement plan.</p>   |
| <b>Achievements</b>                               | <ul style="list-style-type: none"> <li>* Meetings with all 14 (standards) groups concluded in Fall 2019 and writing began in earnest during AY19-20. Significant time and effort spent working with staff to finalize each standard.</li> <li>* Provided regular status updates to senior leadership on progress for the reaffirmation report.</li> <li>* SACSCOC Liaison worked closely and collaboratively with senior leadership and BOT personnel to address the SACSCOC Monitoring Report.</li> <li>* Finalized Business Process Manual for Degree Program Assessment and posted to website and implemented changes to Palmetto College's assessment reporting activities that support Carolina Core and degree program assessment.</li> <li>* Developed a website containing summaries, rubrics and reports of assessment results collected for all ten areas of the Carolina Core since 2013. Spring 2020, an executive summary from each meeting was compiled in the form of a Carolina Core Synthesis of Faculty</li> </ul> |

# Goals - Looking Back

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|                            | <p>Sentiment document.</p> <p>* Developed faculty roster for Spring 2019, Fall 2019, and Spring 2020. OIRAA worked closely with the HR contacts for each of the colleges and schools to ensure that the required credential documentations were on file.</p>   |
| <b>Resources Utilized</b>  | time, personnel and budget   |
| <b>Goal Continuation</b>   | yes, see AY20-21 goal  |
| <b>Goal Upcoming Plans</b> | <ul style="list-style-type: none"> <li>* Finalize and submit the SACSCOC Reaffirmation Report and the Monitoring Report.</li> <li>* Prepare for onsite (or virtual) visits.</li> <li>* Initiate the process for acquiring a replacement tool for Assessment Plan Composer.</li> <li>* Evaluate current Faculty Roster tool in light of problems encountered during reaffirmation submission.</li> </ul>  |
| <b>Resources Needed</b>    | Funding for new Assessment tool (s)  |
| <b>Goal Notes</b>          | <ul style="list-style-type: none"> <li>* Spring 2020 activities were impacted by COVID and staff settling in to working remotely. In addition, IE OIRAA staff had to take on additional writing for SACS standards to help support leadership that were actively involved in Future Planning Group activities.</li> <li>* Spring 2020 - In addition, significant data collection took place to ensure that the university had all the necessary documentation available to support our extensive SACSCOC faculty roster. These efforts were led by Ms. Brittany Ashley.</li> </ul> |

# Goals - Looking Back

## Goal 3 - AY19-20 Provide constituents access to official university data

|   |   |
|---|---|
| <b>Goal Statement</b>                             | University data must be regarded as a strategic asset using modern business intelligence tools, platforms and analytics capabilities. Continue to enhance and add additional means for constituents to access official university data. This goal will take into consideration such things as “who”, “what”, “where”, “when” and “why” a constituent would be accessing official university data and necessary security measures to protect university data (and personally identifiable information).  |
| <b>Linkage to University Goal</b>                 | <ul style="list-style-type: none"> <li>• Provide a sustainable campus infrastructure that supports academic excellence and preeminent student life.</li> </ul>  |
| <b>Alignment with Mission, Vision, and Values</b> | <p>Our mission states that we operate with the following basic principles:</p> <ul style="list-style-type: none"> <li>• Provide institutional data and assessment findings for external reporting;</li> <li>• Provide institutional data and findings from research and assessment to support institutional planning processes</li> </ul>   |
| <b>Status</b>                                     | Progressing as expected (multi-year goal)   |
| <b>Action Plan</b>                                | Further partnerships with colleges, the Division of Information Technology and other service units to establish best practices for accessing official university data. OIRAA will launch data visualizations to support Academic Blueprints and Program Review which focus on official university data.   |
| <b>Achievements</b>                               | <ul style="list-style-type: none"> <li>* worked closely with DMSB, CEC, as well as the AVP for Student Affairs to provide institutional data and seek inputs on newly developed data visualizations related to cohort retention and graduation rate reporting;</li> <li>* worked with multiple units to provide core data to support Academic Program Review using newly developed data sets and dashboards; launched spring 2020;</li> <li>*improved timeliness to provide data for Academic Blueprints;</li> <li>* responded to over 65 data requests submitted through the online ticket system. Many more data requests are fulfilled that are not submitted through the ticket system.</li> <li>* Partnered with DoIT (Chief Data Office and Business Strategist) to convene the system-wide Business Intelligence Council and the BI Community of Practice (both led by OIRAA staff and are part of the HelioCampus initiative which was approved in October 2019);</li> <li>* Completed the migration of the OIRAA website to OU Campus;</li> <li>* Launched Executive Enrollment dashboard in Late Spring 2020;</li> <li>* Provided data support for Future Planning Groups.</li> </ul> |
| <b>Resources Utilized</b>                         | time, personnel and budget  |

# Goals - Looking Back

|                            |   |
|----------------------------|---|
| <b>Goal Continuation</b>   | yes, see AY20-21 goal   |
| <b>Goal Upcoming Plans</b> | Over the past several years, in addition to "routine" data provided, the OIRAA office will continue supply official data to support such initiatives as: University Strategic Plan, new budget model, American Talent Initiative, Academic Analytics, EAB, Rankings, COACHE and others. During AY20-21 and beyond, we expect to make improvements in the delivery of data to support these initiatives. |
| <b>Resources Needed</b>    | Additional personnel.   |
| <b>Goal Notes</b>          |   |



# Goals - Looking Back

## Goal 4 - AY19-20 OIRAA staff support best practices in institutional research and institutional effectiveness

|   |   |
|---|---|
| <b>Goal Statement</b>                             | <p>During the coming year the office has committed to engaging in a process to review peer IR/IE websites to identify best practices for displaying institutional data/information and improved means for delivering data (i.e., how are data requests handled, what type of data visualizations are provided, etc.). Further, we have committed to a process of sharing current higher education happenings in the form of a shared reading folder and monthly article reviews during staff meetings to help each other stay abreast of higher ed policies and initiatives. With the increased budget received last year, we will continue to support pertinent and relevant professional development activities.</p>  |
| <b>Linkage to University Goal</b>                 | <ul style="list-style-type: none"> <li>• Provide a sustainable campus infrastructure that supports academic excellence and preeminent student life.</li> </ul>  |
| <b>Alignment with Mission, Vision, and Values</b> | <p>Having staff that function well together in conjunction with staff that have the necessary knowledge, skills and abilities is the only way that the office will be able to achieve its mission and set the office on a course to be a leader in institutional research and assessment.</p>   |
| <b>Status</b>                                     | <p>Progressing as expected (multi-year goal)</p>  |
| <b>Action Plan</b>                                | <p>Staff will continue to engage in cross-training activities and participate in team-building activities;<br/>         Staff will attend professional development opportunities (internal and external to USC);<br/>         Monthly rotating professional article review;<br/>         Monthly rotating IR/IE website review;<br/>         Schedule summer "summit" with USC system SACSCOC liaisons to discuss best practices and lessons learned from recent SACSCOC reviews;<br/>         Schedule a fall USC system-wide meeting IR personnel to discuss compliance reporting and other data/information sharing topics.</p>  |
| <b>Achievements</b>                               | <ul style="list-style-type: none"> <li>* Facilitated annual gathering of USC System SACSCOC liaisons with the USC system IR/IE personnel. Meeting took place in early August 2019.</li> <li>* Staff participated in monthly staff meetings by reviewing a peer IR/IE website and by discussing a professional and timely article during first half of AY19-20. We modified our online meetings when staff were working remotely due to COVID.</li> <li>* Developed a rotation schedule for staff that submit CHE and IPEDS data files to further cross-train staff.</li> <li>* Staff participated in HR-sponsored training activities as well as attend professional meetings and present at professional conferences:             <ul style="list-style-type: none"> <li>- Fall 2019: SAIR, and SACSCOC</li> <li>- Spring 2020: SCAIR</li> </ul> </li> </ul> |

# Goals - Looking Back

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|                            | -Spring 2020: other virtual training as everyone was working from home at that time. |
| <b>Resources Utilized</b>  | Time, personnel and budget   |
| <b>Goal Continuation</b>   | Yes, see AY20-21 goal  |
| <b>Goal Upcoming Plans</b> |  |
| <b>Resources Needed</b>    | No new funding needed  |
| <b>Goal Notes</b>          |  |

# Goals - Real Time

Goals for the current Academic Year.

## Goal 1 - Goal 1 for AY20-21: Provide timely and accurate data

|   |  |
|---|--|
| <b>Goal Statement</b>                             | Continue to enhance and add additional means for constituents to access timely and accurate data that supports both internal and external reporting needs. Further, with new senior leadership, seek out new ways to provide actionable and insightful data that will support the University's Strategic Plan and other initiatives.   |
| <b>Linkage to University Goal</b>                 | <ul style="list-style-type: none"> <li>• Provide a sustainable campus infrastructure that supports academic excellence and preeminent student life.</li> </ul>   |
| <b>Alignment with Mission, Vision, and Values</b> | <p>Our mission states that we operate with the following basic principles:</p> <ul style="list-style-type: none"> <li>* Provide institutional data and assessment findings for external reporting;</li> <li>* Provide institutional data and findings from research and assessment to support institutional planning processes</li> </ul>  |
| <b>Status</b>                                     | Progressing as expected (multi-year goal)  |
| <b>Action Plan</b>                                | OIRAA will continue to review and update its website as efforts continue to evolve around best practices for providing data to internal and external constituents. As part of the university's efforts to develop a comprehensive Business Intelligence platform, OIRAA will partner with the Division of IT and other campus stakeholders to promote and augment access for constituents to access timely and accurate data that supports both internal and external reporting and analytic needs. OIRAA staff will work with senior leadership to identify the best ways to provide necessary data, information and analytics.   |
| <b>Achievements</b>                               | <p>As of September 26, 2020:</p> <ul style="list-style-type: none"> <li>* Developed two needed university "taxonomies" to allow for better aggregations of data to support reporting efforts;</li> <li>* Continue to improve on efforts to report data to CHE, IPEDS and documentation to support critical reporting procedures;</li> <li>* Routine reports were posted in a timely manner on the OIRAA website including enrollment and degree data along with the Common Data Set and Accountability Reports for all campuses.</li> <li>* Reformatted student outcomes information on the OIRAA website to support SACSCOC Standard 8.1, "Student Achievement";</li> <li>* Work began to enhance the SACSCOC website to include more annual reporting materials and prepare the site for the final reaffirmation and monitoring reports once completed;</li> <li>* Several staff worked on dashboard related projects during summer 2020 and fall 2020 using Tableau, including: USNWR rankings</li> </ul> |

# Goals - Real Time

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|                            | analysis, enhancements to the Executive Enrollment Dashboard, presentation of NSSE data for CEIL, and analysis of Beyond the Classroom Matters data;   |
| <b>Resources Utilized</b>  | time, personnel and budget   |
| <b>Goal Continuation</b>   | yes  |
| <b>Goal Upcoming Plans</b> | <p>Working with the vendor partner, HelioCampus, OIRAA will help validate data, develop reporting models and promote training and access to this new environment. Additionally, OIRAA will develop new data visualizations as part of the BI rollout, support for new Strategic Plan and USNWR rankings deep dive.</p> <p>Add additional content to the OIRAA website, particularly in the institutional effectiveness area and data dashboards.</p> <p>Continue development for a (near) real-time academic program assessment status tracking.</p> |
| <b>Resources Needed</b>    | Additional personnel   |
| <b>Goal Notes</b>          | * While not directly in the OIRAA "Wheelhouse," several staff partnered with other university staff to develop the COVID-19 dashboard (specific credit and congratulations goes to Mr. Jonathan Poon for his efforts);   |

# Goals - Real Time

## Goal 2 - Goal 2 for AY20-21: OIRAA will support system-wide continuous compliance and accreditation strategies

|   |  |
|---|--|
| <b>Goal Statement</b>                             | USC-Columbia's 10-yr Reaffirmation Report will be due in September 2020. An institution-wide effort is now underway to engage university constituents in efforts related to developing a continuous compliance strategy to support institutional effectiveness and accreditation. Embedded within this goal are numerous IE activities that both affect and support the reaffirmation efforts, including Carolina Core, QEP and Academic Degree Program assessment activities.   |
| <b>Linkage to University Goal</b>                 | <ul style="list-style-type: none"> <li>• Provide a sustainable campus infrastructure that supports academic excellence and preeminent student life.</li> </ul>   |
| <b>Alignment with Mission, Vision, and Values</b> | This directly aligns with the OIRAA mission and values. In addition, the Director of Institutional Effectiveness and Accreditation is the SACSCOC liaison.   |
| <b>Status</b>                                     | Progressing as expected (multi-year goal)  |
| <b>Action Plan</b>                                | <p>Continue to work with the SACSCOC Executive Steering Committee and key university constituents to draft and finalize standards in preparation for the Reaffirmation Report due in September 2020.</p> <p>Continue to evolve and develop new ways to improve assessment reporting, tracking and communication practices.</p> <p>Work with key university personnel to help develop and asses a (new) Quality Enhancement plan.</p>   |
| <b>Achievements</b>                               | <p>As of September 27, 2020</p> <ul style="list-style-type: none"> <li>* Convened regular executive committee meetings to keep senior leadership apprised of activities and developed project dashboard to track timelines. Submitted SACSCOC compliance report on schedule.</li> <li>* SACSCOC Liaison worked closely with external consultant, senior leadership and Board members to document, write and submit the 2020 SACSCOC Monitoring Report.</li> <li>* Fall 2020 developed and launched more robust SACSCOC website that displays official SACSCOC reported materials including the reaffirmation and monitoring reports. Special thanks to Mr. Scott Smith and Ms. Brittany Ashley for their work</li> </ul> <p>Fall 2020, assessment team planned and are launching a series of "listening sessions" in order to improve upon the program assessment practices. This is an exemplar in ensuring that we are continuously seeking ways to improve. Special thanks to Ms. La Trice Ratcliff and Mr. Michael Tucker.</p> |

# Goals - Real Time

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|                            |   |
| <b>Resources Utilized</b>  | time, personnel and budget  |
| <b>Goal Continuation</b>   | yes   |
| <b>Goal Upcoming Plans</b> | <p>Prepare for any necessary follow-up information as part of the Reaffirmation Report along with the (virtual) team visit in Spring 2021.</p> <p>Facilitate and support efforts to implement continuous compliance reviews and certification.</p> <p>Finalize changes to Palmetto College's assessment reporting activities that support Carolina Core and degree program assessment.</p> <p>Partner with Carolina Core leadership and faculty to implement changes to Carolina Core data assessment and reporting processes.</p> <p>Finalize faculty credentials module in preparation for SACSCOC and to ensure sustainability and reliable data are available for schools and colleges.</p> |
| <b>Resources Needed</b>    |   |
| <b>Goal Notes</b>          | <p>It should be noted that OIRAA staff (in particular, SACSCOC liaison Donald Miles, Brittany Ashley and Conni Pedersen) went above and beyond their regular institutional effectiveness duties to ensure that the SACSCOC Compliance Report and Faculty Roster were complete and submitted on time.</p>  |

# Goals - Real Time

## Goal 3 - Goal 3 for AY20-21: Provide constituents access to official university data

|   |  |
|---|--|
| <b>Goal Statement</b>                             | University data must be regarded as a strategic asset using modern business intelligence tools, platforms and analytics capabilities. Continue to enhance and add additional means for constituents to access official university data. This goal will take into consideration such things as “who”, “what”, “where”, “when” and “why” a constituent would be accessing official university data and necessary security measures to protect university data (and personally identifiable information).   |
| <b>Linkage to University Goal</b>                 | <ul style="list-style-type: none"> <li>• Provide a sustainable campus infrastructure that supports academic excellence and preeminent student life.</li> </ul>   |
| <b>Alignment with Mission, Vision, and Values</b> | <p>Our mission states that we operate with the following basic principles:</p> <ul style="list-style-type: none"> <li>* Provide institutional data and assessment findings for external reporting;</li> <li>* Provide institutional data and findings from research and assessment to support institutional planning processes</li> </ul>  |
| <b>Status</b>                                     | Newly Established Goal   |
| <b>Action Plan</b>                                | Further partnerships with colleges, the Division of Information Technology and other service units to establish best practices for accessing official university data. OIRAA will launch data visualizations to support Strategic Planning, Academic Blueprints, Program Review and university rankings which focus on official university data. Work collaboratively with DoIT, HelioCampus and other campus constituents to launch BI initiative and strive to develop additional data insights.   |
| <b>Achievements</b>                               | <p>As of September 26, 2020</p> <ul style="list-style-type: none"> <li>* Members of the OIRAA team spent a significant amount of time during 2020 validating the new data models developed by vendor partner, HelioCampus as part of our business intelligence initiative.</li> <li>* Prepared analysis related to USNWR rankings.</li> <li>* Continued developing plan and infrastructure to track the Strategic Plan metrics and compiling data. Meeting regularly with priority team members.</li> <li>* Completed the transition of metrics for the SC Accountability Report from Focus Carolina to Pathways Plan.</li> <li>* Fall 2020 a new "Student Success" website was created to support SACSCOC Standard 8.1, "Student Achievement."</li> <li>* On target to submit IPEDS fall reports and preparing for Fall 2020 census.</li> </ul> |
| <b>Resources Utilized</b>                         | Personnel time   |
| <b>Goal Continuation</b>                          | Yes, see AY21-22   |
| <b>Goal Upcoming Plans</b>                        | Offer training to campus constituents for new data content and data  |

# Goals - Real Time

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|                         | <p>visualizations. Create a monthly calendar of training events. Work with the Business Intelligence Council and the BI Community of Practice to solicit ideas for new data content and best practices in data sharing.</p> <p>Work with key partners and leadership to develop models and analyses around the USNWR college rankings data. Continue to work with senior leadership to compile and report data to support the new Strategic Plan as well as other ways and means to provide analytics to support the university.</p> |
| <b>Resources Needed</b> | Additional personnel   |
| <b>Goal Notes</b>       |  |



# Goals - Real Time

## Goal 4 - Goal 4 for AY20-21: OIRAA staff support best practices in institutional research and institutional effectiveness

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|--|--|
| <p><b>Goal Statement</b></p>                             | <p>During the coming year the office has committed to engaging in a process to review peer IR/IE websites to identify best practices for displaying institutional data/information and improved means for delivering data (i.e., how are data requests handled, what type of data visualizations are provided, etc.). Also, OIRAA staff are working on a rotation schedule to enhance cross-training and knowledge sharing.</p> <p>Given that COVID has limited travel to conferences, staff are seeking additional ways to engage in professional activities.</p>   |
| <p><b>Linkage to University Goal</b></p>                 | <ul style="list-style-type: none"> <li>• Provide a sustainable campus infrastructure that supports academic excellence and preeminent student life.</li> </ul>   |
| <p><b>Alignment with Mission, Vision, and Values</b></p> | <p>Having staff that function well together in conjunction with staff that have the necessary knowledge, skills and abilities is the only way that the office will be able to achieve its mission and set the office on a course to be a leader in institutional research and assessment.</p>  |
| <p><b>Status</b></p>                                     | <p>Progressing as expected (multi-year goal)</p>   |
| <p><b>Action Plan</b></p>                                | <p>Staff will continue to engage in cross-training activities and participate in team-building activities;<br/>         Staff will attend professional development opportunities (internal and external to USC);<br/>         Monthly rotating professional article review; Monthly rotating IR/IE website review;<br/>         Continue to collaborate with system IR/IE staff to share best practices and foster ideas for data/information sharing.</p>   |
| <p><b>Achievements</b></p>                               | <p>As of September 26, 2020</p> <ul style="list-style-type: none"> <li>* OIRAA staff lead and participate in the Business Intelligence Council and the Academic Community of Practice -- both directly support the university BI initiative.</li> <li>* As the OIRAA contemplates planned or unplanned staff changes, we continue to engage in cross-training activities and rotation of duties on a yearly or bi-yearly cycle. We also promote and support each other on documentation and “proofing” or “testing” assignments or outputs.</li> <li>* Several staff are participating in IPEDS Keyholder training;</li> <li>* OIRAA continued to have weekly virtual “stand-up” meetings throughout the year as well as virtual monthly staff meetings that periodically included guests and staff “work share” presentations.</li> <li>* Virtual conferences attended - SAIR, National Symposium on Student Retention, Tableau.</li> </ul> |

# Goals - Real Time

|                            |   |
|----------------------------|---|
|                            | * Other professional development activities: UofSC HR training, online Tableau/other data visualization training; |
| <b>Resources Utilized</b>  | Personnel and time  |
| <b>Goal Continuation</b>   | Yes, see AY21-22  |
| <b>Goal Upcoming Plans</b> | Engage more staff in new BI initiative  |
| <b>Resources Needed</b>    |   |
| <b>Goal Notes</b>          |   |

# Goals - Looking Ahead

Goals for the next Academic Year.

## Goal 1 - Goal 1 for AY21-22: Provide timely and accurate data

|   |   |
|---|---|
| <b>Goal Statement</b>                             | Continue to enhance and add additional means for constituents to access timely and accurate data that supports both internal and external reporting needs. Seek out new and improved ways to compile and report "actionable" data.  |
| <b>Linkage to University Goal</b>                 | <ul style="list-style-type: none"> <li>• Provide a sustainable campus infrastructure that supports academic excellence and preeminent student life.</li> </ul>  |
| <b>Alignment with Mission, Vision, and Values</b> | <p>Our mission states that we operate with the following basic principles:</p> <ul style="list-style-type: none"> <li>* Provide institutional data and assessment findings for external reporting;</li> <li>* Provide institutional data and findings from research and assessment to support institutional planning processes</li> </ul>   |
| <b>Status</b>                                     | Newly Established Goal  |
| <b>Action Plan</b>                                | OIRAA will continue to review and update its website as efforts continue to evolve around best practices for providing data to internal and external constituents. As part of the university's efforts to develop a comprehensive Business Intelligence platform, OIRAA will partner with the Division of IT and other campus stakeholders to promote and augment access for constituents to access timely and accurate data that supports both internal and external reporting and analytic needs. With new senior leadership, OIRAA staff will work collaboratively with campus partners to support the University's Strategic Plan and other university initiatives. |
| <b>Achievements</b>                               | will be reported in Fall 2021.  |
| <b>Resources Utilized</b>                         | time, personnel and budget  |
| <b>Goal Continuation</b>                          |   |
| <b>Goal Upcoming Plans</b>                        |   |
| <b>Resources Needed</b>                           | Additional personnel  |
| <b>Goal Notes</b>                                 | Throughout 2020 it has become more critical that OIRAA lead, partner and deliver (new) data, insights and guidance on a multitude of topics that fall under the umbrella of "institutional effectiveness." The office has received numerous accolades that speak to our "small but mighty" team. However, given the on-going and new demands, additional still are needed to continue to support the university in the strong and dedicated manner that we have been providing.   |

# Goals - Looking Ahead

## Goal 2 - Goal 2 for AY21-22: OIRAA will support system-wide continuous compliance and accreditation strategies

|   |  |
|---|--|
| <b>Goal Statement</b>                             | <p>OIRAA (specifically, institutional effectiveness staff) will engage university constituents in efforts related to developing a continuous compliance strategy to support institutional effectiveness and accreditation. It is critical that an institution this size regularly review all standards on an annual basis in order to achieve a high degree of confidence in meeting all standards.</p> <p>Embedded within this goal are numerous IE activities that support the university, including Strategic Planning, Carolina Core, QEP and Academic Degree Program assessment activities.</p>   |
| <b>Linkage to University Goal</b>                 | <ul style="list-style-type: none"> <li>• Provide a sustainable campus infrastructure that supports academic excellence and preeminent student life.</li> </ul>   |
| <b>Alignment with Mission, Vision, and Values</b> | <p>This directly aligns with the OIRAA mission and values. In addition, the Director of Institutional Effectiveness and Accreditation is the SACSCOC liaison.</p>  |
| <b>Status</b>                                     | Newly Established Goal   |
| <b>Action Plan</b>                                | <p>After the University receives the SACSCOC focus report items in November 2020, the University will implement the SACSCOC continuous compliance schedule. OIRAA will work with the Provost Office on developing committees that will review and update each SACSCOC standard on an on-going yearly basis.</p> <p>Continue to evolve and develop new ways to improve assessment reporting, tracking and communication practices.</p> <p>Work with key university personnel to help develop and assess a (new) Quality Enhancement plan.</p> <p>Refocus efforts to optimize best, most practical means for reporting faculty roster (compliance) data.</p> <p>Work with Provost Office and key university personnel to help develop new/modified ways to assess Carolina Core.</p> |
| <b>Achievements</b>                               | Will be reported in Fall 2021  |
| <b>Resources Utilized</b>                         | time, personnel and budget   |
| <b>Goal Continuation</b>                          | yes  |
| <b>Goal Upcoming Plans</b>                        |  |
| <b>Resources Needed</b>                           | Additional funding for part-time (student) assistance.   |
| <b>Goal Notes</b>                                 |  |

# Goals - Looking Ahead

## Goal 3 - Goal 3 for AY21-22: Provide constituents access to official university data

|   |  |
|---|--|
| <b>Goal Statement</b>                             | University data must be regarded as a strategic asset using modern business intelligence tools, platforms and analytics capabilities. Continue to enhance and add additional means for constituents to access official university data. This goal will take into consideration such things as “who”, “what”, “where”, “when” and “why” a constituent would be accessing official university data and necessary security measures to protect university data (and personally identifiable information). |
| <b>Linkage to University Goal</b>                 | <ul style="list-style-type: none"> <li>• Provide a sustainable campus infrastructure that supports academic excellence and preeminent student life.</li> </ul>   |
| <b>Alignment with Mission, Vision, and Values</b> | <p>Our mission states that we operate with the following basic principles:</p> <ul style="list-style-type: none"> <li>* Provide institutional data and assessment findings for external reporting;</li> <li>* Provide institutional data and findings from research and assessment to support institutional planning processes</li> </ul>  |
| <b>Status</b>                                     | Newly Established Goal   |
| <b>Action Plan</b>                                | Further partnerships with colleges, the Division of Information Technology and other service units to establish best practices for accessing and reporting official university data. OIRAA will launch data visualizations to support Academic Blueprints, Program Review, rankings data, strategic planning data, etc. Work collaboratively with DoIT, HelioCampus and other campus constituents to launch and further enhance BI initiative.   |
| <b>Achievements</b>                               | will report in Fall 2021   |
| <b>Resources Utilized</b>                         | Time and personnel   |
| <b>Goal Continuation</b>                          |  |
| <b>Goal Upcoming Plans</b>                        |  |
| <b>Resources Needed</b>                           | Additional personnel.  |
| <b>Goal Notes</b>                                 |  |

# Goals - Looking Ahead

## Goal 4 - Goal 4 for AY21-22: OIRAA staff support best practices in institutional research and institutional effectiveness

|   |   |
|---|---|
| <b>Goal Statement</b>                             | During the coming year the office has committed to engaging in a process to review peer IR/IE websites to identify best practices for displaying institutional data/information and improved means for delivering data (i.e., how are data requests handled, what type of data visualizations are provided, etc.). Further, we have committed to a process of sharing current higher education happenings in the form of a shared reading folder and monthly article reviews during staff meetings to help each other stay abreast of higher ed policies and initiatives. With the increased budget received last year, we will continue to support pertinent and relevant professional development activities. |
| <b>Linkage to University Goal</b>                 | <ul style="list-style-type: none"> <li>• Provide a sustainable campus infrastructure that supports academic excellence and preeminent student life.</li> </ul>  |
| <b>Alignment with Mission, Vision, and Values</b> | Having staff that function well together in conjunction with staff that have the necessary knowledge, skills and abilities is the only way that the office will be able to achieve its mission and set the office on a course to be a leader in institutional research and assessment.  |
| <b>Status</b>                                     | Newly Established Goal  |
| <b>Action Plan</b>                                | <p>Staff will continue to engage in cross-training activities and participate in team-building activities;</p> <p>Staff will attend professional development opportunities (internal and external to USC);</p> <p>Dedicated "work share" time to highlight and inform each other of university work;</p> <p>Continue to collaborate with system IR/IE staff to share best practices and foster ideas for data/information sharing.</p>  |
| <b>Achievements</b>                               | will be reporting in Fall 2021  |
| <b>Resources Utilized</b>                         |   |
| <b>Goal Continuation</b>                          |   |
| <b>Goal Upcoming Plans</b>                        |   |
| <b>Resources Needed</b>                           |   |
| <b>Goal Notes</b>                                 |   |

# Programs or Initiatives

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## Effective Programs or Initiatives

*List your most effective programs/initiatives toward fulfillment of mission.*

## Program Launches

*List any programs/initiatives that were newly launched during the Academic Year or any programs/initiatives you would like to launch in the coming year(s). Describe the program/initiatives, provide financial requirements (including additional staff), and academic year in which you would launch. What key performance indicators are you utilizing to track the success of this program?*

During Fall 2020 and Spring 2021 will be working with Carolina Core leadership to revise a new method for assessment. Additional assessment support will be provided to help assess the QEP. Both these activities have linkages to SACSCOC and require time and resources to ensure we are assessing our general education and quality enhancement plan efforts.

Significant efforts related to the university's BI initiative will take place during 2021 and will involve many OIRAA staff.

## Program Terminations

*List any programs that were newly terminated or discontinued during the Academic Year. Provide justification as to why the program was discontinued.*

## Program Rankings

*List any nationally ranked or external recognition during the Academic Year. For each, provide the formal name of the program followed by the name of the organization that issued the ranking, the date of notification, effective date range, and any other relevant information.*

## Supplemental Info - Programs or Initiatives

*Any additional information on Programs or Initiatives appears as 'Appendix 1. Programs or Initiatives' (bottom).*

# Initiatives and Fees

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## Initiatives

*Describe any new initiatives your unit will need for the coming year.*

Since there was no new money provided for FY20-21, OIRAA would like to again request funding to replace its current homegrown and very difficult to use assessment tool, Assessment Plan Composer (APC). During 2020 staff began the process to evaluate possible replacement options for the current assessment tool. The current software was developed in house and it is extremely inefficient given the extensive volume of academic degree programs that are assessed. There is no efficient means to track progress nor is there any internal communication features within APC. Further, as efforts to assess the Carolina Core evolve (as well as a new QEP), a suitable assessment tool must be acquired.

We would like to request \$150,000 as initial implementation funding to be able to put together a Request for Proposals from possible vendors by the end of Fall 2020. There will be on-going maintenance costs which may require additional funding beyond what was previously paid for Blackboard Outcomes. Without having a secure funding source we will not be able to develop the Request for Proposals.

## Fees

*List any new or changed fees that your unit has implemented or had to take on in the last academic year.*



# Community Engagement

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## Community Perceptions

*Describe how your unit assesses community perceptions of your engagement, and how the unit assesses the impact of community engagement on students, faculty, community and the institution. Provide specific findings.*

# Collaborations

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## Internal Collaborations

*List your Unit's most significant internal collaborations and multidisciplinary efforts that are internal to the University. Details should be omitted; list by name only.*

OIRAA staff are members of the following groups:

- IE Executive Leadership Committee (SACSCOC liaison leads)
- Academic Program Liaisons (2-3 staff are Ex. Officio members)
- Carolina Core (2-3 staff are Ex. Officio)
- Assessment Advisory Council (co-lead and 2-3 staff participate)
- Banner Student Systems Council (member)
- College of Education's "Quality Assurance Committee" (1 staff Ex. Officio)
- Business Intelligence Council (1 staff member, chaired in AY19-20)
- Analytics Community of Practice (1 staff member co-leads, most staff are involved)

OIRAA staff are heavily involved in helping to develop the reporting infrastructure that will track and report progress on the university's Strategic Plan.

## External Collaborations

*List your Unit's most significant external collaborations and multidisciplinary efforts that are external to the University. Details should be omitted; list by name only.*

Implementation partners with members of DoIT and HelioCampus for the university's BI initiative.

# Campus Climate and Inclusion

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## Campus Climate and Inclusion

*Activities the unit conducted that were designed to improve Campus, Climate, and Inclusion.*

In prior years, OIRAA has been a key partner in helping the Office of Diversity and Inclusion to administer, collect and analyze Campus Climate Survey data. During the AY19-20 staff were part of a small working group to initiate and launch a presidential "Campus Climate" survey using a third party vendor, Modern Think. There may be a future demand on staff to continue to analyze results and possibility work with Modern Think to present the results utilizing Tableau. Further, with the University's first new Vice President of Diversity, Equity and Inclusion there will be opportunities to collaborate, particularly to support Strategic Priority #4, "Cultivate a more diverse, equitable and inclusive campus culture where every individual, regardless of background, has the full opportunity to flourish and thrive."

# Concluding Remarks

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## Weaknesses and Plans for Improvement

*What is your unit struggling with? What plans do you have to overcome the weakness that you have faced in the next academic year.*

## Key Issues

*Identify key issues or potential challenges your unit will encounter this coming year and the steps you plan on initiating.*

Faculty Credential (Campus Labs) ran into some issues at the eleventh hour in the development of our faculty roster that was needed for the SACSCOC compliance report. OIRAA staff developed a work around, but we need to pursue a long term solution that will help position the University for continuous compliance. Not only has the office had challenges with the tools itself, but the volume of courses and faculty has made the editing process more of a challenge than we anticipated.

Under-performing (home grown) assessment report tool needs to be replaced with something more robust, easy to use and efficient.

New demands on the time and talents of staff in terms of assessment needs, data analysis, analytics and data visualizations. Throughout 2020 it has become more critical that OIRAA lead, partner and deliver (new) data, insights and guidance on a multitude of topics that fall under the umbrella of "institutional effectiveness." The office has received numerous accolades that speak to our "small but mighty" team. However, given the on-going and new demands, additional staff are needed to continue to support the university in the strong and dedicated manner that we have been providing. See new funding request in New Initiatives section

## Quantitative Outcomes

*Explain any surprises regarding data provided in the quantitative outcomes modules throughout this report.*

Best guestimate, several thousand pages of materials assembled EACH for the SACSCOC Reaffirmation Report and Monitoring Report. Both submitted on schedule in September 2020.

In any given academic year:

CHE data developed, edited and reported: 14

IPEDS surveys directly compiled by OIRAA staff: 80 (we report for all system campuses)

Additional IPEDS surveys coordinated by OIRAA staff: 16

Data requests: over 100

Reputational and consortium survey/requests: approximately 2 dozen

## Cool Stuff

*Describe innovations, happy accidents, good news, etc. that occurred within your unit not noted elsewhere in your reporting.*

It can not be over-stated how impressive the work was that Mr. Donald Miles did to prepare and submit the university's 10-year Reaffirmation Report. Three additional staff members contributed significantly to support the SACSCOC efforts this past year, Ms. Brittany Ashley,

# Concluding Remarks

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Ms. Conni Pedersen and Mr. Scott Smith. Through their tireless efforts, all compliance reports were submitted on time. In addition, Mr. Miles also dedicated a significant amount of time and energy to helping the university research and report its SACSCOC Monitoring Report in Fall 2020.

COVID-19 certainly changed the plans for most of the university and OIRAA was no exception. However, this afforded us several unique opportunities to assist the campus community by providing an Executive Enrollment Dashboard with content never before provided on a \*daily\* basis. In prior years, a very limited weekly enrollment report was provided. Further, as staff and students were returning to campus it was recognized that the university needed a high-level, COVID-19 reporting dashboard. Mr. Jonathan Poon, utilizing Tableau, helped to create a well-received strategic and timely dashboard to support COVID test/case reporting efforts.

## Appendix 1. Programs or Initiatives

## OIRAA AY21-22 Budget Request to Support Strategic Planning and Institutional Effectiveness Initiatives

### **TOTAL request: \$425,000**

New demands on the time and talents of staff in terms of assessment needs, data analysis, analytics and data visualizations. Throughout 2020 it has become more critical that OIRAA lead, partner and deliver (new) data, insights and guidance on a multitude of topics that fall under the umbrella of "institutional effectiveness." The office has received numerous accolades that speak to our "small but mighty" team. However, given the on-going and new demands (specifically supporting the Strategic Plan), additional staff are needed to continue to support the university in the strong and dedicated manner that we have been providing.

1. \$250,000 to hire two new full-time staff to support areas noted below and to augment salary for key BI/data analytics staff.
  - a. Compiling data and on-going support and reporting needs to properly assess the success of the university's new Strategic Plan.
  - b. Enhancing OIRAA's lead role in helping the university implement its strategic Business Intelligence platform with external partner, HelioCampus. AY20-21 is the first year of a multi-year engagement to implement a tool, infrastructure and governance that can properly help the university to utilize its data resources to help guide strategic decision-making.
  - c. Supporting myriad assessment needs
2. \$150,000 as initial implementation funding to be able to put together a Request for Proposals from possible vendors by the end of Fall 2020. There will be on-going maintenance costs which may require additional funding beyond what was previously paid for Blackboard Outcomes. Without having a secure funding source we will not be able to develop the Request for Proposals.
3. Funding to support student(s): \$25,000

Beyond helping students improve "real world" computer skills, the OIRAA offers myriad opportunities for students to engage in critical business/industry areas related to: assessment, data analytics, business intelligence and project management