

HEI Advisory Committee Meeting Notes July 7, 2000

Attendance:

Rosemary Jones	Cuyahoga Community College (Committee Chair)
Ralph Gutowski	Miami University (Committee Vice-Chair)
Meg Sidle	Central State University
Chris Dalton	Bowling Green State University
William Knight	Bowling Green State University
Barbara Bullock	Wright State University
Richard Stratton	University of Akron
Wynette Barnard	Lakeland Community College
Jed Dickhaut	Ohio State University
Barb DeYoung	Ohio State University
Ila Anderson	Belmont Technical College
Debbie Misel	Washington State University
Darrell Winefordner	Ohio University
Terry Mellow	Washington State University
Stephanie McCann	Ohio Board of Regents
Kirk Trickett	Ohio Board of Regents
Becky Geltz	Youngstown State University
Denise Krallman	Miami University
Wendy Wiseman	Marion Technical College
Lyn Sullivan	Terra State Community College
Robert Sikula	Kent State University
Gitanjali Kaul	Ohio University
Marie Zeglen	Cleveland State University
Leslie Nicotera	Kent State University
Patsy Scott	University of Toledo
Daryl Wright	University of Toledo
Larry Hunter	Columbus State Community College
Mike Williford	Ohio University
Joan Patton	Sinclair Community College
Robert Burke	Association of Independent Colleges
LeAnn Conard	Ohio Board of Regents
Deborah Gavlik	Ohio Board of Regents
Beverly Farmer	Ohio Board of Regents
Harold Horton	Ohio Board of Regents
Chris Doll	Ohio Board of Regents
Andy Lechler	Ohio Board of Regents
Rob Sheehan	Ohio Board of Regents
Stephanie McCann	Ohio Board of Regents
Bob Hallier	Stark State College of Technology
Sharon Blankenship	Lakeland Community College
Michael Long	Ohio Board of Regents
Cindy McQuade	Inter-University Council of Ohio

Issues Discussed

OBOR/HEI Reorganization

Harold Horton reported that Rob Sheehan has been promoted to Associate Vice Chancellor for Reporting and Analysis. In his new role, Sheehan has assumed many of the duties that Matt Filipic previously held, including responsibilities connected to the Governor's Higher Education Performance Report on Higher Education, the Graduate Funding Commission, and instructional subsidy meetings. Harold Horton has been promoted to Director of HEI. As he assumes his new role, HEI will be reorganizing so as

to combine programmers and analysts under his leadership. Horton and the analysts will move to 65 E. State Street. To assist Horton, Jay Johnson and Stephanie McCann have been promoted to Assistant Director positions. Johnson will work with the enrollment staff and McCann will work with the financial, faculty, and facilities staff.

Sheehan noted the increasingly important role that HEI, and therefore, the HEI advisory committee, will play as the Regents attempt to address the performance reporting challenge and other state issues.

Liaisons Issues

The Committee Chair explained that liaisons were invited to this advisory committee meeting as a response to the liaisons meeting that took place at the HEI Users Conference in March. At that time, concern was expressed by liaisons as to whether advisory committee members were adequately in touch with liaison concerns. The invitation to liaisons was for the purpose of improving communication between liaisons and committee members.

The Chairperson began the discussion by stating that notes from all advisory meetings are available on the WWW. Liaisons can keep themselves informed of advisory committee activity by accessing the pages at: <http://www.regents.state.oh.us/hei/advcom/acpage.html>. She invited liaisons to contact or write advisory committee members as concerns arise and assured liaisons that liaison issues are advisory committee issues.

Another advisory committee member noted that the discussion that took place at the liaisons' meeting at the HEI Users Conference was a good discussion and it was the first time that liaisons had ever sat down together. Future meetings of the liaisons might provide benefits.

Sheehan explained that while Regents do not dictate rules to campuses with regard to their staffing situation, they have created a system that demands one or more persons to attend to data needs. He added that it should be recognized that this need has always existed on campuses, but HEI has made that need more formalized. In recognition of this need, Regents staff and the advisory committee have sent a number of letters to presidents expressing the need for additional funding to be directed toward departments with HEI responsibilities. In addition, Sheehan noted that we have moved from a rigid "one liaison per campus" position to a policy that allows back-up liaisons. He asked representatives to please be aware that Regents staff are supportive of their needs but are not empowered to do as much as they might like.

A campus liaison noted that servicing HEI is not highly valued on campuses because it is not perceived as meeting institution needs. He suggested that HEI staff might consider putting priority on queries for campus type issues. Then perhaps campus officials will put more value on the data and the resources at campus level.

Campus representatives identified some ways in which they find HEI data useful. One advisory committee member commented that, for planning course offerings, she uses the HEI queries to identify courses offered by other community colleges that are identified at the baccalaureate subsidy level. Another advisory committee representative uses it to see where the enrollments at his institution are in relation to subsidy level. He noted that the data are not in a format that is easy to use for decision making, and that he has to format it. In addition, HEI allows him to see winners and losers in different proposals of the funding commission.

A campus liaison commented that while HEI is good for planning and providing data for historical trends on a campus, it will never provide a basis for 14-day reports, which are required before the end of quarter. In general, officials on her campus will always want data before end of term. An advisory committee member and Horton explained that HEI is not intended to replace internal systems, but to enhance those systems. Horton also pointed out that query capabilities are new in the past year, so HEI staff members are still enhancing queries. If HEI staff can do anything to create standardized reports that will help representatives, representatives should communicate to Horton specific requests.

An advisory committee member noted that he uses HEI queries to combine student characteristics and course characteristics. He sees drawbacks in the timing of data, format of data, and his own lack of time. He also stated that he intended to use HEI's cohort tracking capabilities and its future connections to OBES data.

The committee chair suggested that the Ohio chapter of AIR have demonstrations of use of HEI data at its next meeting. Participants were encouraged to write Bill Knight the president of OAIRP, with suggestions and to volunteer for HEI presentations. In addition, the chair recommended that liaisons meet regularly at Fall OAIR conferences to share concerns and enhance communication.

One campus liaison indicated that she encountered problems with an HEI query that that delayed her access to another school's data. She was concerned because her president thinks that she can get HEI data to him immediately. When those data are not available on the Web site, she looks bad.

Sheehan explained that HEI has only been releasing data that has been finalized. HEI staff are working to allow data to be available even though some enrollment files are being revised. This should make data more available.

A liaison expressed concern about the poor communication from the advisory committee to her president about the workload associated with HEI. An advisory committee member noted that the advisory committee members are sensitive to the disconnect on campuses between users and reporters to HEI and the Presidents. He said that the committee does try to get word to the Presidents.

It was suggested that one of the greatest values to campuses from HEI will come when it is possible to do transfer tracking. Horton has been working to resolve FERPA issues. He has had multiple conversations with the Attorney General's office and other states that are able to do it and is continuing to iron out a policy. He noted that HEI can provide an aggregate report through the Cohort Tracking (CT) file to assist campuses with transfer-out reporting. He also pointed out that HEI will later be able to provide employment information on graduates since employment data are not bound by FERPA.

A campus liaison questioned if access to queries can be granted on a data area basis, or on an individual query basis. She believes that enrollment people should only have enrollment query access, instead of everyone having access to all.

Sheehan said that technically it was most efficient not to break out queries by data area or by individual query. Instead most queries are in a single grouping called "restricted queries." The result of that grouping is that if an individual is given access to the queries, they are given access to all the queries. He also noted that some of the best designed queries are those that cross data areas. When a single query crosses data areas, we would not be able to break up the query by data area anyway. In short, we do not have capability to have people have different access to different queries. In addition,

Sheehan believed it was a bad idea to break the queries into groupings for two reasons. First, it would be a very labor-intensive project that would keep HEI staff from other concerns such as working out transfer tracking issues and providing other queries. Second, there are too many data silos on campuses as it is. We want to encourage information sharing. We should see the HEI queries in terms of an education perspective.

Another campus liaison asked that campuses be able to see data before it is used in consultations and meetings. An advisory committee member agreed and noted that sometimes an institution can do everything under the sun to be sure the data are correct, but it is not possible to know if it is correct until it is used.

Sheehan sympathized with their concerns, but also pointed out that they probably don't want to see the numerous drafts that are produced prior to meetings. In addition, it is important to note that no one is blaming the data reporters for bad data. There is an assumption at the regents that there will be changes when the data are first considered. "We are assuming that it is a first discussion to have people go back on their campus and have discussions about the data. We don't count these drafts as final."

It was agreed that a message would go out for the consultations that are considering data that makes clear to the consultation representatives that data are still "raw." In addition, when possible, if there are consultations that are using data, a message would go to liaisons in advance, informing them that there is an ongoing set of consultations that is using HEI data.

An advisory committee member noted the need to have a full-time position be funded by campuses and for advocacy for an HEI line item. Sheehan and the IUC representative replied that, last year, the line item for HEI was turned down by the the Higher Education Funding commission.

Sheehan agreed to bring a proposal on behalf of the committee to the Higher Education Funding Commission consultation for the institutional support portion for HEI to be increased. It was also recommended a list of HEI responsibilities be established by Regents staff. Horton will work with Knight, Bullock, Patton, Stratton, Sidle, and Geltz to put this list together.

A campus liaison asked if the campus liaison could be the point person for all Regents data requests. The committee chair noted that there are certain protocols that prevent the liaisons from always being the campus contact for all Regents correspondence. She pointed out the importance of recognizing that there are institutional communication issues that HEI cannot address. She believed that the Regents staff does try to be sensitive to getting information to the liaisons.

With regard to *ad hoc* data requests and changes to the HEI system: Sheehan pointed out that HEI is working to minimize *ad hoc* requests and changes to the system, and advisory committee member indicated the need to note that definitions change when we do longitudinal studies. Another advisory committee member assured liaisons that the advisory committee works to be sure that the Regents do not require unnecessary new data requests and changes.

Liaisons were told that they would receive a copy of the minutes of today's meeting. In addition, an email would be sent to new liaisons that introduced the advisory committee and made liaisons aware of the advisory committee's role. Finally, when possible, liaisons would be copied on correspondence from Regents to presidents and fiscal officers.

Demonstration of New OBR WWW Pages

Kirk Trickett provided a demonstration of the new look that is currently being developed for the OBR Web site. He will be sending out a user survey to advisory committee members and liaisons that will collect feedback on their satisfaction of the current HEI home page. At the next committee meeting, he will provide a demo of the new HEI home page.

Cohort Tracking (CT) file demonstration

Lechler demonstrated the new Cohort Tracking (CT) file. The CT file contains a list of degree seeking students reported in the IPEDS Graduation Rate Survey (GRS) for a given year. When this file is free from errors the CT report will display mobility (transfer-out) and graduation rates synonymous with the GRS. Each student identifier that is found at another institution after the Cohort Year will be identified in the CT report as a transfer-out. Each student identifier that is found to have graduated from another institution within 150% of the normal time associated with completing a baccalaureate or associate's degree after the Year and Term of First Enrollment will be identified in the CT report as a completer. Results will be further broken down by race, sex, and the type of institution the student transferred to or graduated from.

Agenda for next year

An advisory committee member asked if the advisory committee should begin to meet quarterly rather than monthly. There was general consensus that a quarterly meeting would probably meet their needs. If an issue comes up that should be discussed before the established quarterly date, a special meeting will be convened. Advisory committee meeting dates for the next three quarters are: **October 20th, February 23rd, and April 27th.**

Miscellaneous Status Reports

Sheehan reported that the Higher Education Performance Report committee is using HEI to look at enrollments, faculty-student ratios, fall retention. They are now developing the list of specific data elements that will be used for performance reporting.

LeAnn Conard reported that the first year of reporting on the Proficiency Award (PA) file is now complete. This is the first file for the financial aid data area, and future files are under development.

Horton reported that 80% of the tables associated with the Student Inventory Data has been programmed. The draft of the reports were shown to the committee.

McCann reported that the data are in from the Part-time Faculty Survey. Representatives can expect the report in the fall.

Andy Lechler stated that Resource Analysis (RA) is running now for first time and that it will result in the RA query.

Chris Doll reported that the financial data area had been in production for one year and that it has been reevaluated to reduce campus workloads. The goal of the evaluation was to eliminate files where possible, eliminate unnecessary file dependencies, and to be sure that the submission process reflected good campus business practice. The result of the review is the following proposal:

For fiscal year 2000 Regents staff propose the following:

1. Elimination of the Actual Data (AD) Cross Edit of the Changes in Current Funds (CF) file, Changes in Funds Balances (CB) file, and the Assets and Liabilities (AL) file. Each file would have its load programs and would not necessarily have to wait on the others for loading. Campuses would also be able to delete bad data more easily than in the current set-up. In this scenario, year-end data would be collected in two streams—one stream would be the CF file followed by the files that provide more detail about the current funds (CX, CP, FX, FF, IO, SR, EE, AU, and HP), the other stream would consist of the CB, AL, IT, and AF files.

2. Reorder the file submission sequence for the financial files used in the Resource Analysis (RA) from a bottom-up approach to a top down approach. Currently campuses are supposed to submit (in order) the Faculty Funding (FF) file, the Funding Unit Expenditure (FX) file, College Expenditure (CP) file (an optional file, used mainly by universities), and then the Campus Expenditure (CX) file. The new format would simply reverse the above and have the CX as the first submission, followed by the CP for those campuses that submit it, the FX and then the FF. In this reporting scheme each file would look to its predecessor to ensure that there are enough funds in it to cover its costs.

For fiscal year 2001 Regents staff propose the following:

1. Eliminate the Funding Unit Inventory (FI) file, beginning Summer 2000, and use the FX file as the master list of funding units.

2. Eliminate the link between the FI and the Course Sections Taught (ST) file. The FX would have an edit to ensure that all funding units reported in the ST file during the year are represented in the FX submission.

3. To facilitate FX reporting Regents staff will develop a query that will relate the funding units used in the ST throughout the fiscal year. These funding units will need to be in the FX file submission.

4. Add a "College" field to the FX file submission. A "College" field would be required only if the campus reports a CP file submission. If the campus does not submit a CP, then it need not submit a value in this field.

There was general agreement that these changes seemed reasonable. A memo will be sent announcing these changes.

Next Meeting: October 20th

Minutes submitted by Stephanie McCann