

Nov 13, 2024 | 📅 2024 NEAIR Conference Panel Session

Attendees: Denise Nadasen James Redwine Karen Marie Egypt Karen S Vance

Updating notes as we go. Evolving careers in IR.

See word cloud/graphic on all areas of IR at the end of these notes.

We will use Mentimeter to ask the audience questions and share their responses live.

EACH PERSON HAS 2 MINUTES TO ANSWER EACH QUESTION.

A SLIDE WITH OUR PICTURES AND NAMES AT THE BEGINNING

BEGIN AT 10:15 - Welcome the audience and say we will be answering a series of questions, but also asking the audience to answer some questions using Mentimeter, so get your phones ready! We will begin with Question 1 and let the panelists introduce themselves:

1. **How has your role within IR evolved since the time you started in the profession? (all panelists)(2.5 minutes each) - 10 MINUTES TOTAL**

- a. Denise: 1) BOR. GA. Big issues and big politics. 2) Flagship. Comprehensive portfolio. Large office. Reputation matters. Slow to change, but change is sustainable. Created tools for accountability - faculty workload, faculty salaries, and outcomes dashboards. Solid tools to build on for future research and success. 3) Online university. EM and student success. Competitive environment. Research and predictive analytics. Constant changes. Lots of reorganizations. Assessment office was separated, then merged with IR, and then separated and some work was outsourced to for-profit vendors. Quick to make change, but the sustainability of change is precarious. 4) Association. Broader issues from a national perspective. PxP. Identify barriers to student success. Data was valued. What worked? Communities of practice. Greater collaboration. Important to have a diverse set of viewpoints.
- b. Jamie: I got started in IR 20 years ago when I was working as an academic librarian. It was hard to explain exactly what I did for a living. Now I say 'data analytics' and people know what I'm talking about. I have an investment background, so around my financial friends, I describe my job as 'higher ed industry analyst' - definitely when I have my accreditation hat on. At my first two institutions, IR played a lead role in accreditation. I worked with faculty to document student learning outcomes. Rankings and ratings, I think, are driving the game more than ever. I spend the majority of my time at LUM responding to all the various surveys/questionnaires. The IPEDS/state reporting burden has not gotten any smaller and now we have the data visualization software that can really make our fact books pop. Now our work can be informative and sexy.
- c. Karen V: My personal journey evolved from roles which required me to be a social scientist foremost with a few technical skills (e.g., SPSS and Access) to roles that embodied not only the social science skillset but a broader range of technical skills (e.g., SQL, PowerBI, Oracle, and other cloud-based products). What this meant for me was the need to embrace continuous learning of new tools as they became available. Early in my career, I was responsible for much of the work associated with accreditation, which involved collecting and summarizing data, producing a few tables and graphs, static factbooks, and writing lengthy narratives to show evidence of impact and continuous improvement. With the proliferation of data as described according to the 5 Vs - velocity, volume, veracity, variety, and value - the narratives became shorter while the expectation for meeting data users' needs grew exponentially. As the technology changed, so did my role within IR.
- d. Karen E: My path into Institutional Research took an unexpected turn—while earning my bachelor's and master's degrees in piano performance, I worked in IT as a helpdesk consultant and COBOL programmer. That's how I first connected with the IR office, and, before long, I was encouraged to apply for a research analyst role. I officially joined IR in 1999 —though I still can't fully explain what I do to my family! Most of them think I'm either a teacher or some type of administrator. Decades ago, there certainly weren't any booths at job fairs for institutional researchers.

In my early IR roles, my work was split among performing in-depth research, assessment, and policy analysis in addition to handling reporting and ad hoc data requests. Over time, though, my role shifted to more frequent reporting, dashboarding and quick-turnaround data analysis as mandated reporting and dashboarding demands increased. The growing requirements for state, federal, and accreditation reporting have certainly reshaped our responsibilities in IR.

Job opportunities for institutional researchers were also quite limited back in my early years compared to today; In my early years, most roles within higher edu for IR professionals were often limited to the IR office or wherever the IR function was housed. Today, as data analysis skills are in more demand across campus, we're seeing new possibilities outside traditional IR settings. At my institution, for example, I now work within Enrollment Management in a separate relatively new office from IR. Recently, one of my analysts transferred to yet another relatively new office to perform similar work, underscoring the evolution of new possibilities across different areas of higher ed.

SHOW WORDCLOUD TO DISPLAY ALL THE VARIOUS AREAS OF AN IR ROLE. (1 minute)

FIRST MENTIMETER QUESTION: (2 minutes)

TIME CHECK: 10:30

2. What defines an IR professional in this new era of rapid change? (2+ panelists: Karen E, Karen V)

- a. Karen V: In addition to the standard skills one would see in a job posting for an IR position (e.g., skills such as Power BI or Tableau, Excel, SQL, ERP specific knowledge (Banner or Workday)), there are a few additional skills that define an IR professional. From a very practical perspective, IR professionals have an unwritten expectation to have project management skills on top of technical skills. By this, I mean that effective IR professionals develop the skills to identify key stakeholders for a project (regardless of project size), determine the scope of a project (or data request), solidify the questions being asked, align the data with the question, identify data sources, source the data, and present the data in an easily consumable way that aligns with the question being asked. The last piece is essential and relies on data sense-making. Being a strong listener, communicator, collaborator, organizer, and adept in the technical aspects of the field are all keys to success in this era of rapid change. In addition to these skills and competencies, today's IR professionals must be comfortable with change and open to suggesting new ways of doing things, even though those suggestions might be shot down now and then. That's okay!
- b. Karen E: An IR professional in this new era of rapid change could be defined by the ability to balance the foundational research aspects of the field with the growing demands of compliance and reporting. In the past, IR was more research-oriented with expectations to conduct in-depth studies, prepare policy briefs, and provide strategic insights.

However, with the expansion of mandated reporting from federal, state, and accreditation bodies, much of our role has shifted. Today, we are responsible for ensuring our institutions meet these external requirements, which has changed the public perception of IR. Instead of being seen as researchers who also manage institutional reporting, we are now often viewed as the custodians of data compliance and institutional accountability.

Despite this shift, the role of the IR professional should remain deeply strategic. We must still possess strong research skills, but now we need to balance those with expertise in data management, regulatory compliance, and the ability to synthesize complex data into clear, actionable insights. Additionally, we are increasingly asked to work cross-functionally, integrating our work with institutional planning, enrollment management, and student success initiatives.

An IR professional is not just a researcher or a data manager but a versatile, strategic partner who helps institutions navigate both compliance and long-term goals, using data to drive institutional effectiveness and student success.

TIME CHECK: 10:35

3. What are the pressing challenges facing IR, and how can we stay ahead? (2+ panelists: Denise, Karen E)

- a. Karen E: One of the most pressing challenges facing Institutional Research (IR) today is the overwhelming demand for timely and accurate data in an environment where resources are often stretched thin. The growth in mandated reporting requirements, coupled with increased expectations for data-driven decision-making, means that IR offices are under constant pressure to deliver high-quality information quickly. This can create a reactive rather than proactive culture within IR, where we are focused more on meeting immediate needs than on long-term strategic goals.

Another challenge is the rapid advancement of technology and data tools. While these offer incredible opportunities for IR to enhance analysis and reporting, staying ahead requires ongoing professional development and learning. IR professionals need to continually adapt to new systems, data visualization techniques, and advanced analytics methods like machine learning or predictive modeling. The shift towards data science is an exciting evolution, but it also means we need to develop new skillsets to stay relevant. In addition to the traditional skillsets, IR professionals must now also embrace artificial intelligence (AI) and machine learning to stay ahead of evolving challenges in higher education. AI is rapidly transforming how we process, analyze, and interpret data, offering new ways to uncover patterns and predict outcomes. By integrating AI into our toolkit, IR professionals can move beyond basic descriptive statistics and delve into more sophisticated, predictive, and prescriptive analytics.

Data governance and data integrity are also increasingly important. With more departments across institutions handling data, ensuring consistency, accuracy, and proper usage is a growing concern. IR professionals must lead efforts in setting data standards and promoting data literacy across campus.

To stay ahead of these challenges, we need to prioritize collaboration, both within our institutions and through professional networks. Working closely with IT, enrollment management, and other units across our campuses, allow us to ensure the data we provide is both accurate and useful. Additionally, continuous professional development—whether through learning new data tools, attending conferences, or engaging with peer networks—helps us stay on top of emerging trends and technologies. Project management skills are another area of growing importance. With IR offices often juggling multiple projects at once—from compliance reporting to strategic research initiatives—being able to manage timelines, resources, and stakeholders efficiently is key to delivering quality work in a timely manner. Familiarity with project management methodologies, like Agile or Scrum, can help streamline workflows and keep teams organized.

- b. Denise: [Karen E has identified the main issues ... increase in workload and potential decrease in staffing... follow up to that ...] How do we demonstrate that IR is relevant and valuable to senior leaders who are also overwhelmed and potentially understaffed? Utilizing the tools and technology, we can automate as much as possible. We can and should create a community around the effective use of data. We can lead the effort to deliver data to constituents so they have access to what they need. We can educate constituents on how to use/analyze/apply data. By creating a component of our work that champions data literacy, we demonstrate that we have relevant and important data, we understand the issues and the needs, we know how to use and apply the data, and we are willing to teach others how to use it. The most important thing, in my view, is that we continue to send the message that we get it, and we can help. If we focus only on compliance reporting, we no longer need a seat at the table. But IR has so much more to offer and we are in a time when presidents and senior leaders want and need our help ... but may not be willing to provide additional resources ... YET. They need data to be more strategic in their decision-making. We are in a good position to respond positively with the data they need. Once we do, then we can justify additional resources. But be clear on the resources needed to do the work.

AIR SURVEY SUMMARY SLIDE (1 MINUTE)

Top priorities for new IR professionals

1. Context
 - a. Develop contextual intelligence by integrating knowledge of the institution with the broader higher education, national, and international contexts.
2. Research Competencies
 - a. Research methodology- quantitative and qualitative analysis
 - b. Software and tools
 - c. Discern relevant data for each specific context
 - d. See important patterns in the data
3. AI
 - a. AI can support the automated analysis of vast amounts of data, but it cannot replace the interpretive skills of a seasoned IR professional
4. Security, Privacy, and Ethics
 - a. Trust in the data by approaching analysis with an ethical conduct
 - b. Protect individual privacy
5. Soft skills
 - a. Communication
 - b. Critical thinking

- c. Teamwork
- d. Understand the intended purposes
- e. Create collaborations

Reference: Nina Gogadze, Mattia Quinteri, Hesam Sadeghian Rios, and Heisler Sosa. Published by the Association for Institutional Research. June 13, 2024.

TIME CHECK: 10:41

4. How can we cultivate a culture of continuous improvement and adaptability within IR? (2+ panelists: Denise, Karen V)

- a. Denise: The work of Powered by Publics was designed to create continuous improvement practices on campus to help improve student outcomes for all students, particularly for marginalized populations. We brought together 125 institutions and created 14 communities of practice which were made up of several stakeholders from campus - all engaged in some way with student success - across several different institutions. These folks worked together to identify the common problems around student success and explore the underlying causes. A critical piece of the improvement model or transformation was to get buy-in from senior leaders. APLU as a national organization was able to leverage that buy-in on behalf of the student success teams. The teams then worked together to brainstorm possible solutions, then created and implemented different strategies to address the problem. In this practice, we defined success and established metrics to evaluate the outcomes. In doing so, we had an opportunity to reflect and evaluate the outcomes and discuss the context to understand the effectiveness of different drivers on success. The team then made adjustments to the treatment, and reapplied the model to see if improvement occurred. We did not frequently see success, but small improvements helped to keep the momentum going. So the four key takeaways from this experience: 1) Get buy-in from your senior leaders. That means addressing the needs that are important to them. 2) Don't go it alone, create and sustain a community of practice to work with you. 3) Use data to measure your outcomes. SMART metrics (Specific, Measurable, Achievable, Relevant, and Timebound) and share the results with your community of practice. 3) Be patient and manage expectations. This practice can become a model for continuous improvement.
- b. Karen V: Inherent in continuous improvement is change. We can't have one without the other, and adaptability is essential for both to occur. A culture of continuous improvement entails building a positive and collaborative data culture across the institution. This can be done by developing a data strategy. Shannon Lacount and Michael Weisman discuss this topic at length in a chapter found in the book, *Data Strategy in Colleges and Universities: From Understanding to Implementation*, edited by Kristina Powers:
 - 1. Create paths for input in strategy development (Listening groups)
 - 2. Communicate how and why decisions are made.
 - 3. Model good use of data
 - 4. Show the end vision. Get people excited about the goal, and then talk to them about what it will take to get there
 - 5. Encourage accountability and reward good data use.
 Having a strategy for continuous improvement within the context of data supports a healthy data culture. (need to flesh this out)

TIME CHECK: 10:46

5. What emerging opportunities can we leverage as IR professionals to expand our influence and impact? (2+ panelists: Denise, Jamie)

- a. Denise: Post-pandemic, historic assumptions no longer apply. There is a new hunger for data. Our old assumptions don't work in this new normal. There is an opportunity for IR to position itself to be valuable to change management. Here are 4 suggestions: 1) Relationships! People want to be connected right now... make those connections. Identify and reach out to key stakeholders and major players. 2) Issues! Understand the issues in higher education and the issues that matter to the institution. How can IR help your institutional leaders understand and address the issues? 3) Offer data! ... institutional, national, local, internal ... all data that address the issues. Bring it in. (Think of Billy Bean in Moneyball ... what new data did he bring in to help the Oakland A's build a winning team?). 4) Develop trust! Consistently reinforce what you can do and how it will be helpful.

Don't assume people know what you do. Don't assume that they trust you. If you tell them ... they will listen. Promote your work!

- b. Jamie: This is an interesting question for those of us working remotely. How can you be at the table when you are not even in the same state? Well, technology has finally made it possible, but all the same rules in the AIR article and that Denise mentioned still apply. Writing and all the other communication skills are more important than ever. Many of us are the data viz and storytelling experts at our institution. At Loyola Maryland we just had our marketing and communications office approach us for advice on building and publishing better vizzes. A good picture really does beat a thousand words. Who on your campus are going to be the AI experts? Start applying AI in some of your routine tasks. Start collaborating with some of your colleagues in other offices (like IT) and talk about data strategy AND security. Don't just be a data analyst; I'm an industry analyst who understands the bigger picture and is really good at informing decision makers about the issues (both internal and external) that are on their plate right now. Today it might be AI related. Tomorrow it might be about student success and gainful employment.

TIME CHECK: 10:51

MENTIMETER QUESTION #2: (1 minute)

6. During the COVID-19 pandemic, we saw a rapid rise in remote and hybrid work models. How have these new work arrangements impacted your role as an IR professional? (2 panelists: Jamie, Karen E)

- a. Jamie: During the COVID-19 pandemic, remote and hybrid work became a necessity. At LUM, they realized that the productivity of the IR office went up after going remote - commutes in Baltimore, like many metro areas, can be a nightmare (and that was before the Key Bridge got hit). We don't pay well (for a metro-university) so hiring remotely gives us a much bigger pool of potential applicants when positions open up. We're not student facing, so it works well for us. Our old office was in a house just off-campus. It now houses much needed visual and performing arts space for students and faculty, so this a win-win for the OIR and the University. I'd say our visibility has improved - at least partly, because we need to be more strategic about how we are supporting the campus leaders and collaborating with faculty.
 - i. Poll question #1: Is your office working 1) On campus 2) hybrid or 3) 100% remote
 - ii. Poll question #3: If you are hybrid or remote, has this impacted IR visibility 1) positively 2) negatively or 3) about the same.
- b. Karen E: During the COVID-19 pandemic, we saw a rapid rise in remote and hybrid work models, and this shift had a notable impact on my role as an IR professional. Prior to the pandemic, I had experience working remotely, especially during my time at for-profit institutions where I did not have a dedicated office space and primarily worked in the field or virtually. When the pandemic hit, I was already working on a hybrid schedule at a community college, and I believe that institution still continues to offer that flexibility today.

In my current role at the University of Maryland, telework in my area is limited to just one day per week, which adds complexity, particularly with the rise in virtual meetings. While virtual meetings make it easier to connect with colleagues and stakeholders, the increased volume of these meetings has become a challenge, especially with my limited remote days. If I had more flexibility in my telework arrangement, these virtual meetings would be more manageable, as I'd have more time to focus on tasks and projects without the added burden of a long commute.

At the moment, my total daily commute is nearly two hours, with about 45 minutes each way due to traffic. That means on days I work in the office, my 9-hour workday is extended by almost 2 additional hours. The increase in virtual meetings has made it harder to balance my workload. The more meetings there are, the less time I have to actually work on data analysis, reporting, and other related tasks that require deep focus.

Ultimately, the limitations on telework are making it harder to balance the demands of virtual meetings, in-office work, and other necessary tasks. I believe a more flexible remote or hybrid model would alleviate the strain of both commuting and excessive meetings, allowing for a more productive and sustainable work environment.

TIME CHECK: 10:57.

Q/A

CLOSE WITH THE FINAL MENTIMETER QUESTION IF THERE IS TIME.

Audience members will be encouraged to participate in this discussion by answering polling questions, asking questions to the panelists, and participating in an open discussion throughout the session. This session is intended for those interested in learning about the opportunities and diverse career pathways within and around institutional research, including those who are new to the field, those who lead teams interested in exploring possible pathways for their staff, and seasoned professionals looking for broader opportunities to leverage their IR knowledge and skills.

Aug 20, 2024 | 📅 2024 NEAIR Conference Panel Session

Attendees: Denise Nadasen Denise Nadasen James Redwine Karen Marie Egypt Karen S Vance
Notes

[W 2024 Conference Proposal Submission Form \(Final Submitted 2024-06\)\).docx](#)

- Proposed Updated Abstract:
 - In today's era of unprecedented change in higher education, the role of Institutional Research (IR) has ascended to new levels of importance. This interactive panel discussion aims to delve into the dynamic landscape of the IR profession, illuminating personal journeys, and transformative shifts over the years, including the impact of digital transformation on our work, and the emerging trend of professionals reimagining their alignment and identity within the IR profession. We will explore how IR professionals can strategically leverage their strengths to capitalize on new opportunities and shape the future of higher education. Join us as we navigate the complexities of what it **truly** means to be an IR professional in today's rapidly evolving higher education environment.
 - 2024 EDUCAUSE Top 10
 - #1. Cybersecurity as a Core Competency: Balancing cost and risk
 - #2. Driving to Better Decisions: Improving data quality and governance
 - #3. The Enrollment Crisis: Harnessing data to empower decision-makers
 - #4. Diving Deep into Data: Leveraging analytics for actionable insights to improve learning and student success
 - #5. Administrative Cost Reduction: Streamlining processes, data, and technologies
 - #6. Meeting Students Where They Are: Providing universal access to institutional services
 - #7. Hiring Resilience: Recruiting and retaining IT talent under adverse circumstances
 - #8. Financial Keys to the Future: Using technology and data to help make tough choices
 - #9. Balancing Budgets: Taking control of IT cost and vendor management
 - #10. Adapting to the Future: Cultivating Institutional Agility
- Proposed New Question:
 - During the COVID-19 pandemic, we saw a rapid rise in remote and hybrid work models. How have these new work arrangements impacted your role as an IR professional?
 - Jamie: I think what is most important is that it has facilitated the recruitment of the best talent and reduced overhead for institutions already cramped for space.

☐ Denise to create a graphic to display all IR functions or related functions to include: (please add)

- | | |
|---|---|
| <input type="checkbox"/> Federal and state compliance reporting | <input type="checkbox"/> Capital planning (facilities) |
| <input type="checkbox"/> External surveys (rankings, etc.) | <input type="checkbox"/> Data infrastructure (data warehousing) |
| <input type="checkbox"/> Internal surveys (student satisfaction and alumni) | <input type="checkbox"/> Data literacy |
| <input type="checkbox"/> Course evaluation | <input type="checkbox"/> Student success |
| <input type="checkbox"/> Faculty activities | <input type="checkbox"/> Assessment |
| <input type="checkbox"/> Enrollment management | <input type="checkbox"/> Advancement |
| <input type="checkbox"/> Budget | <input type="checkbox"/> Career services/outcomes |
| | <input type="checkbox"/> Dashboards/visualizations |

- ☐ Story-telling
- ☐ Benchmarking (peer analysis)

- ☐ Strategic planning and KPI's

