

# Technical Review Panel No. 30 Tools and Resources for Reducing IPEDS Burden

## Final Actions

On March 2 and 3, 2010, RTI International, the contractor for the IPEDS web-based data collection system, convened a meeting of the Integrated Postsecondary Education Data System (IPEDS) Technical Review Panel (TRP) in Washington, DC. The purpose of this meeting was not to decrease the amount of information collected by IPEDS, but rather to identify common sources of institutional burden and develop strategies to minimize reporting burden by making it easier for institutions to report data. The panel consisted of 37 individuals representing the federal government, state governments, institutions, data users, association representatives, and others. The TRP examined issues that affect reporting burden and discussed strategies and additional steps to offer to institutions to enable them to be more effective and efficient in the preparation of IPEDS data.

A summary of the TRP's suggestions was posted to the web for public comment following the meeting and left open for 30 days. The comment period closed on April 28, 2010. We received no comments from interested parties. Based on TRP discussions and RTI recommendations, NCES has taken the actions listed below.

### Discussion Item #1: Targeting Information and Training to New Keyholders

Considering the varying levels of new keyholders' and other data providers' knowledge and expertise about IPEDS, RTI recommended that those with less knowledge and experience would benefit from additional information about the purpose and value of IPEDS data to answer questions such as the following:

- Why do I need to do this?
- Where do the data show up outside my institution?
- What is the link between IPEDS and the "public face" of my institution?

#### New Keyholder Handbook

NCES has developed the *New Keyholder Handbook* that answers these and other questions of use to those new to IPEDS. The handbook is available through the IPEDS Data Provider Center and referenced in many resources, announcements and materials made available to keyholders and coordinators.

#### New Keyholder Workshop

The Association for Institutional Research, AIR, subcontractor for development of IPEDS training initiatives, has developed a face-to-face workshop specifically for new keyholders. The *New Keyholder Workshop* provides participants with a thorough introduction to the IPEDS data collection cycle and reporting requirements, outlining the roles and responsibilities of a keyholder and the resources available to assist in the IPEDS planning and reporting processes.

The TRP discussed the fact that providing detailed training for all IPEDS survey components in one module inundates new keyholders with a great deal of information, and they are likely to ignore or forget the key concepts. Thus, the training should emphasize key concepts, rather than provide detailed step-by-step instructions for each survey component. Examples of key concepts include defining the following terms for the survey components:

- “full-time, first-time student”;
- “cohort”; and
- “full-time instructional staff”.

#### Key Concept Tutorials

Working with NCES, AIR developed new tutorials, each a few minutes in length and based on a key concept that is critical to IPEDS reporting. The tutorials have been embedded in the data collection screens and are also available from several locations in the IPEDS Data Provider Center and from the AIR website. These, tutorials are now available to new keyholders and anyone interested in IPEDS data and data submission. Topics include: identifying first-time students; the graduation rate cohort; and calculating net price.

The panel also discussed the importance of ensuring that new keyholders are aware of the resources available to them. Further, because collaboration with other departments is often necessary to gather, prepare, and finalize data, the new keyholder resources should emphasize the keyholder’s responsibility to communicate with additional data providers.

#### Increased and Targeted Communications

NCES and the IPEDS Help Desk (RTI) have increased the number of communications directed to new keyholders. If a keyholder self identifies as “new”, they then receive several targeted emails. For example, at the beginning of a data collection year, new keyholders now receive a “welcome email” calling their attention to the wealth of resources available to them to aid in their IPEDS reporting. The Help Desk also sends new keyholders additional reminder emails throughout the data collection period.

Additionally, the data collection system now allows keyholders to provide contact information for additional institutional staff who are involved in IPEDS reporting. Currently, the keyholder can provide contact information for additional institutional contacts specific to student financial aid, finance, and human resources reporting. This has allowed NCES and the IPEDS Help Desk (RTI) to communicate directly with these contacts about critical issues specific to the survey components in which they are involved, and further enables and encourages keyholder communication with these colleagues and additional data providers at their institution.

## **Discussion Item 2: Developing Additional Worksheets and Tools That Would Enable Institutions to Prepare IPEDS Data More Efficiently**

The TRP suggested and RTI recommended that the development of tools to help institutions increase automation of IPEDS reporting be considered if the tools can be made flexible enough to accommodate various institutional data structures. The utility of such a tool depends on the context of the institution and the extent to which the institution can benefit from the tool. At this time, the feasibility of developing a tool to help institution's prepare their IPEDS reports is being explored and the potential role of the Common Education Data Standards (CEDs) initiative is also being considered. Still, efforts designed to help institutions report IPEDS data more efficiently have been taken.

### XML Upload Option

The ability to upload data has been recognized by many keyholders and coordinators as an efficiency for their IPEDS reporting. As a result, RTI and its subcontractors have been phasing in the capability to upload data using an XML format since the 2009-10 data collection year. XML upload is now available for each of the student based survey components.

### Best Practices Workshop

AIR developed a new workshop, *Best Practices for Reporting and Using IPEDS Data to Improve Office Efficiencies*, which is designed for individuals who lead the IPEDS data submission cycle on their campus and have done so for at least one full reporting cycle. Focusing on IPEDS, participants are introduced to best practices and technical efficiencies in data management and examine multiple options for IPEDS submission (manual entry, .csv file upload, and XML).

## **Discussion Item 3: Additional Resources for Keyholders**

The TRP suggested and RTI recommended that NCES develop an optional work plan to help new keyholders manage the collection cycle from data gathering to data dissemination. When considering appropriate formats and delivery methods for a work plan, a web-based dashboard application would provide the most utility. The dashboard would provide a centralized access point for locating resources and include a modifiable work plan and calendar that allows keyholders to track their progress in the collection cycle. Although a dashboard application was not developed, actions have been taken to help keyholders manage the collection cycle.

### New Keyholder Workshop

The workshop, described earlier, was designed to include the opportunity for participants to create an IPEDS planning calendar for the upcoming data collection cycle.

### Targeted Workshops

NCES and AIR have made a concerted effort to promote workshops to institutions that are small, have fewer resources, and/or operate on non-traditional calendar systems. These targeted workshops can zero in on issues of particular concern to these institutions.

### Data Collection System and IPEDS Website

In addition, enhancements have been made in the data collection system that allow a keyholder to more easily identify what components have not yet been completed and the deadlines for submission. Finally, the Resource Center on the IPEDS website now contains a wealth of information such as the data collection and dissemination cycle, upcoming changes for IPEDS surveys, information on reporting students and staff by race/ethnicity, the Classification of Instructional Programs (CIP) and the Standard Occupational Classification (SOC).