

**2023-2024**  
**Unit Annual Report**  
**Division of Academic Affairs**  
**Unit: Institutional Research & Planning**

**I Mission and Goal/Outcomes Statement:**

The mission of the Office of Institutional Research and Planning (OIRP) is to provide accurate and meaningful information and analysis to University decision makers, the broader university community, and external stakeholders in order to advance the University's mission. OIRP is a partner in the University's success by leveraging existing data in an insightful and useful manner. OIRP supports planning, management, accreditation, and assessment activities at every level of the University.

**II Personnel:**

*List all staff and note all personnel changes that occurred during 23-24.*

<u>Name</u>	<u>Position</u>
Becca Colby	Assoc. Director of Institutional Research (New)
Rajeev Indira-Nagaraju	Director of Institutional Research
Cate Kaluzny	Director of Assessment
Pamela McCafferty	Assoc. VP for Institutional Research & Planning
Susan Piro	Administrative Assistant II

**III Facilities/Equipment:**

*List any new facilities/equipment/software etc. acquired during 23-24.*

**IV Budget Expenditure Analysis:**

*Was the budget expended as planned? Were additions/changes made, and if so, explain.*

The budget was fully expended and required additional funding from the Provost to cover a cost increase in the RNL CSI and MYSA surveys. Travel funds were used to cover the implementation cost of Watermark Planning & Self-Study as well as a faculty member's attendance at the AAC&U Gen Education Pedagogy and Assessment conference. As a result, very little funds were available for staff professional development.

**V Programs/Activities:**

*List major campus activities, events etc. that the office participated in/supported; committees served; community outreach; etc. List events provided to current and prospective students. Also, provide professional development of all staff.*

#### University Committees:

- R. Colby: Identity-based Data Collection and Use Committee
- R. Indira-Nagaraju: JED Committee
- C. Kaluzny: UARC, General Education Program Area Committee, Financial Sustainability Taskforce/Administrative Efficiencies group
- P. McCafferty: Mission Review Committee (chair), UARC (chair), AUC Policy (secretary), Leading for Change (chair), Identity-based Data Collection and Use Committee (chair), Financial Sustainability Taskforce/Student Services group (executive sponsor)

#### DHE Committees/Activities:

- R. Colby: DHE/EOE Foundations of Equity series participant (levels 1 & 2)
- R. Indira-Nagaraju: DHE/EOE Foundations of Equity series participant (levels 1 & 2)
- C. Kaluzny: AMCOA, DHE/EOE Foundations of Equity series participant (levels 1 & 2)
- P. McCafferty: AMCOA, DHE Data Council, DHE Data Council/Social and Economic Mobility Subcommittee, EOE Data Equity Framework participant (level 3)

#### Core Functions:

- Continued to support and grow a culture of assessment and data-informed decision making on campus.
- Provided data support to Student Affairs, Finance & Administration, Grant Center, Graduate & Continuing Education, Advancement, Marketing, deans, department chairs and all academic departments undergoing program review/reaccreditation visits. Responded to all ad hoc requests for data.
- Maintained university compliance with all external data requests, such as HEIRS, IPEDS, NECHE, NEBHE, NCAA, SAM, U.S. News & World Report, Petersons, College Board, GRE, CGS, GSS-NSF-NIH and Military Friendly Survey.
- Developed, administered, analyzed and provided support for campus surveys, including the Exit Survey for Graduate Students, First Destination Survey for Undergraduate Students, 1, 3, and 5-year Alumni Surveys, Student Athlete survey, Campus Dining survey, First Year Academic Writing survey and the Advising (Appendix H) survey. Continued to analyze and share Climate Survey results with campus community.
- Supported program review and external accreditation; led UARC and peer review of annual assessment reports; led the AAC&U Davis Grant for the Assessment of Integrative Learning; held weekly assessment office hours in the CTL; produced an [\*Annual Report of Assessment Activities\*](#); developed additional materials to support assessment work including robust web content.
- Administered RNL CSI and MYSA questionnaires
- Produced and published the University Factbook
- Produced and distributed the 10-year Departmental Trend Data
- Produced the Undergraduate Catalog
- Tracked the status of the University Strategic Plan via both metrics and tactics

- Served as NECHE accreditation liaison; submitted NECHE Annual Report; tracked the progress of our NECHE self-study projections.
- Provided university-wide support and training for Qualtrics survey software
- Provided university-wide support and training for Watermark Planning & Self-Study assessment software
- Continued to support Finance and Administration with enrollment projections
- Developed a new Student Success Data webpage
- Hired and onboarded the new Associate Director of Institutional Research

**Professional Development:**

Professional development was limited to no-cost and low-cost local and online opportunities due to limited resources. Continued to fund faculty professional development in assessment.

**VI Action Plan for 2023-24:**

*(See VII below)*

**VII Assessment Report for 2023-24**

*Were the Action Plan objectives met? Provide in list or table format that parallels item VI above.*

<b>Planned Initiatives for 2023-24</b>	<b>Associated Strategic Plan Goal &amp; Strategy</b>	<b>Status</b>
Implementation of Watermark Planning & Self Study Assessment software	NECHE Standard 2	Completed
Tracking and Publication of Strategic Plan Metrics (ongoing)	NECHE Standard 2	Completed
Tracking and Publication of NECHE Self-Study Projections (ongoing)	NECHE Standard 2	Completed
Lead the review of the University’s Mission, Vision and Core Values	NECHE Standard 1 (Projection)	Completed (see below)
Develop and implement Data Governance Policy and Practices	NECHE Standards 2 & 8	Not Completed
Complete the Edify Dashboard Implementation	NECHE Standards 2 & 8	Completed
Support the development and implementation of a General Education Assessment Plan (ongoing)	NECHE Standards 4 & 8	Completed

Continue the implementation of Qualtrics; Review university survey protocols	NECHE Standard 8	Completed
Review Graduate Exit Survey; Partner with SGOCE Dean to lead the review of ILPs in relation to SGOCE	NECHE Standard 8	Completed
Establish working group to identify strategies to improve response rates for exit and alumni surveys	NECHE Standard 8 (Projection)	Not Completed
Publish additional 2022 Climate Survey data	NECHE Standards 5, 8 & 9; Strategic Plan Goals 2 & 4	Completed

### **VIII Other Accomplishments:**

*List accomplishments not already captured above.*

Served as the NECHE Accreditation Liaison Officer (ALO) and was responsible for the NECHE Annual Report. Continued to track and publish the status of our NECHE projections, something not previously done at the University.

Tracked and published the status of our 2020-2025 Strategic Plan, something not previously done at the University. Progress is measured in a table of metrics as well as in a summary narrative document focused on tactical accomplishments.

Led the review of the University mission, vision and core values. Due to the announcement of the president's retirement, the scope was limited to foundational work and paused in advance of the next president's arrival.

Implemented Watermark Planning and Self-Study assessment software and supported its adoption through training and outreach. Twelve academic departments attended presentations or trainings. Thirteen programs successfully piloted the use the software for annual reporting.

Completed the Edify dashboards. Maintained and updated the Rapid Insights Bridge dashboards.

Supported the second annual General Education Assessment Day which is a newly resurrected activity for our campus.

Led the AAC&U Davis Grant for the Assessment of Integrative Learning.

Developed the new Student Success Data webpage designed to provide insights into our institutional effectiveness related to student outcomes. Data includes retention, persistence and graduation rates as well as NSSE, CSI and MYSA data.

Continued to implement and support the campus in the use of Qualtrics.

Provided extensive data and analysis to support the TRIO SSS and TRIO SSS STEM grant applications.

Led the initial planning for the new federal Gainful Employment/Financial Value Transparency (GE/FVT) reporting requirements which will open in July and be due in October of 2024.

Participated in the DHE/EOE Data Equity Framework training.

Hired and onboarded the new Associate Director of Institutional Research, a position focused on leveraging data to assess and inform student success initiatives.

Led the founding of the MA State Universities Institutional Research (MASUIR) group which provides resources and meetings for IR professionals in the MA state university system.

**IX Action Plan 2024-2025:**

Planned Initiatives for 2024-25	Associated Strategic Plan Goal & Strategy	Indicate if a DEI initiative
Continue the rollout/adoption of Watermark Planning & Self Study assessment software	NECHE Standard 2	
Track and publish Strategic Plan Metrics and Summary Report	NECHE Standard 2	
Track and Publish NECHE Self-Study Projections	NECHE Standard 2	
Lead the review, assessment, reprioritization, updating and extension of the 2020-2025 Strategic Plan	NECHE Standard 1	
Develop and implement data governance policies and practices	NECHE Standards 2 & 8	
Implement Tableau data visualization software	NECHE Standards 2 & 8	
Support the continued development and implementation of a General Education Assessment Plan	NECHE Standards 4 & 8	
Complete the update of the ILPs in relation to SGOCE	NECHE Standard 8	
Establish working group to identify strategies to improve response rates for exit and alumni surveys	NECHE Standard 8 (Projection)	

Identify and administer a new campus climate survey instrument	NECHE Standards 5, 8 & 9; Strategic Plan Goals 2 & 4	X
Implement the Postsecondary Data Partnership (PDP)	NECHE Standard 2 & 8	
Partner with the Director of Communications and CIO to create a centralized policy repository and to develop a university policy governing policy creation and maintenance	NECHE Standard 9 (Projection)	
Lead the federal GE/FVT reporting	Federal mandate	
Research options for a replacement for CARS (planning software)	NECHE standard 2	
Expand the content of and drive utilization of the new student success data webpage	NECHE standards 2 & 8	

*Updates to the Action Plan may be submitted via a revised Annual Report.*

**X Reflection:**

*Take this section to reflect on--*

- 1) *Initiatives that you may be considering for 24-25 academic year that you did not already capture above.*
  
- 2.) *Anything else not captured in this report that you would like to share.*