Ohio Board of Regents/Institutional Data Planning Consultation
May 27, 2009 10 am to 3 pm
Rhodes Tower, 36th Floor, Columbus, OH

1. **Wrap-up CIP reclassification discussion**

   a. A brief discussion ensued regarding the approximately 1,100 CIP codes that are present at Ohio's public higher education institutions, present and proposed number of subject fields and the present and proposed discipline areas. A spreadsheet was provided that included information on number of degrees and FTE's in the current & proposed subject field and discipline area mappings.
   b. A discussion occurred, where the degree & FTE spreadsheet was examined by all the participants to discuss the new proposed classifications.
   c. Possible mapping file to monitor the changes that would occur given the new classifications?

2. **Begin STEM designation discussion**

   a. A discussion followed on what logic was to be used when looking at assigning CIP codes or subject fields to the STEM disciplines. With STEM being a proxy for 3 different reasons: reporting task (academically), Choose Ohio First Scholarship (determined by a review panel) and funding implications. The consultation group has influence over the reporting of the USO metrics and will take the guidance of the group in determining the reporting criteria for the metrics' reporting.
   b. An idea was proposed to focus on academics would agree as STEM areas and that would include multiple areas within disciplines, both STEM and not.
   c. What is identified as technology….multiple areas can be described as technology?
   d. Ideas & Principles for STEM Designation:
      1. Mathematical Rigor and Content
      2. Computer Applications
      3. Laboratory Emphasis
      4. Utilizes/Applies New Technology
      5. Relies Upon Scientific Method
   e. Provide a crosswalk for current subject field to proposed subject field for both degrees and FTEs.

3. Reporting Issues

a. Headcount Enrollment – Issues with double counting across campuses and institutions

Given the prominence of the Strategic Plan goal of increasing headcount enrollment in Ohio's public institutions by 230,000 by 2017, we have been thinking more about how we count students in our enrollment reports. A relatively simple thing like counting students is complicated by the existence of multiple-campus institutions and campus-hopping students.

i. Current practice – We report headcount for fall term. The reporting unit is the campus, not the institution. Adding up the individual campus enrollment figures for multi-campus institutions like Ohio University and Tri-C overstates institutional enrollment to the extent that students take classes at multiple campuses in the same term. There is also a double counting issue with students who attend multiple institutions, such OSU and Columbus State.
   - The question was raised about how institutions with multiple campuses perform headcount for internal purposes and the answers varied depending on each institution's policies. In addition, the idea was raised about having multiple ways of counting depending upon the circumstances surrounding the required report.
   - Consensus from the group seemed to revolve around the idea of reporting in two different manners: students served and students enrolled.
   - A discussion on how to count students that have enrollment at multiple campuses and how to be able to distinguish the individuals on branch campuses and main campuses, as well as how the figures for the Strategic Plan and the metrics templates were generated. We are looking to create an unduplicated enrollment count by institution in the future.

ii. Rationale for current practice –
   1. This might be partially the result of inertia. We had practices set up during a time when campus hopping was either less prevalent or less noticed. The double counting issue sort of snuck up on us.
   2. We have conflicting reporting needs. If a school has multiple campus locations, people naturally want to know what level of business is being conducted at each place. So, there is a need to report at the campus level. Then, reporting convenience and "neatness" concerns steer you in the direction of reporting at the campus level, then adding up those figures to get the institutional enrollment. Then you have double-counted.

iii. Resolution – Is there a way out of this? Options include:
   1. Status quo. We need to know about levels of enrollment at the campus level. Maybe the issue of double counting across campuses is not a big enough problem that we need to solve it.
   2. Report enrollment at the institutional level, not by campus. Somehow, I don't think this will work across the board.

3. Adopt different rules for different institutions. If an institution's campuses have a very high level of cross-enrollment and the campuses are close geographically, report as an institution. If cross-enrollment is "minimal," report at the campus level.
4. Adopt a more complicated reporting format. Report both campus-level enrollment and unduplicated institutional enrollment. Have discussions about which method is appropriate for particular purposes and hope that we can keep it all straight.

a. Personnel Reporting – Replacing old Basic Data Series personnel and staff reports
    a. All Employees tabulations from AM file (November snapshot)
        i. We seem to have decided to report employees by Work Category (EEO type: Executive/Managerial, Clerical, Faculty, etc.) instead of by Funding Group.
        ii. We are receiving an increasing number of requests for diversity data on employees. Generally these have been focused on specific institutions. We should consider developing a standard set of reports that present information on the race and gender of employees. Age is another characteristic to consider. I am not proposing that we publish these, but having reports like this "on the shelf" that have been reviewed for accuracy would streamline our operations.
            - A discussion followed on what other types of employee reports would be useful for internal uses or for the institutions' purposes.
    b. Faculty reports
        i. The old BDS reports contained a set of tables presenting data on various characteristics of personnel who have Faculty Demographics file (FD) records. There are a number of problems with those reports. The FD file contains records for many non-faculty personnel, so these reports don't really tell us the characteristics of faculty. Also, the FD is an annualized "bucket" file with records for anyone who had a faculty designation or who taught a class over an entire fiscal year.
        ii. We are proposing that a better way to report on faculty characteristics would be to begin with the AM file and identify all personnel who are in the Faculty work category as of November 1 of each year. If a data element is in the AM file (race, gender, age, etc.) we will draw the data from the AM file. We will use the Faculty Demographics (FD) file to get characteristics such as Tenure Status and Faculty Rank.
            - A discussion ensued regarding the use of SSN's for faculty & staff counts and reports. In the past, the AM file was an independent file and was not used for selecting the cohort (as proposed), to then be matched with the FD file for faculty counts. A conversation on possible solutions to create accurate faculty counts was discussed for future employee & faculty reports.
            - The use of SSN's and the possibility of using alternative ids in the future was discussed, where the consequence of not being able to match to external databases was provided as a reason for continuing the use of SSN's.
        iii. We need to reconsider what kinds of reports we want to publish on faculty.

b. Reporting on New Tuition and Financial Aid data – At some point, we will begin reporting on the a variety of "net tuition" outcomes from the new tuition and financial aid files. Data are still incomplete, but there are a number of reporting issues that we should be thinking of earlier rather than later.
    a. Reporting period – At the moment, we think it is better to report the net tuition results for a single fall term (annualized to a 9-month equivalent). There are complications that arise when we use data for all terms. Students change from FT to PT over time, students drop out, etc.
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    b. What to report for Tuition and Fees. Draft reports that have been circulated have taken an all-inclusive approach to tuition and fees reporting – all charges, not just tuition and general fees have been included. This ought to be discussed further.
        - What to include in gross fees? Should we report other fees separately?
        - Issues were raised concerning the reporting of records for tuition and fees, specifically dealing with the annualization of tuition and fees if the only term used were to be fall term.
    c. We have not discussed how to report results for community colleges that have in-district and out-of-district tuition levels. Draft reports have lumped them together, and that might not be the best idea.
    d. How to distinguish resident versus non-resident students? Options include using the Student Enrollment records in the HEI files, or using the Out-of-state surcharge data in the tuition file.
        - What is the best way to identify residency, is it by looking at the residency status in the student enrollment file or by looking for a out-of-state surcharge in the tuition file.
        - If the intention to calculate out-of-pocket cost, then look at the cohort model for students who stay for the whole year rather than annualizing the data.
    e. Other issues? This is a good time to get picky and precise. The first time that you release a report is your best time to get it right.