Communicate, Facilitate, & Negotiate: The Expanding Role of IR Professionals

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Association of Institutional Research
2015 Forum - Denver, CO
Florida SouthWestern State College

- Public
- Established 1962
- Fort Myers, FL
- Member of the Florida State College System
- Enrollment of 15,705
  - 100% undergraduate students
NY College of Health Professions

- Private – Not-For-Profit
- Founded in 1982 – Long Island, NY
- Academic Programs:
  - Massage Therapy, Holistic Nursing, Acupuncture and Oriental Medicine
- Total Headcount Enrollment – 736
- Average Class Size
  - 9.8 Undergraduate 7.7 Graduate
- Accredited by New York State and Commission for Acupuncture and Oriental Medicine
Wake Forest University

- Private-Not-For-Profit
- Founded in 1834
- Schools:
  - Arts and Sciences, Business, Divinity, Graduate, Law, and Medicine
- Total FTE enrollment – 7,637
  - Undergraduate – 4,839
- 6 year graduation rate – 88%
- Student/faculty ratio – 11/1
- SAT/ACT optional in 2009
Stetson University

- Private-Not-For-Profit
- Established 1883
- DeLand, FL
- Enrollment of 4,137

- Main Campus
  - 2,841 undergraduates
  - 346 graduate students
  - College of Law
  - 950 students

- 12:1 undergraduate student to faculty ratio
- Average HS GPA: 3.8
- 68% in state students
Bridgepoint Education

- Private-For-Profit
  - Based in San Diego, CA
- Two Universities
  - Ashford University (~58K)
    - AA, BA, MA programs
    - Online and face-to-face programs
  - University of the Rockies (~2K)
    - MA and Doctoral programs
    - Online and face-to-face programs
Purpose/Motivation

Evidence of Need for Soft Skills

IR Soft Skills in Action
  - IR as External Communicator: Presenting enrollment information
  - IR as Internal Communicator: Presenting data findings
  - IR as Facilitator: Facilitating departmental data use
  - IR as Negotiator: New academic approvals

Key Take-Aways

Questions and Comments
Purpose

This session is designed to help IR professionals identify and develop non-technical skills to facilitate the changing role of IR in many institutions.
Are You a Bridge Builder?
Do you provide SUPPORT?
Do You Help Put the Pieces Together?
Concern

- Many IR professionals focus on developing technical and/or content skillsets.
- Tendency to overlook development of “soft skills” such as effective communication, negotiation, and facilitation.
Concern

- “IR is about a function that is dominated by data collection and report writing. The analytical and communication function are less well developed, and largely siloed” (Gagliardi & Wellman, 2014, p. 24).
Challenges

- Historical lack of emphasis on possession of soft skills within IR
- Few formal opportunities for professional development/improvement
- Can be a sensitive topic to broach
“Effective institutional research offices possess researchers with strong quantitative skills, superb oral and written presentation skills, and excellent communication skills”
-- Presley, 1990, as cited in Delaney, 1997, p. 12

Institutional researchers need to:
- “increase their understanding and awareness of the political functioning of the organization”
- “increase the client-centered focus of institutional research” and
- “communicate the student voice to policymakers”

Evidence of Need

- Review of all typical IR job postings posted on HigherEdJobs.com as of 3/3/15

- 3 groupings:
  - IR Analyst/Specialist
  - IR Associate/Assistant Director
  - IR Director or higher (Director, Assoc. VP, Assoc. Provost)

![Job Postings by Level](chart.png)

IR Jobs posted on HigherEdJobs.com on 3/3/15

- 36 postings for Analyst
- 2 postings for Assistant/Associate Director
- 23 postings for Director or higher

Total postings: 61
70% of institutions included mention of soft skills within the job description or job duties sections.
82% of institutions included mention of soft skills within the qualifications or required skills sections.

<table>
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<th>Specific Terms Used by Institutions that Included Soft Skills in Qualifications/Required Skills</th>
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<tr>
<td>75%</td>
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<td>Communication</td>
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Based on review of 61 IR jobs posted on HigherEdJobs.com 3/3/15

Based on review of 61 IR journals on HigherEdJobs.com 3/3/15
Evidence of Need

Most Frequently Referenced Soft Skills

1. communicat*
2. writ*
3. present*
4. team*
5. work with*
6. collaborat*
7. oral/verbal*
8. constituen*
9. audience*
10. interpersonal*
11. support*

Number Soft Skills Referenced
IR Jobs posted on HigherEdJobs.com on 3/3/15

61 postings total
Required Skills

- Communicate - Externally
- Communicate - Internally
- Facilitate
- Negotiate

+ Data Skills

= Effective IR Professional

Template retrieved from www.SlideTeam.net
IR Soft Skills in Action: IR as External Communicator

Jeff Stewart, Ph.D.
Vice President Research, Technology, & Accountability
Florida SouthWestern State College
IR as External Communicator

- IR as an external communicator should….
  - Know the external party’s frame of reference – try to translate for them
  - Ask questions to test understanding
  - Educate others internally about external understanding

Retrieved from Microsoft PowerPoint; used with permission from Microsoft.
IR as External Communicator

- Work with your internal staff (both in IR and communications) in responding to external requests...
  - 99% of the external requests should be able to be answered with a standardized report
  - Very few "creative" or unique requests – often “same stuff”
  - Verify what is actually being requested
IR as External Communicator

- Typical IR Request – “What is the ENROLLMENT?”
- What does the requester really want?
  - Fall enrollment (headcount)
  - FTE
  - Unduplicated Head Count
  - A specific sub-set of “enrollment”
IR as External Communicator

Enrollment at FSW – 2014 - 2015

- Fall enrollment (headcount) – **15,705**
- FTE – **4475*** Total Student Credit Hour Production Divided by 30 (FCS definition)
- Unduplicated Academic Year Head Count
  - Summer 2014, Fall 2014, Spring 2015 - **21,251**
- A specific sub-set of “enrollment”

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*Students are assigned campus headcount based on where an individual student is taking the maximum number of credit hours. If credit hours are equal at multiple campuses, the student's headcount is assigned to the campus with the lowest headcount enrollment from the prior term. If credit hours are equal between a campus and FSW Online, the headcount is assigned to the physical campus.
IR as External Communicator

- Who is making the request?
  - President / Cabinet
  - Faculty / Staff
  - Media
  - Board of Trustees
  - Alumni / Donor / Community
IR as External Communicator

- What is the PURPOSE of the request?
  - Used in negotiations
  - Writing an article (positive / negative)
  - Justification of program / budget

- Knowing the political climate of the campus (how will the request be used?)

- Ensuring that all requests are accurate
IR as External Communicator

- Standardization of reporting
  - Prepare easily digestible summaries of commonly requested information
    - Ensures consistent information is used across campus
    - Use as basis for responding to external requests
- Branding of IR reports
  - Create an IR brand template to make official IR reports easy to identify
IR Soft Skills in Action:
IR as Internal Communicator

Ross Griffith, M.Ed.
Director of Institutional Research
New York College of Health Professions
IR as Internal Communicator

- IR as an internal communicator should....
  - Act as an impartial intermediary party
  - Communicate data findings to increase awareness
  - Interpret and foster communication between parties
IR as Internal Communicator

- Internal communications include:
  - Face-to-face meetings
  - Written reports/findings
  - Publishing survey results on IR web site
  - Mentoring others in understanding data
IR as Internal Communicator

- **Face to face** individual meetings with President, Vice Presidents, Deans and other key administrators
  - Actively listen to their roles and show interest
  - Explain data simplistically in positive and constructive manner

- **Face to face** meetings with key groups/divisions to communicate data
  - Trustees, President’s Cabinet, Faculty, Student Affairs, and Alumni/ Development
Examples of written data communications

- Alumni Survey results
  - Faculty “Turnover” an issue
- Analyses of Massage Therapy Exam rates and GPA’s
  - Certain and “same” demographic groups are lower
- New student survey results
  - Internet and Open Houses important for students to decide to enroll at the College
- Alumni Telephone Survey results
  - Indicate placement is high for graduates
Examples of **written** data communications

- **Senior Survey results**
  - Significant differences summarized simplistically

- **Health Services satisfaction**
  - Satisfaction significantly Lower for Health Services and by women students – Head doctor then hired first female doctor to “close loop”

- **Career Services Survey results**
  - Results indicated Career Services weak on providing Internships – More internships provided to “close loop”
Example of published survey results data
IR as Internal Communicator

- Mentoring staff of three “assistants” to understand institutional data needs
  - Communicate “Institutional Research is an Art and not a Science”
  - Present impartial user friendly data and summaries

- Mentoring campus data users to understand data terminology, reports, and findings
Roles of IR as Internal Communicator

- Chair Assessment Committee
  - Review and summarize simplistically data and analyses from past year
  - Get committee to agree upon improvements to close loop
- Chair Evaluation Committee
  - Composed of key faculty to obtain their “buy in”
  - Have faculty members present analyses of data at Faculty meetings for credibility
IR Soft Skills in Action: IR as Facilitator

Angela Henderson, M.A., M.L.I.S.
Associate Director of Institutional Research & Effectiveness
Stetson University
Institutional research is “research conducted within an institution of higher education in order to provide information which supports institutional planning, policy formulation, and decision making” (p. 1).


Retrieved from [http://www.airweb.org/EducationAndEvents/Publications/Pages/FunctionsofIR.aspx](http://www.airweb.org/EducationAndEvents/Publications/Pages/FunctionsofIR.aspx)
IR as Facilitator

- IR as a facilitator should….
  - Make data available
  - Make data usable
  - Foster campus discussions around data needs
  - Proactively clarify common misassumptions
  - Be a data steward, not data dictator
Example project: Development of campus data reports to support decision-making at the departmental level

- Immediately puts data in the hands of those who need it
- Predefined reports allow for easy comparison
- Critical considerations
- Feedback from users
- Examples of additional requests
IR as Facilitator

- Make data easy to use
IR as Facilitator

- Data reports
  - Built for data consumers
  - Predesigned reports save time and ensure that everyone is using the same figures and sources
  - Point and click dashboard appearance
  - Reports include enrollment, course capacity, faculty load
  - Downloadable summary and data files
IR as Facilitator

- Argos dashboard reports
# IR as Facilitator

## Course Seats Report

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IR Soft Skills in Action: IR as Negotiator

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Associate Vice President of Institutional Research Services
Bridgepoint Education
IR as Negotiator

- Negotiation is about understanding what each party is interested in and finding a common middle ground.
- New academic program approvals
  - Faculty Senate
  - Provost
  - Board of Regents/Trustees
  - Accréditor
- Need to work with people who do not report to you and motivate them to help you accomplish your goals.
IR as Negotiator

- IR as a negotiator should....
  - Remember timing matters
  - Identify the other person’s goals
  - Never waste a voice opportunity
  - Be “present” at the negotiation meetings
  - Listen – even if you *think* you know what the other person will say
  - Realize a little win is still a win

Retrieved from Microsoft PowerPoint; used with permission from Microsoft.
IR as Negotiator

- Negotiation Lesson
  - Identify the other person’s goals
- Application to IR
  - Development of a successful program and avoidance of future problems

Image from www.theartofliving.com.au
IR as Negotiator

- Negotiation Lesson
  - Timing matters
- Application to IR
  - New program proposals should consider supply and demand – which depends upon timing.

Image from: http://www.someecards.com/ecards/workplace/
IR as Negotiator

Negotiation Lesson
- Never waste a voice opportunity.

Application to IR
- Ask other questions about the process to gather information that will lead to a better proposal.

Image from: http://www.someecards.com/ecards/workplace/
IR as Negotiator

- **Negotiation Lesson**
  - Be “present” at the negotiation meetings.

- **Application to IR**
  - We are pulled in many directions at a time, but pay attention to the details.

Image from: http://www.someecards.com/ecards/workplace/
IR as Negotiator

I'm going to have trouble taking anything you say seriously today or any other day of the year.

- Negotiation Lesson
  - Listen – even if you think you know what the other person will say
- Application to IR
  - Identify a person’s subject matter expertise and how to integrate it beneficially
IR as Negotiator

- Negotiation Lesson
  - A little win is still a win.
- Application to IR
  - Focus on continuous improvement – it is still improvement.

Image from: www.pintrest.com piotroski.soup.io
Translate data for audiences

Communicate data findings

Be a data steward

Consider:
Audience needs, varying definitions, political implications

Communicate via:
Face to face meetings with departments, publishing findings in reports and on IR website

Facilitate data use:
Promote data use - make data available and easy to use, encourage perception of IR as data collector, not owner.
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