

Institutional Research and Decision Support News

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IR&DS Announcements

Missy Damon will return from maternity leave on January 20, 2009.

We are sorry to report that Anita Craig will not be returning to IR&DS. Although she is doing well, her current state of health will not allow her to return to work for the foreseeable future. Lillian Lee will assume her responsibilities. See article on Page 4 for more details.

Strategic Reporting Initiative Project Proceeding

As discussed in this space last quarter, each year many proposals for funding of technology projects go before the Systems Governance Group (SGG) for discussion. These projects range from security and backup for Stanford's data to enhancements to Stanford's many administrative systems.

This August, Tana Hutchison from the Controller's Office made a presentation to SGG at their annual meeting, proposing a project to address the issues related to using multiple reporting tools at Stanford. The problem statement presented to SGG noted that "campus users struggle with differences/inconsistencies between reporting tools and data (i.e., RM3, RM1, Hyperion, DSS, etc.). Stanford has implemented diverging reporting tools while future needs and technologies are driving toward convergence."

"First, the team wanted to gather data to understand the scope of the problem."

Tana proposed a zero-cost project to form a team that would work to understand and address the issues related to multiple reporting tools on campus. The Strategic Reporting Initiative team consists of: Mario Acquesta (HR Information Systems), Pat Deasy (School of Medicine), Tim Flood (Registrar's Office), Andrew Harker (University Budget Office), Vijay Gandra (Administrative Systems), Rana Glasgal (IR&DS), Tana Hutchison (Controller's Office), and Minh Nguyen (Administrative Systems).

The team began meeting in October to lay out an approach for the project.

First, the team decided to gather data to understand the scope of the problem. The data gathering phase, started in the late fall and still ongoing, consists of several elements:

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Programs with a Mission

Stanford faculty, assisted by Jenny Bergeron of IR&DS, are working to create mission statements for their academic programs that will appear in the Stanford Bulletin in the 2009-2010 academic year. While many programs created mission statements for the 2008-09 Bulletin, many had not yet done so and IR&DS is stepping forward to help.

These mission statements will make academic program goals and visions more transparent to the University community and to its students. Mission statements are broad statements about what a program is,

what it does, and for whom it does it. They can be helpful to both faculty and students in that they guide course and curriculum planning when all major stakeholders are involved, serve as reference points for program review, and describe general expectations for students so that learning may become more intentional.

Understanding and articulating what a program is trying to accomplish is the first step in developing a plan to monitor and to improve a program. For a mission statement to be effective, it is important that

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Using the Oracle Financials General Ledger Universe in DSS

Last spring, when DSS converted from using the “old star” to the new EDW tables, we created a new universe called “OF GL Data”. This new universe provides greater functionality than the old star, but has also raised some common questions. We will address those here and provide some tips for using this universe successfully.

The OF GL Data Universe contains data from the Oracle Financials General Ledger. This means it will include assets, liabilities, beginning balances, revenue and expenses.

When using this universe, be sure to add a condition such as “GL Code matches pattern 4%” if you are only looking for revenue data, or “GL Code matches pattern 5%” if you want expenses only.

There are two amount objects (fields) for use in the universe. The “Actual Amt” object is to be used to report on a month to date (monthly) number. If you include the Month Name object in your report you will get amounts by month. This should only be used when looking at revenue, transfers and expenses.

By contrast, to retrieve beginning and available balances you should use the “Year to Date Actual Amt”. The “Year to Date Actual Amt” allows you to get a number that is a

point in time such as the end of August 2008. *Balances are best looked at as a year to date amount, not monthly.*

When using the “Year to Date Actual Amt” object you will always be prompted to enter an ending period (format: MMM-YYYY) after you hit the run button. DO NOT use the Actual Amt and Year to Date Actual Amt in the same report; this will produce an error.

To produce a summary year to date fund statement with beginning and available balances by award try this:

In the Results Objects section include these objects:

- Fiscal Year
- Award #
- Fund Statement Lev 3 Name (located in folder Fund Statement Hierarchy Rollup)
- Fund Statement Lev 5 Name
- Year to Date Actual Amt

In the Conditions Objects section include these conditions:
Award# = ABCDE
Fiscal Year = YYYY

You will be prompted to enter a 1 for the Stanford set of books or a 2 for Endowment set of books. You will also be prompted to enter the ending period that you want the report through to such as AUG-2008 or DEC-2008.

Strategic Reporting, continued

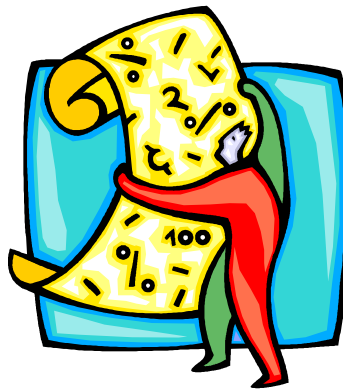
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1. an inventory of users of the major reporting systems to understand how many users are involved with more than one reporting tool
2. a survey of Stanford’s peer institutions’ use of reporting tools, and
3. an opinion survey of multiple reporting tool users at Stanford.

Other data gathering tasks include understanding the future of the software and tools we currently use, such as Business Objects, Hyperion Reporting, and Oracle Financials/ PeopleSoft HR/SA. The team is attempting to meet with representatives from Oracle (Hyperion) and Business Objects in the near future to gain some insight and inform our planning.

Reporting users will shortly have a chance to participate in this effort by completing a survey, as mentioned above in #3. Users of more than one reporting tool will be sent

a short survey asking about reporting usage, training, priorities, and experiences. We encourage all those who receive the survey to complete it—the responses will greatly help inform the team’s efforts. The survey will take about 10 minutes to complete. If you do not receive a survey in the next few weeks but would like to participate, let any member of the team know.



The project team has also begun to envision and brainstorm what an “ideal” reporting environment at Stanford would look like.

The end deliverable of this project will be a document with results of the data gathering and benchmarking effort, a summary of the current strengths and weaknesses of reporting at Stanford, and a long-term roadmap for improving reporting at Stanford. The group intends to complete the project this summer.

Upcoming Changes to Race and Ethnicity Data

The federal government has made changes to the way race and ethnicity are collected and reported by colleges and universities, and Stanford will be implementing these changes over the next year or so. For those of you that use race and ethnicity data, it is important to understand those changes, when they go into effect, and how they might affect the data you use.

The government has mandated the use of the “two-question format” for collecting race and ethnicity data. Part one of the question is considered the “ethnicity” question, and part two is the “race” question. This is the required format:

1. Are you Hispanic or Latino?
 - Yes
 - No
2. Regardless of your answer to the prior question, please check one or more of the following groups in which you consider yourself to be a member:
 - American Indian or Alaska Native
 - Asian
 - Black or African-American
 - Native Hawaiian or Other Pacific Islander
 - White

A person who answers Yes to part one should also answer part two, but that person will be reported to the federal government (Department of Education) as Hispanic/Latino. In other words, a “yes” to the Hispanic/Latino question “trumps” the answers in question 2.

The implementation of this two-question format is required by Fall 2010, and we must report data to the Department of Education as of the 2010-11 academic year using this format. In addition to changing the way we

collect this data going forward, the Department of Education recommends that we re-collect data from current staff and students using the two-question format.

Given that people can now select more than one race, we will be required to report people that do so in a “2 or more races” category. Current reporting does not include such a category. Therefore, we can expect to see a decrease in minority categories as they get subsumed under “2 or more races”. Also, we can expect to see a slight increase in the “Hispanic/Latino” category, since that category trumps all others in part two of the question.

This change has wide-ranging implications. It affects all of our application materials, many of which are managed by outside entities, such as the freshman Common Application. All of the application materials must change to meet the new standards. Also, our information systems, in particular PeopleSoft HR, must change to adapt to a new way of storing data. And reporting tools must adapt to a new algorithm for reporting data to the government.

Keep in mind that these changes in reporting (though not collection) are for the federal government only, and we may choose to report on race and ethnicity for internal purposes differently.

Those most affected by these changes (Registrar, Admissions, VPUE, VPGE, etc.) have met to go over the new regulations, and will continue to discuss the implications of the new data collection and reporting rules. Many questions have arisen as policy makers on campus try to determine how to use the new data—what will “2 or more races” mean? How much of a jump in Hispanic/Latino students or staff can we expect? Do we want to ask stu-

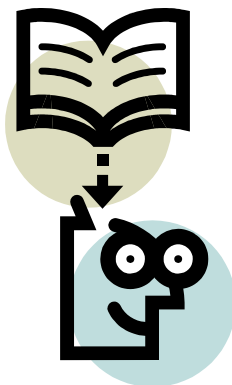
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Mission Statements, cont'd

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faculty take ownership in its development and that it becomes second-nature to faculty members and students in the department. In this way, the mission statement should become the program’s mantra. This includes taking time to revisit the program’s vision and goals during the program review process.

To create an effective mission statement, there are a few essential components. It is important that the mission statement provides a clear description of the program’s purpose and its primary functions. It should identify who the program will serve, and how it will contribute to the development



and career paths of the students participating. Its language should make the program’s vision and goals stand on their own and distinguish the program from other programs, even if the program’s name were removed. In other words, it is crucial to add vision to the mission—the mission statement should be a tool that can be used to push the program forward.

For more information about creating program mission statements and about assessment please visit the new assessment section of the IR&DS website which will go live in February. Or, call Jenny Bergeron (contact info is on page 4) with any questions.

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Changes in IR&DS job duties

Lillian Lee has been serving as a replacement for Missy Damon during Missy's maternity leave. Lillian has done a great job of filling in for Missy, applying her experience and smarts to a number of projects. Thanks, Lillian!

Lillian will now move on to her next challenge. We are happy to report that Lillian will stay on as Anita Craig's replacement at 50% time as of February 23, 2009. Lillian will sit in Room 206 in Building 60 and can be reached at Lillian.lee@stanford.edu and 5-4648.

This also means we'll be saying goodbye to the wonderful Emma Vavra, who has been filling in for Anita these past 3 months. She helped with numerous critical projects and we will miss her!

Moratorium on Surveying the Class of 2012

As has been previously reported in this newsletter, Stanford is undertaking several assessment and evaluation projects in connection with our re-accreditation. These projects involve many studies, but in particular, the Class of 2012 is serving as the basis for data collection around the themes of our re-accreditation— "Away from Campus", "Variations in Educational Environments", and "Fundamental Skills". This class (the current freshmen) have already taken a pre-freshman survey, and the WASC accreditation project will continue to survey this class extensively over the next four years.

The accreditation executive steering committee has determined that because of the extra survey burden being placed on the Class of 2012, no additional surveys should include these students. If you have a pressing need to survey this class, please contact Paddy, Jenny, Lisa, or Rana in IR&DS.

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Race & Ethnicity, cont'd

dents to pick a "primary" race/ethnicity? Do we need to re-ask freshmen for their race/ethnicity once the application process is complete? Will we allow students to "opt out" of answering the question? These and other questions will continue to get our attention as the implementation date approaches. Look for a follow-up article in this newsletter as implementation of the new federal requirements on race and ethnicity proceeds.