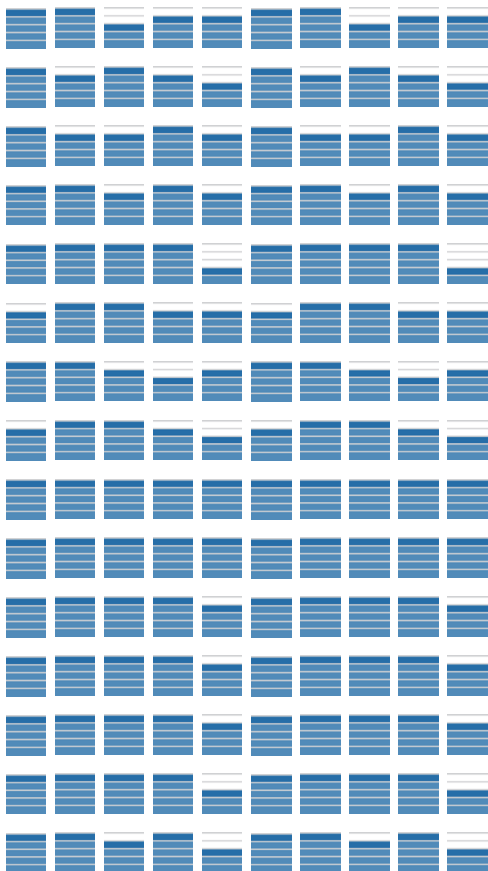


DEFINING INSTITUTIONAL RESEARCH: FINDINGS FROM A NATIONAL STUDY OF IR WORK TASKS

A FOCUS ON SENIOR IR/IE LEADERS

Association for Institutional Research | 2016



Defining Institutional Research: Findings from a National Study of IR Work Tasks

A FOCUS ON SENIOR IR/IE LEADERS

Fred Lillibridge, Randy L. Swing, Darlena Jones, Leah Ewing Ross

Association for Institutional Research | 2016

The Association for Institutional Research (AIR) is engaged in a variety of efforts to document the current state of institutional research. In 2012, the Association initiated a critically important effort to identify the tasks involved in the work of institutional research (IR) across all titles and variations represented in its membership.

This work was led by long-term AIR member and Past President Fred Lillibridge, Emeritus Associate Vice President for Accreditation, Compliance, and Planning at Doña Ana Community College. The questions that guided this inquiry included: What skills and abilities do search committees seek when hiring institutional researchers? What tasks are included in AIR members' work? How much is what institutional researchers do worth?

Phase 1: Identification of IR Tasks

October 2012 – May 2013

A draft typology of institutional research (IR) positions and work tasks was developed through analysis of job descriptions and position announcements contributed by AIR members. A random sample of AIR members (245) was asked to submit job descriptions and position announcements for review. A total of 43 jobs were analyzed.

A total of 1,351 tasks were extracted from the job descriptions and position announcements provided to AIR. Collectively they represent a wide view of institutional research as a key educational field grounded in data and decisions, and not all elements identified apply to every IR position. The tasks were sorted into 18 domains. The item numbers listed with each domain title reflects the distribution of the tasks.

Ability 13 tasks	Accountability 66 tasks	Accreditation 84 tasks	Analyze 190 tasks	Assessment 154 tasks	Collaboration 91 tasks
Grants 28 tasks	Information Technology 142 tasks	Institutional Review Board 9 tasks	Integrity 49 tasks	IPEDS 8 tasks	Planning 88 tasks
Presentations 11 tasks	Priority Setting 14 tasks	Reporting 82 tasks	Research 155 tasks	Supervision 142 tasks	Survey 25 tasks

While these tasks likely measure the majority of the work of IR, this collection of tasks may not completely reflect what is actually entailed in the work of IR or what is needed in the future—that is, IR professionals are engaged in work that is broader than IR.

Phase 2: Survey of AIR Members

June 2013 – January 2014

After the tasks were sorted into 18 domains, the list was refined to 1,451 tasks. The language used in the job descriptions and position announcements analyzed in the first phase of the study was maintained and carried over to the refined task list. Unique identifiers were assigned to each task to create a data key for future management and analysis.

The final list of tasks was shared with AIR members in a survey format. Respondents were asked to reflect on the relevancy of the tasks based on their current job duties. The question posed of respondents was: *To what degree are the following tasks part of your responsibilities?* A 5-point scale was used to rate each task: (1) not at all, (2) low, (3) moderate, (4) high, and (5) very high, with an additional option to indicate “don’t know.”

In order to ensure a manageable survey size, the 1,451 tasks were randomly divided into 15 surveys (approximately 95 tasks per survey). All AIR members (3,905 at that time) were randomly assigned to the 15 surveys. The surveys launched in December 2013 using Skyfactor’s (formerly EBI) online survey system, and closed in January 2014. The response rate was 34% (1,325 AIR members). The respondents’ sector distribution closely resembled the overall AIR membership.

Some AIR members are not directly involved in day-to-day IR functions, but have related interests in the field. A screening question directed those respondents to a secondary survey about the field of IR. The question posed was: *Consider the role of a director-level IR position at a college/university with an IR office of 2 to 3 people. To what degree do you think each of the following tasks would be part of the director’s responsibilities?* A 5-point scale was used to rate each task: (1) not at all, (2) low, (3) moderate, (4) high, and (5) very high, with an additional option to indicate “don’t know”.

The resulting data provide rich opportunities for exploration of the work of IR. The results are available to AIR members, and several researchers are using the data to inform scholarly inquiries about the field. Email AIR (air@airweb.org) to request access to the data.

Phase 3: Reduction of IR Tasks and Analyses

February 2014 – August 2014

Initial analyses of the survey data highlighted that many of the 1,451 tasks could be grouped together because large numbers of respondents reported similar levels of responsibility. For example, the tasks “analyzes data for strategic planning” and “reviews institutional research and analytical projects for the strategic planning process” were combined to create the task “analyzes data to support strategic planning”.

This process resulted in a reduced list of 765 tasks.

An overview of the project was presented at the 2014 AIR Forum in Orlando. The wide variety of tasks – and their relevance – reflect the myriad tasks affiliated with the work of IR. Rather than attempt to share an incredibly large set of information at one time, the conference session focused on the tasks relevant to the work of senior IR/IE officers. The intent of the high-level review of one segment of the survey data was to provide an example of the rich information available in this data set.

Focus on Senior IR Leaders

Table 1 shows the distribution of the 1,325 survey respondents by their primary roles on campus. More than 50% of respondents identified as senior institutional research or institutional effectiveness (IR/IE) officers. To reduce complexity, our initial analyses focused on those senior IR/IE officers.

Table 1. Primary Role on Campus	# Responses	% of Total
IR/IE: Senior IR/IE Officer	713	54%
IR/IE: Associate/Assistant IR/IE Officer	197	15%
IR/IE: Staff – Analyst, Statistician, Data Manager, etc.	316	24%
Senior Assessment Officer	63	5%
Assessment Staff	36	2%

Survey respondents identified the number of full-time equivalent (FTE) employees who report to them. Table 2 shows the results filtered by senior IR/IE officers (708 of the 713 respondents who identified as senior IR/IE officers answered this question). Of those individuals, 71% have 7 or more FTE employees reporting to them.

Table 2. Number of FTE Employees Reporting to Senior IR/IE Officer	# Responses	% of Total
None	34	5%
1 to 3 FTE	35	5%
4 to 6 FTE	137	19%
7 to 9 FTE	327	46%
10 or more FTE	175	25%

Analyses of Senior IR/IE Officers' Tasks

We filtered the survey results by senior IR/IE officer and disaggregated by the number of FTE employees reporting to the senior IR/IE officer. Next, we assigned the tasks to one of five categories, as shown in Table 3.

Table 3. Number of Tasks Performed to High Degree by Senior IR/IE Officers	# Responses	% of Total
Most/All Senior IR/IE Officers	221	29%
Some Senior IR/IE Officers	353	46%
Few Senior IR/IE Officers	92	12%
Senior IR/IE Officers with Less Than 4 FTE Employees Reporting to Them	59	8%
Senior IR/IE Officers with More than 4 FTE Employees Reporting to Them	40	5%

Examples of tasks that most/all senior IR/IE officers perform to a high degree:

- Maintain current knowledge in the field of institutional research
- Direct the response to information requests from key internal constituents
- Ensure appropriate data are available for institutional decision making
- Align resources to meet office/institutional priorities

Examples of tasks that some senior IR/IE officers perform to a high degree:

- Analyze applicant trends
- Develop program evaluation plans
- Provide information to program directors for their annual reports to the president's cabinet
- Ensure effective use of software applications, systems, or programs

Examples of tasks that few senior IR/IE officers perform to a high degree:

- Analyze institutional budget data
- Communicate institutional student learning/achievement strategies
- Conduct assessments of students' parents/families
- Prepare reports of results from staff orientation surveys

Examples of tasks more likely to be performed to a high degree by senior IR/IE officers with four or fewer FTE employees reporting to them (compared to those with more employees):

- Implement campus data warehouse
- Engage in executive and management functions of the institution
- Represent the institution on various state/federal data policy groups
- Identify issues that need attention regarding compliance with accreditation standards

Examples of tasks more likely to be performed to a high degree by senior IR/IE officers with more than four FTE employees reporting to them (compared to those with fewer employees):

- Collaborate with academic departments to implement continuous and systematic processes for institutional assessment
- Oversee reporting of required faculty and staff information to the state
- Analyze data for regional accreditation
- Learn new statistical methods

Summary

The primary goal of this project was to produce an inventory of tasks involved in the work of institutional research (IR) across all titles and variations represented in the AIR membership. The tasks included in this report were submitted by AIR members. The subsequent pages of this report reflect findings about the degree to which senior IR/IE officers perform the tasks examined in this study.







Acknowledgment

AIR thanks Skyfactor (formerly EBI) for technical support in the data collection for this project.

Reading the Task Charts

The tasks listed on the following pages are grouped by major categories of work (e.g., accreditation, reporting). Within each major category, the tasks are clustered by the extent to which senior IR/IE officers perform that work to a high degree. The information has been disaggregated by the number of full-time equivalent (FTE) employees reporting to the senior IR/IE officer. (The column to the far left represents 0 FTE employees, and the column to the far right represents 10 or more FTE employees reporting to the senior IR/IE officer.)

Chart Key

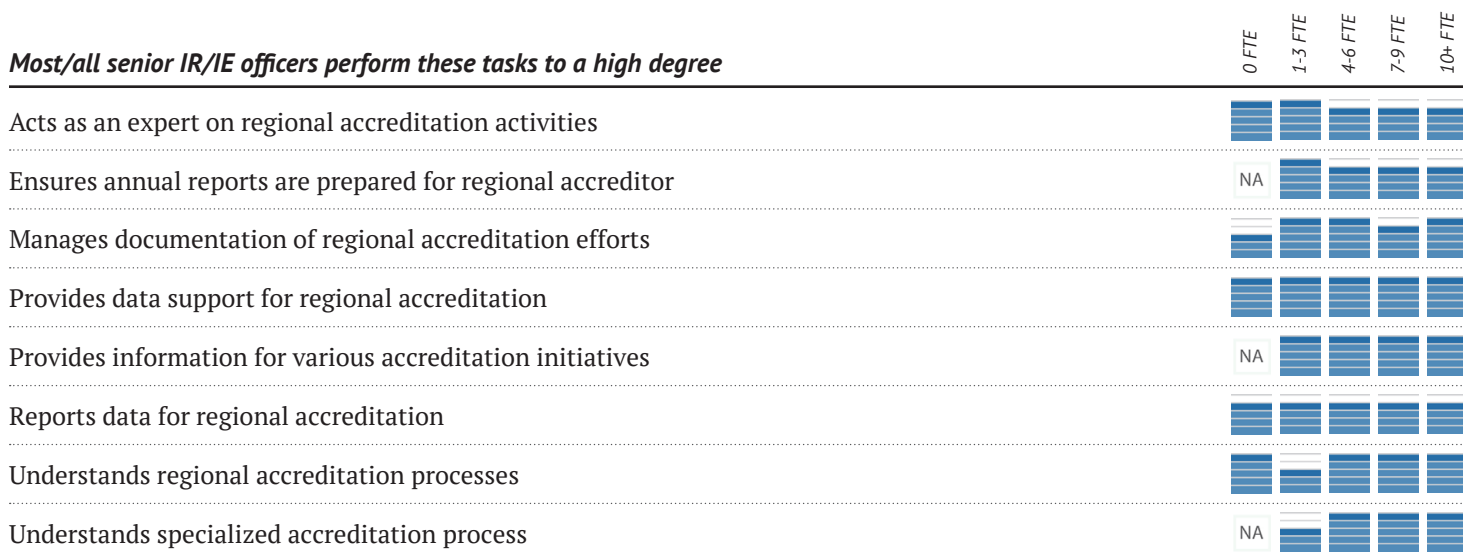
-  Less than 20% perform task to a high degree
-  20% to 39% perform task to a high degree
-  40% to 59% perform task to a high degree
-  60% to 79% perform task to a high degree
-  80% or more perform task to a high degree
-  NA cells represent missing data

Institutional Research Tasks – Senior IR/IE Officers

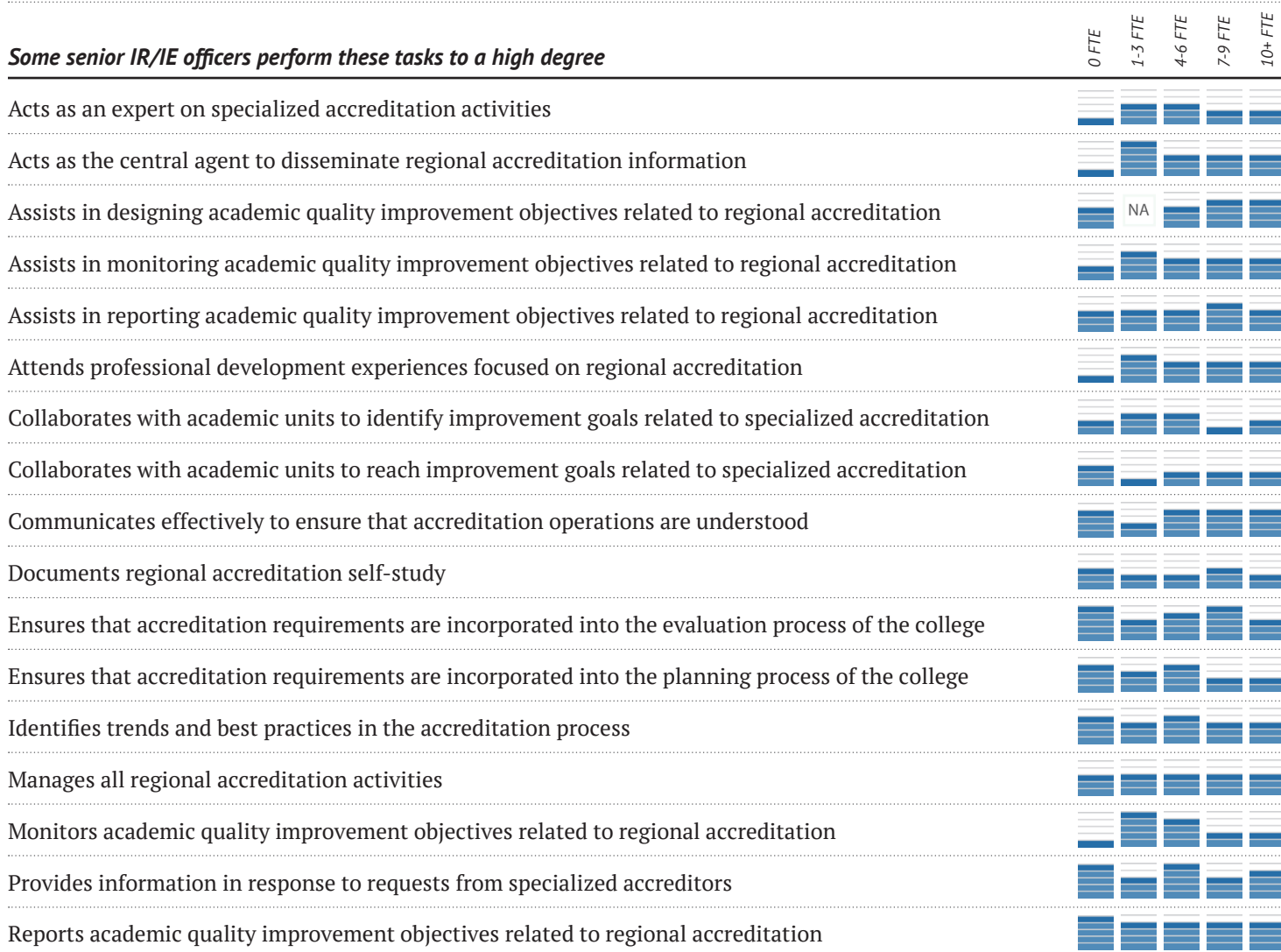
To what degree are the following tasks part of your responsibilities?

ACCREDITATION

Most/all senior IR/IE officers perform these tasks to a high degree



Some senior IR/IE officers perform these tasks to a high degree



Institutional Research Tasks – Senior IR/IE Officers

To what degree are the following tasks part of your responsibilities?

ACCREDITATION CONT.

Serves as a contact for accrediting agencies' staff



Supports regional accreditation process



Few senior IR/IE officers perform these tasks to a high degree

Collects information about specialized accreditations



Gathers data in support of community needs assessments



Notifies regional accrediting agencies of changes



Serves as accreditation liaison for institution



Serves as an accreditation evaluator/reviewer



Tasks performed to a high degree by senior IR/IE officers in offices with fewer FTE

Communicates issues that need attention regarding compliance with accreditation standards



Disseminates information about specialized accreditations



Identifies issues that need attention regarding compliance with accreditation standards

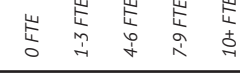


Provides support for specialized accreditation



Tasks performed to a high degree by senior IR/IE officers in offices with moderate/high FTE

Analyzes data for regional accreditation



Completes reports for specialized accreditation



Designs academic quality improvement objectives related to regional accreditation



Works to improve the accreditation process



ASSESSMENT

Most/all senior IR/IE officers perform these tasks to a high degree

Analyzes student perception data



Fosters the value of the integration of institutional research and assessment



Interprets survey results



Supports institutional effectiveness activities

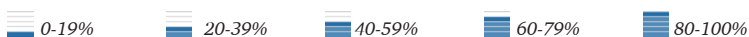


Institutional Research Tasks – Senior IR/IE Officers

To what degree are the following tasks part of your responsibilities?

ASSESSMENT CONT.

Some senior IR/IE officers perform these tasks to a high degree



Institutional Research Tasks – Senior IR/IE Officers

To what degree are the following tasks part of your responsibilities?

ASSESSMENT CONT.



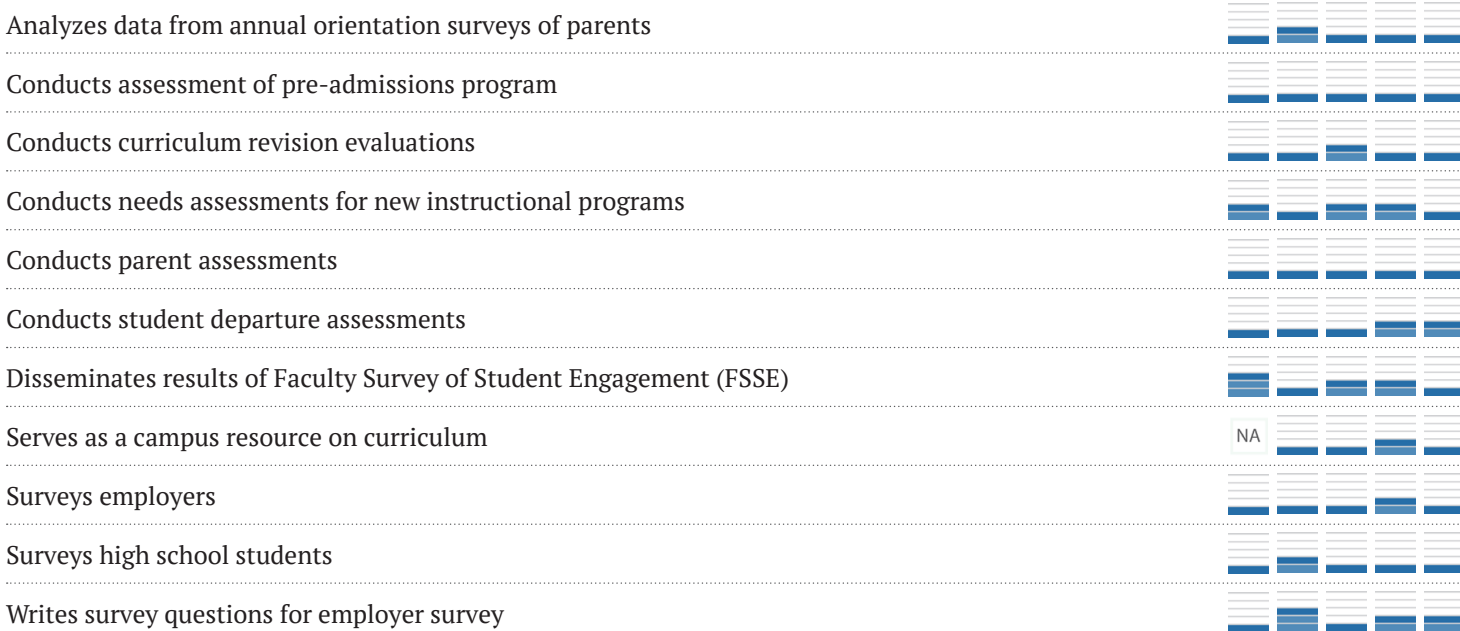
0-19% 20-39% 40-59% 60-79% 80-100%

Institutional Research Tasks – Senior IR/IE Officers

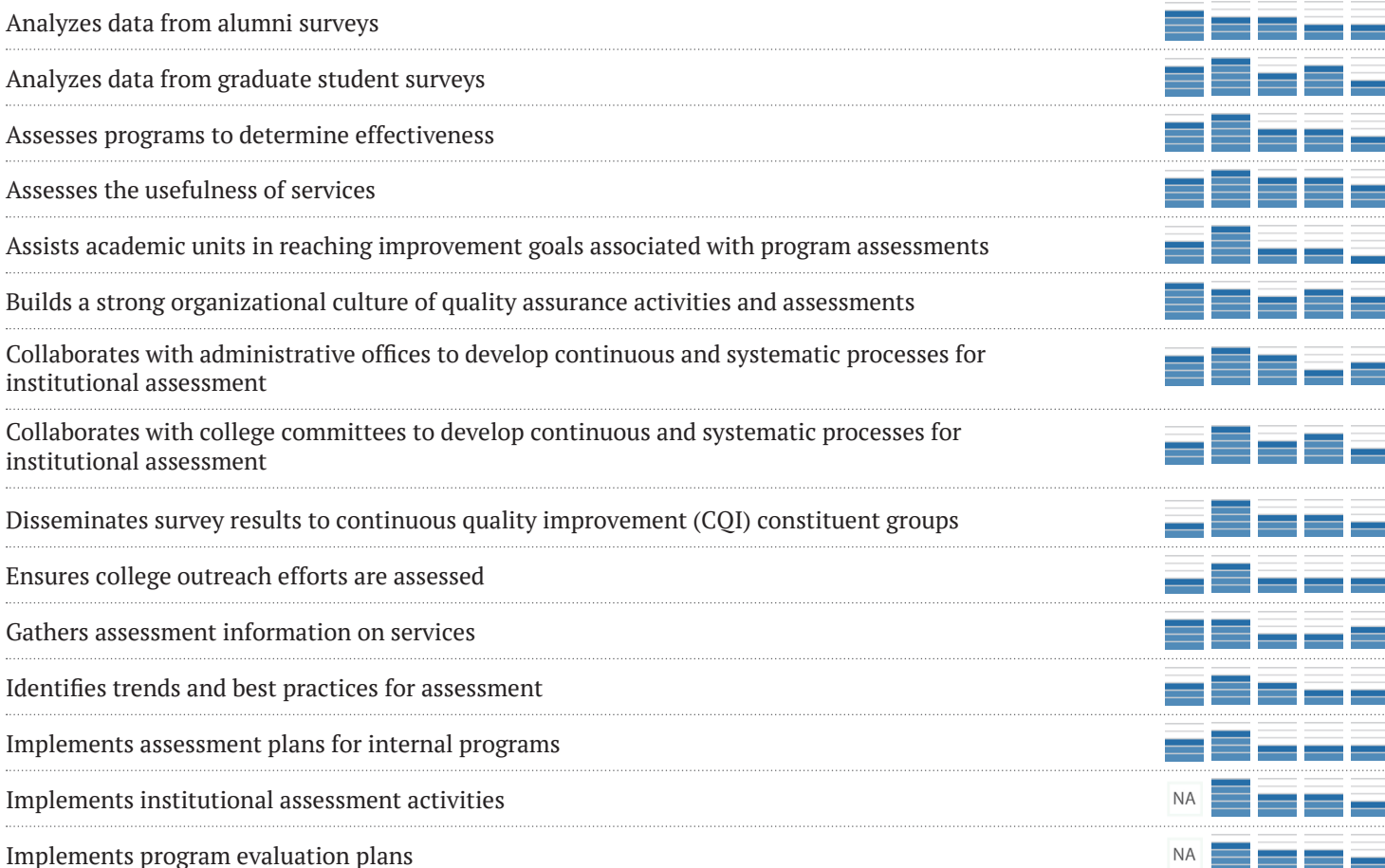
To what degree are the following tasks part of your responsibilities?

ASSESSMENT CONT.

Few senior IR/IE officers perform these tasks to a high degree



Tasks performed to a high degree by senior IR/IE officers in offices with fewer FTE

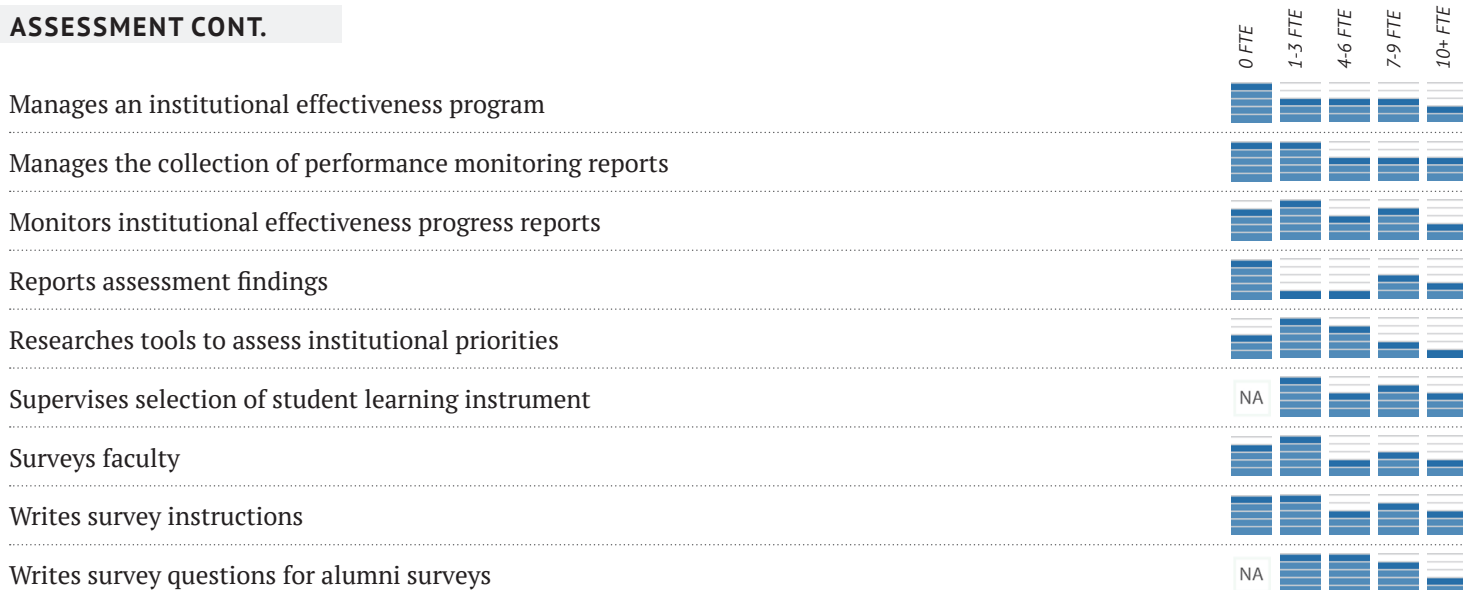


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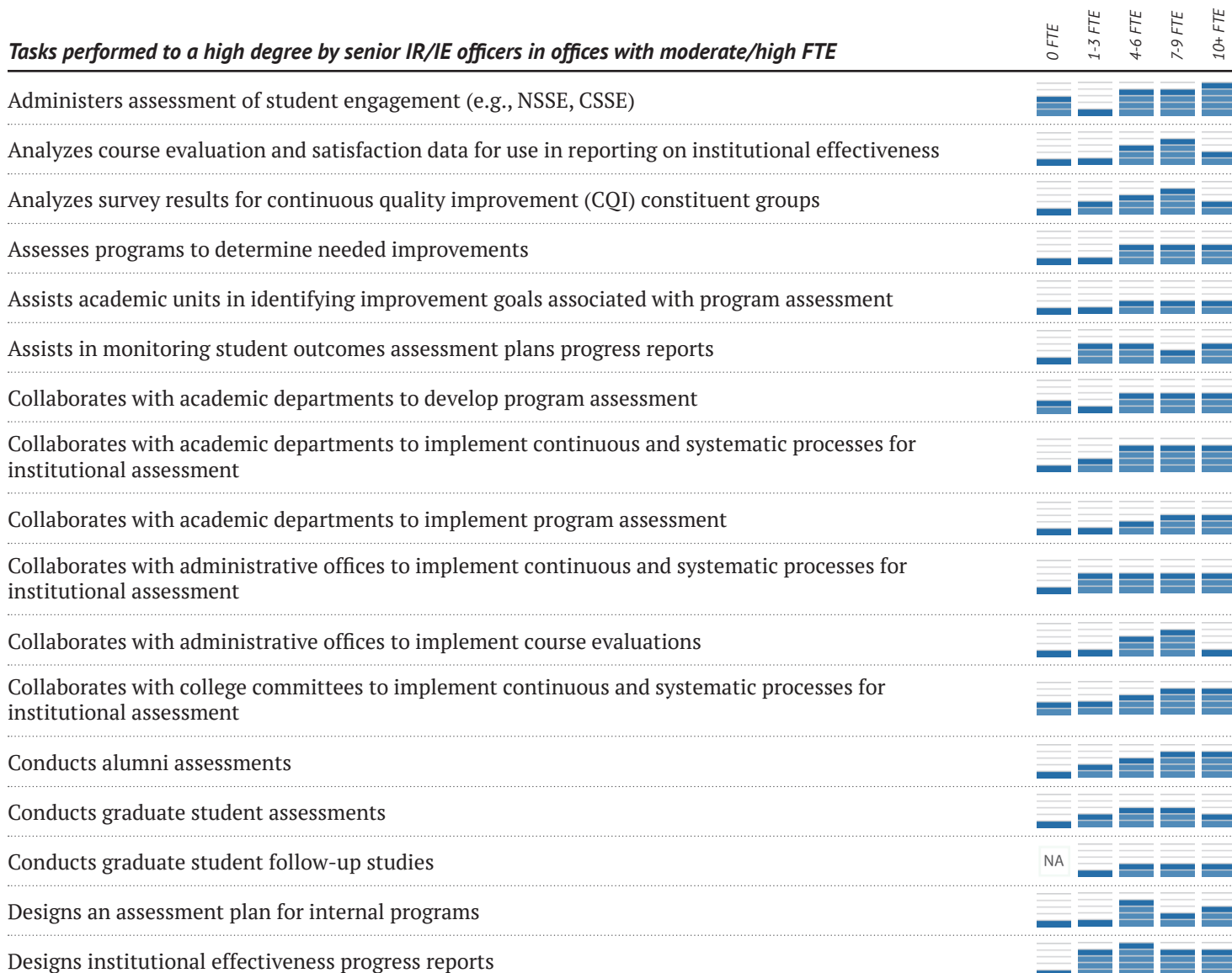
Institutional Research Tasks – Senior IR/IE Officers

To what degree are the following tasks part of your responsibilities?

ASSESSMENT CONT.



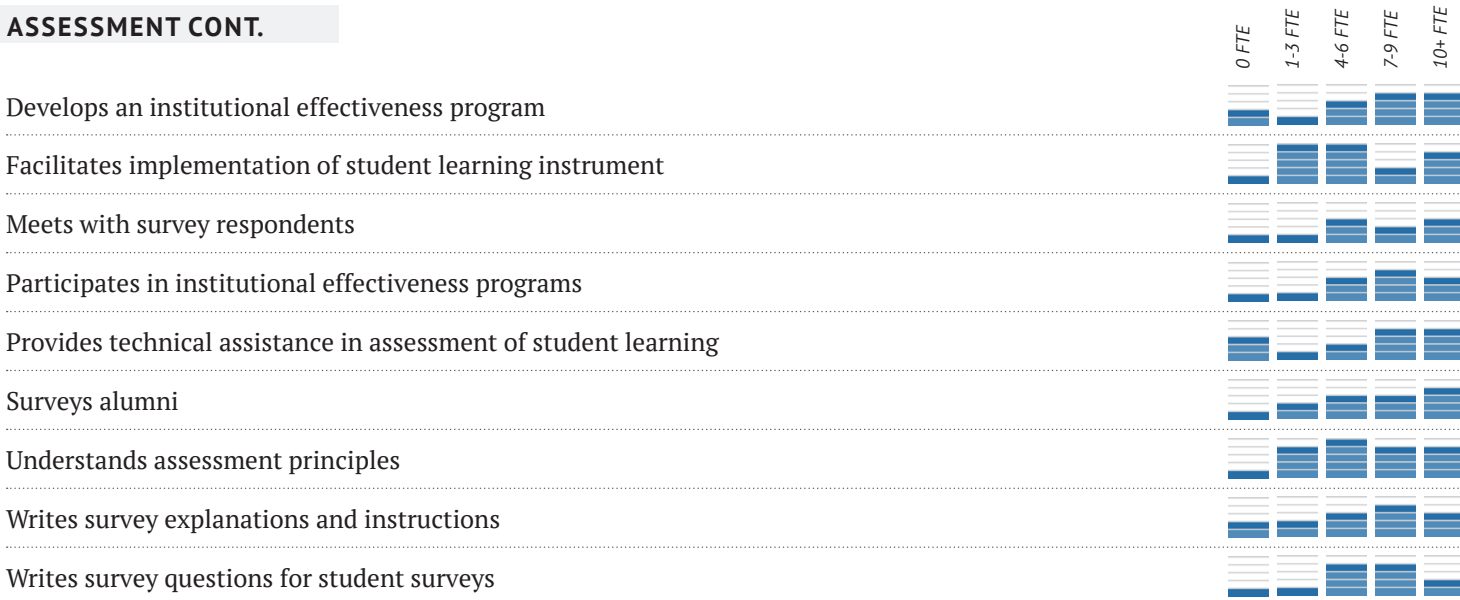
Tasks performed to a high degree by senior IR/IE officers in offices with moderate/high FTE



Institutional Research Tasks – Senior IR/IE Officers

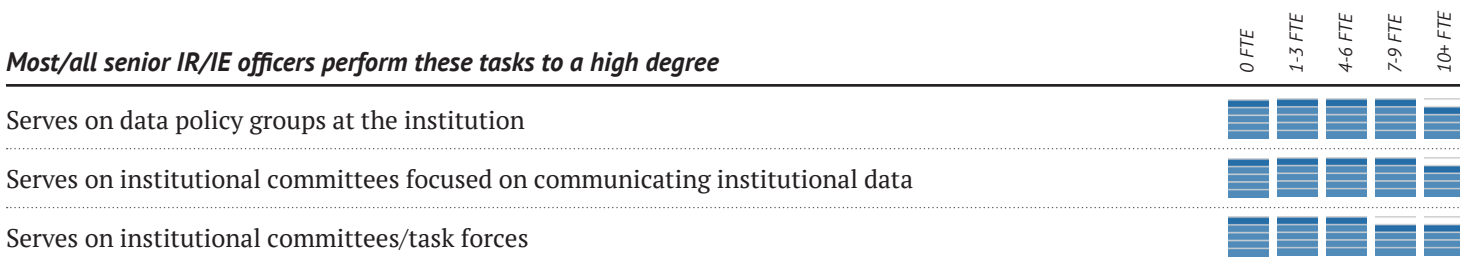
To what degree are the following tasks part of your responsibilities?

ASSESSMENT CONT.



COMMITTEE WORK

Most/all senior IR/IE officers perform these tasks to a high degree



Some senior IR/IE officers perform these tasks to a high degree

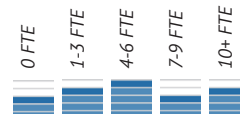


Institutional Research Tasks – Senior IR/IE Officers

To what degree are the following tasks part of your responsibilities?

COMMITTEE WORK CONT.

Serves on institution’s strategic planning committee/task force



Serves on institution’s technology teams

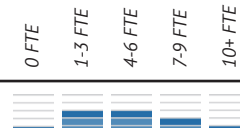


Serves on committees focused on assessment



Few senior IR/IE officers perform these tasks to a high degree

Leads institutional committees focused on academic policies



Serves on the president’s cabinet/council



Tasks performed to a high degree by senior IR/IE officers in offices with fewer FTE

Represents the institution on various state/federal data policy groups



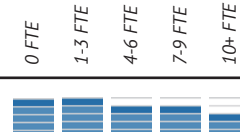
Serves on committees focused on the institutional budget



DATA INTEGRITY

Most/all senior IR/IE officers perform these tasks to a high degree

Acts as a consultant to campus departments/colleagues on assessment metrics



Archives historical institutional data



Collaborates with campus colleagues to ensure campus data are integrated



Collaborates with campus offices to ensure data are accessible



Collaborates with campus offices to ensure data are consistent



Collaborates with campus offices to ensure data integrity



Complies with professional data retention practices



Coordinates institutional data



Documents information resources



Ensures accurate data definitions



Ensures archival of historical institutional data



Ensures campus data are integrated



Ensures data are consistent



Ensures data integrity



Ensures institutional data are accessible



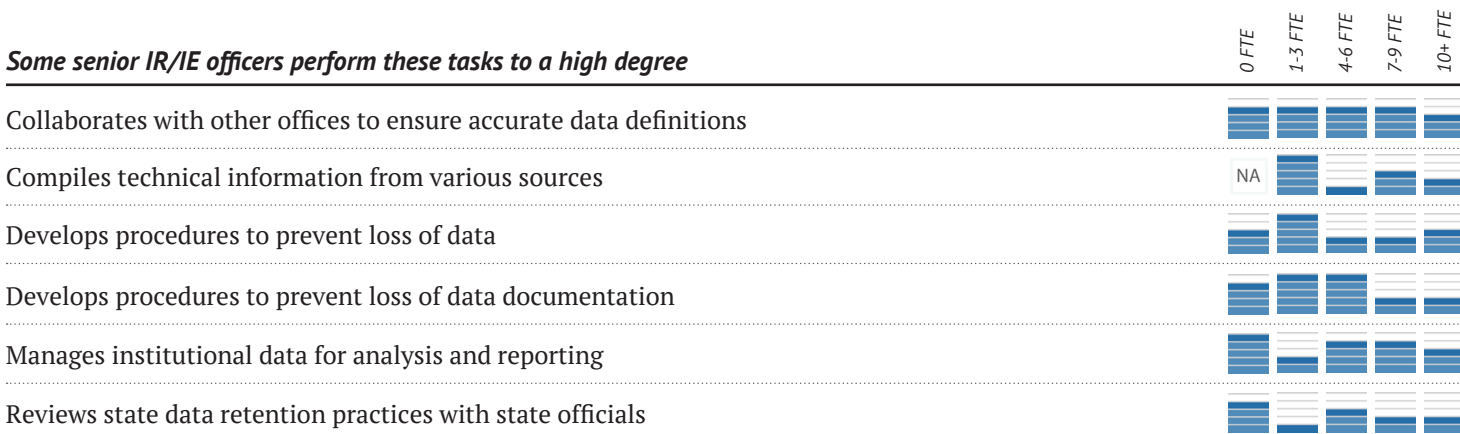
Institutional Research Tasks – Senior IR/IE Officers

To what degree are the following tasks part of your responsibilities?

DATA INTEGRITY CONT.

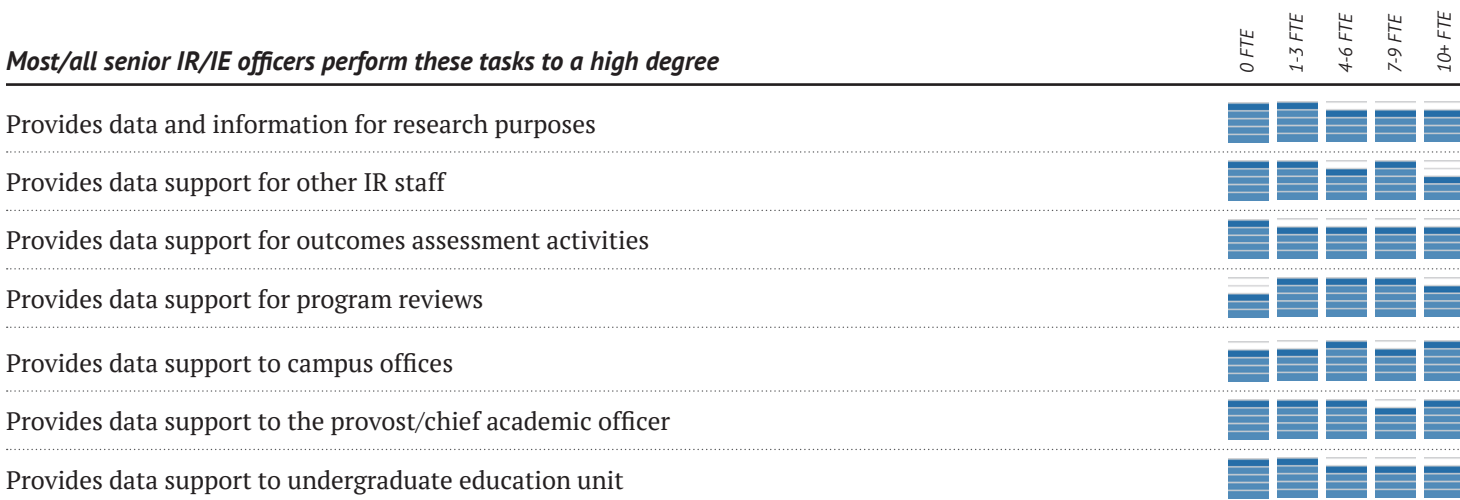


Some senior IR/IE officers perform these tasks to a high degree



DATA SUPPORT

Most/all senior IR/IE officers perform these tasks to a high degree



Institutional Research Tasks – Senior IR/IE Officers

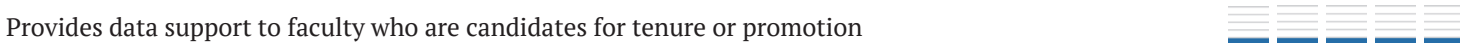
To what degree are the following tasks part of your responsibilities?

DATA SUPPORT CONT.

Some senior IR/IE officers perform these tasks to a high degree



Few senior IR/IE officers perform these tasks to a high degree



EDUCATOR

Most/all senior IR/IE officers perform these tasks to a high degree



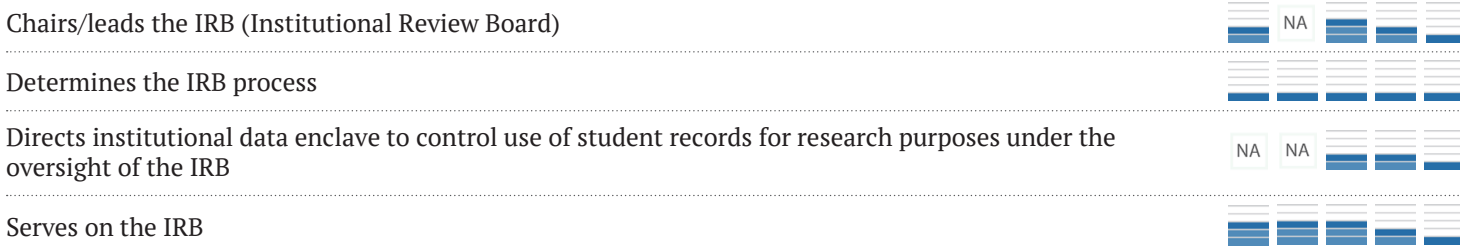
Some senior IR/IE officers perform these tasks to a high degree



Few senior IR/IE officers perform these tasks to a high degree



INSTITUTIONAL REVIEW BOARD

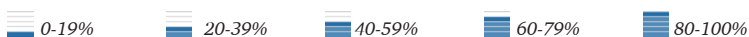


Institutional Research Tasks – Senior IR/IE Officers

To what degree are the following tasks part of your responsibilities?

MANAGEMENT

Most/all senior IR/IE officers perform these tasks to a high degree

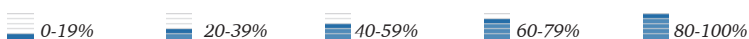
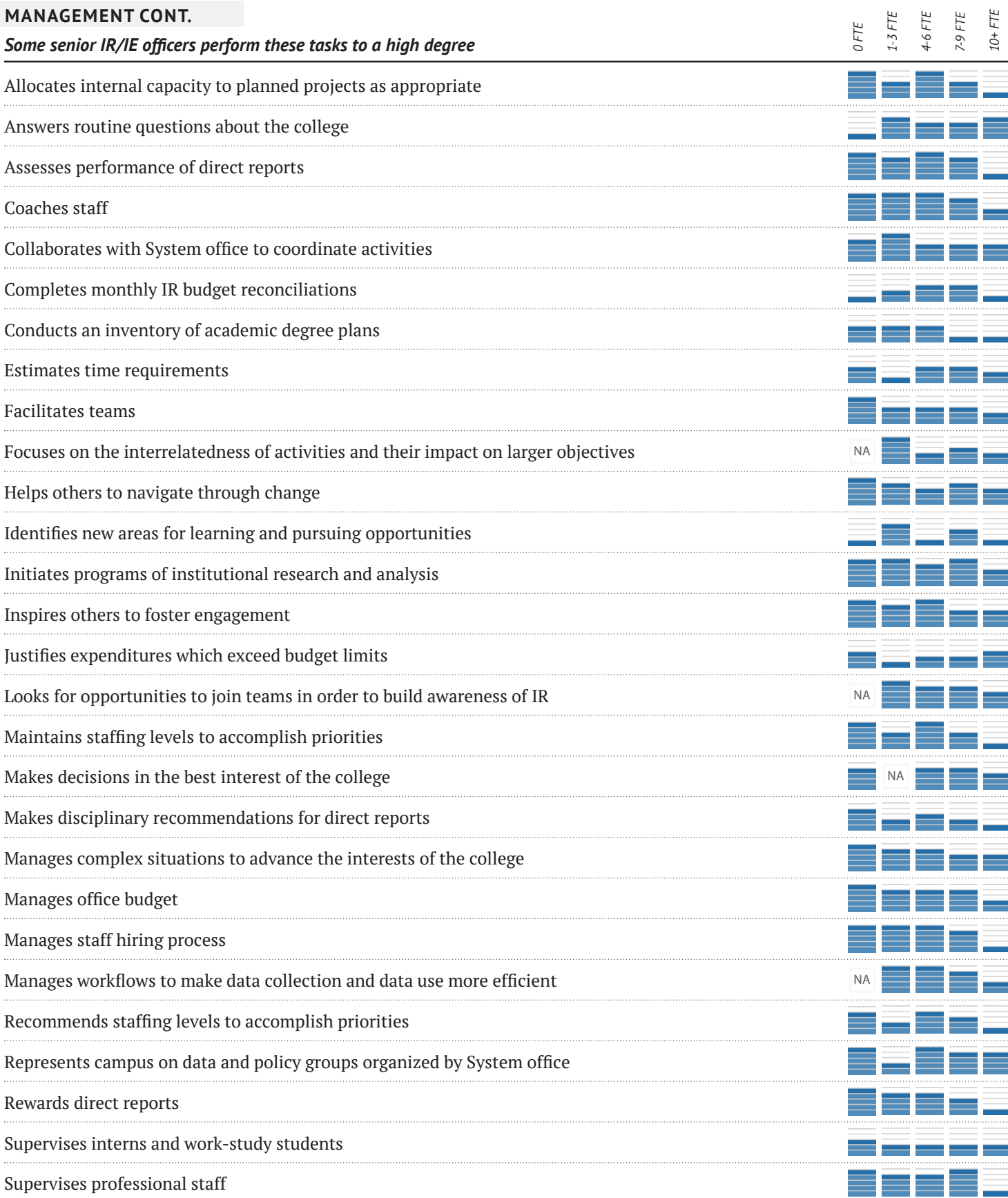


Institutional Research Tasks – Senior IR/IE Officers

To what degree are the following tasks part of your responsibilities?

MANAGEMENT CONT.

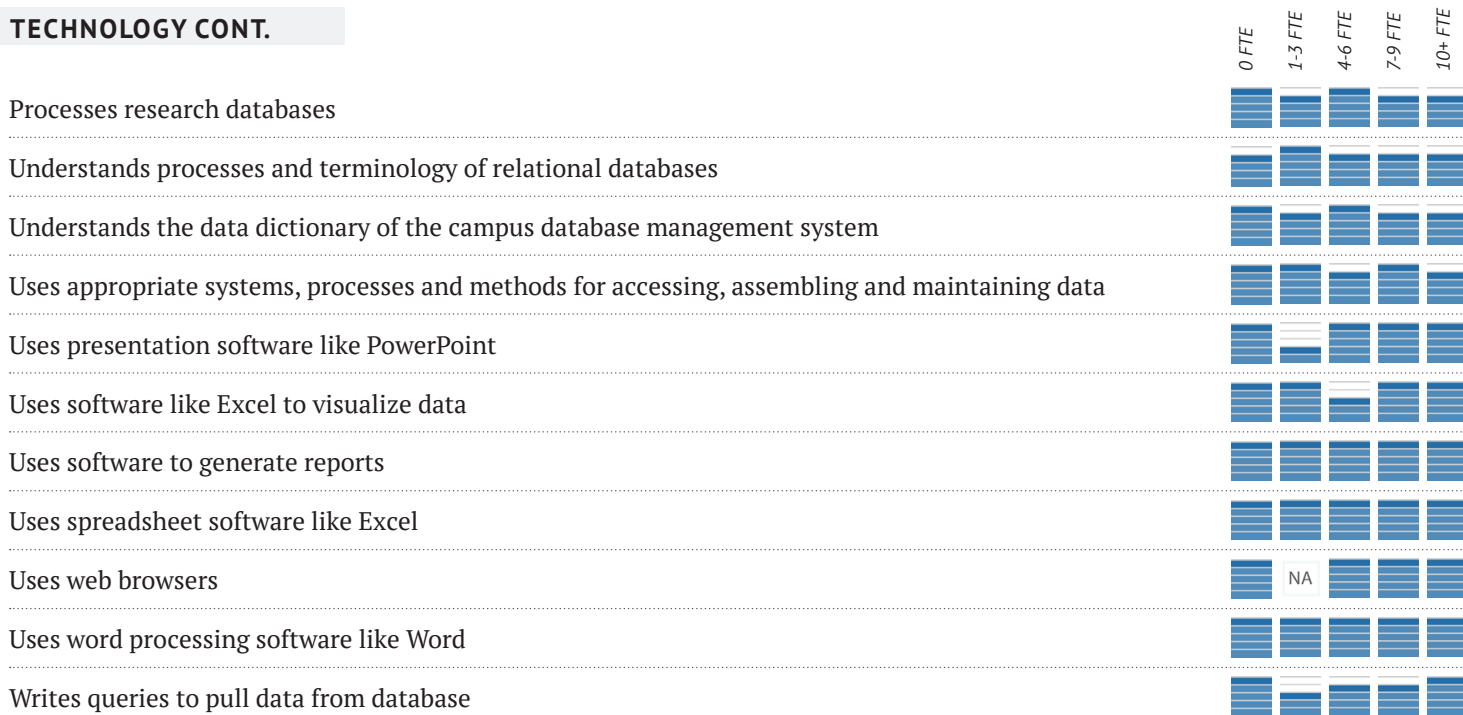
Some senior IR/IE officers perform these tasks to a high degree



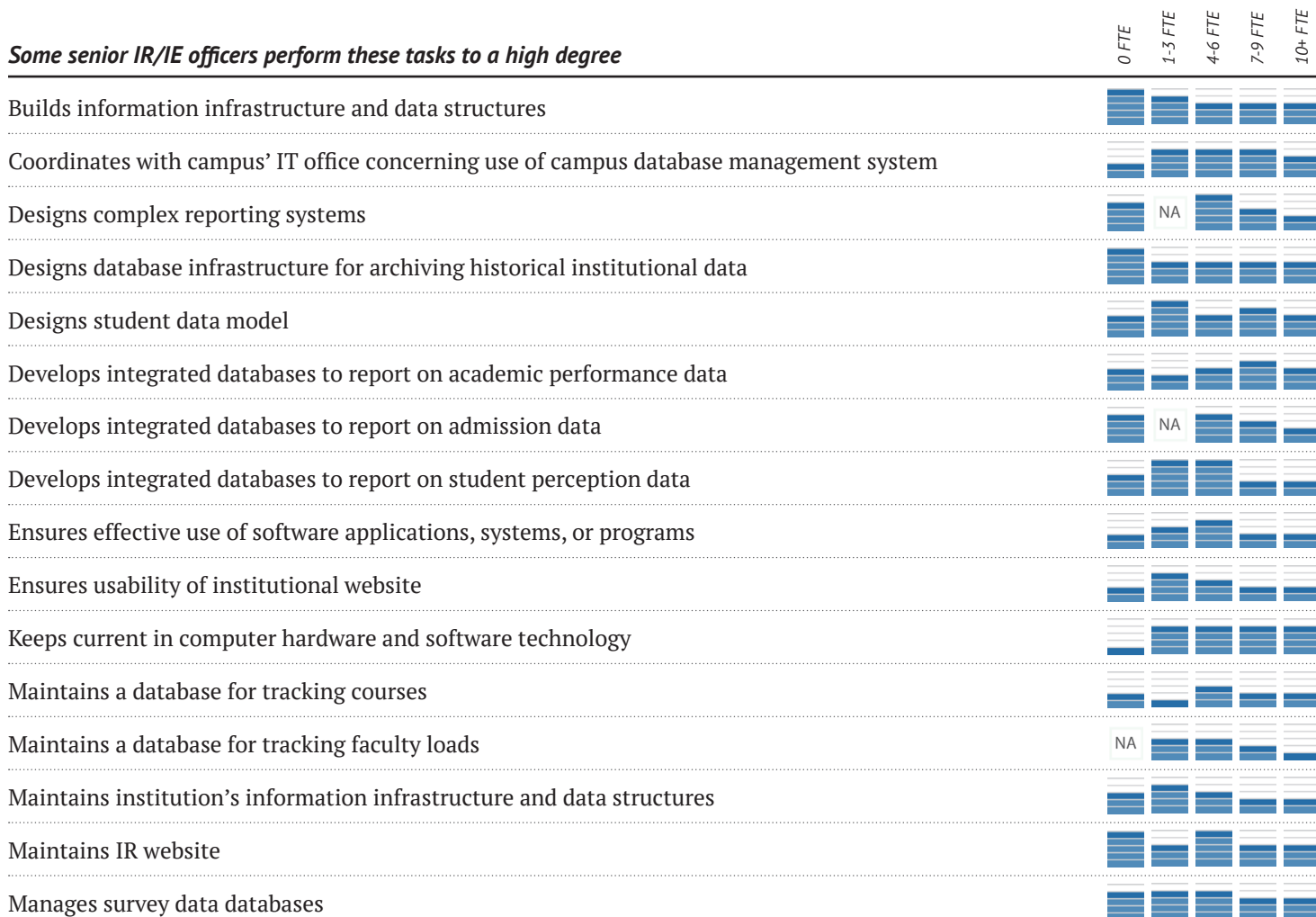
Institutional Research Tasks – Senior IR/IE Officers

To what degree are the following tasks part of your responsibilities?

TECHNOLOGY CONT.



Some senior IR/IE officers perform these tasks to a high degree

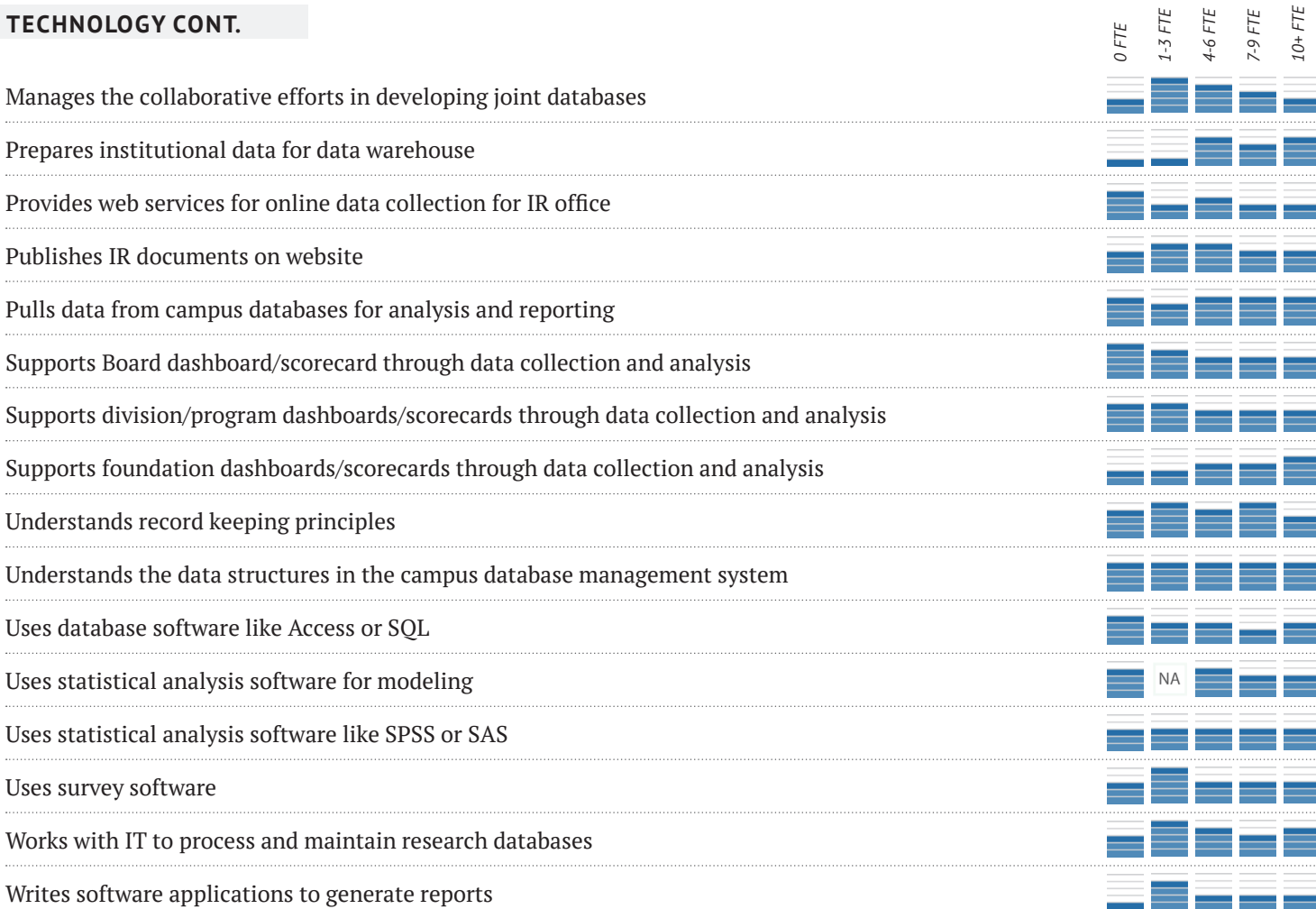


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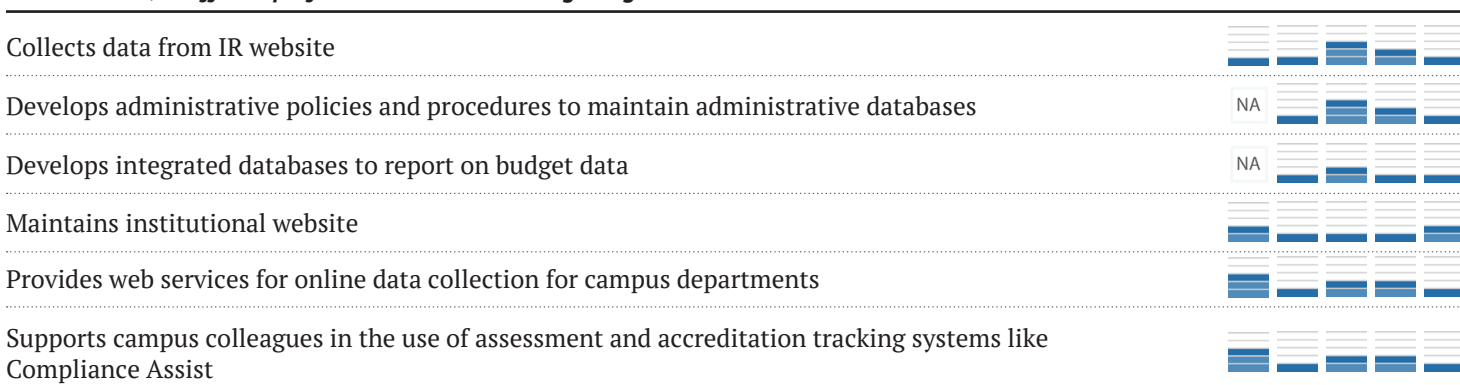
Institutional Research Tasks – Senior IR/IE Officers

To what degree are the following tasks part of your responsibilities?

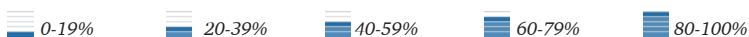
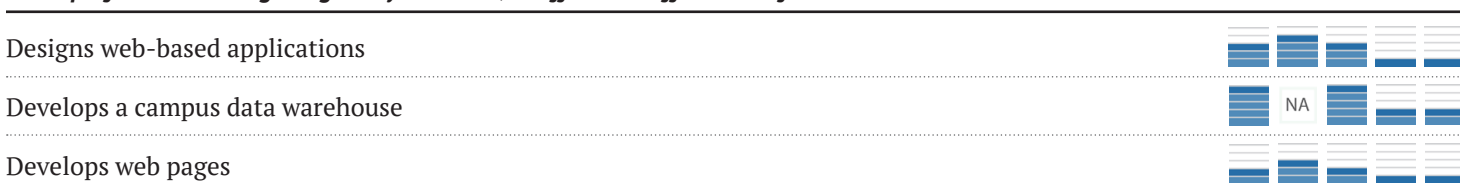
TECHNOLOGY CONT.



Few senior IR/IE officers perform these tasks to a high degree



Tasks performed to a high degree by senior IR/IE officers in offices with fewer FTE



Institutional Research Tasks – Senior IR/IE Officers

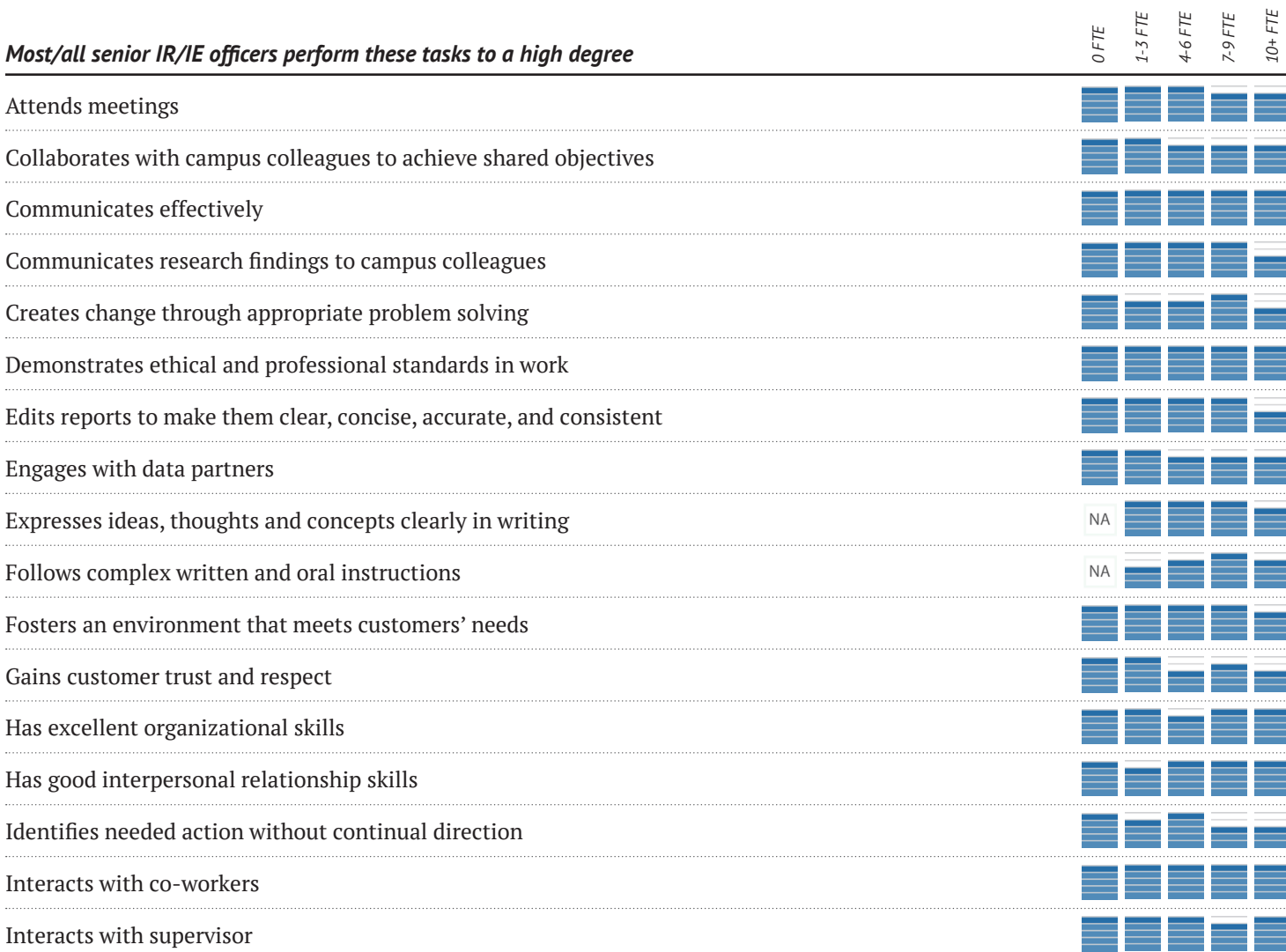
To what degree are the following tasks part of your responsibilities?

TECHNOLOGY CONT.



PERSONAL ATTRIBUTES AND WORK

Most/all senior IR/IE officers perform these tasks to a high degree



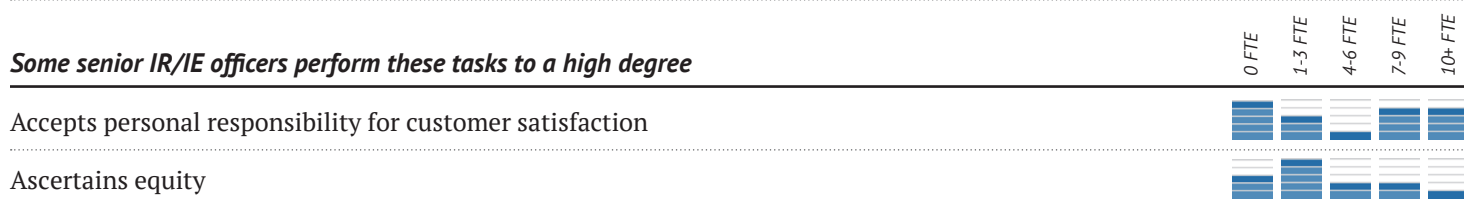
Institutional Research Tasks – Senior IR/IE Officers

To what degree are the following tasks part of your responsibilities?

PERSONAL ATTRIBUTES AND WORK CONT.



Some senior IR/IE officers perform these tasks to a high degree



Institutional Research Tasks – Senior IR/IE Officers

To what degree are the following tasks part of your responsibilities?

PERSONAL ATTRIBUTES AND WORK CONT.



Few senior IR/IE officers perform these tasks to a high degree

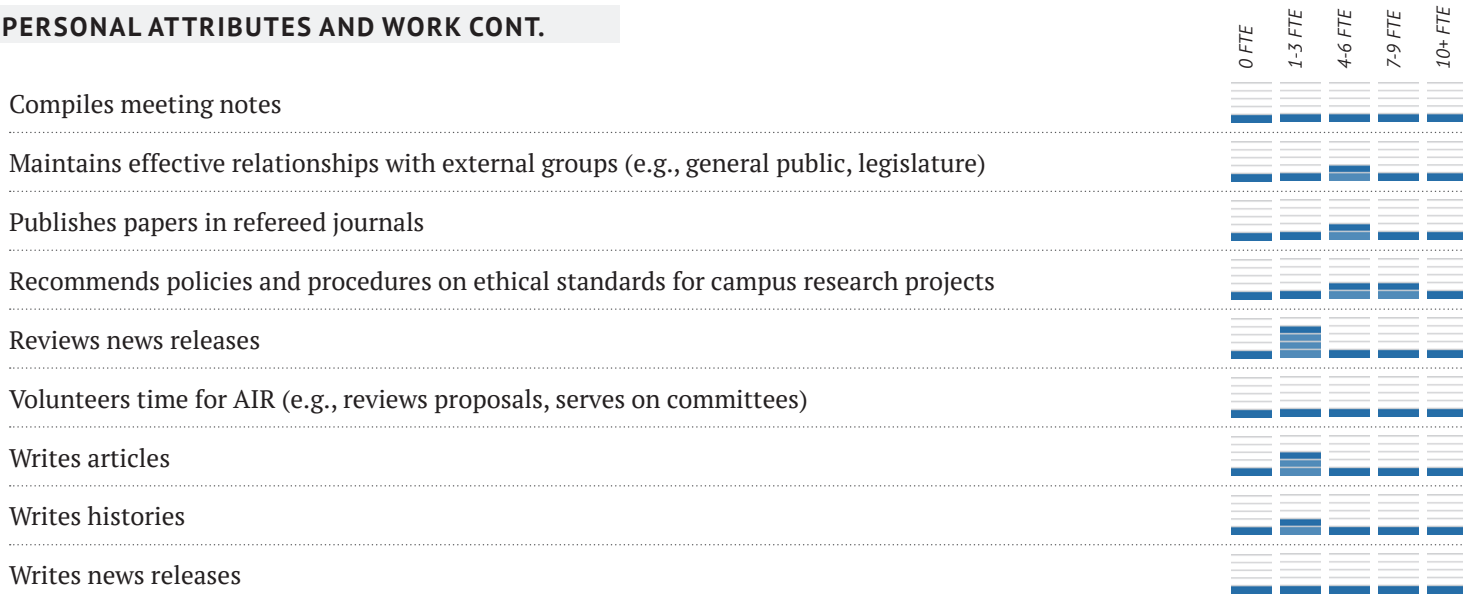


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Institutional Research Tasks – Senior IR/IE Officers

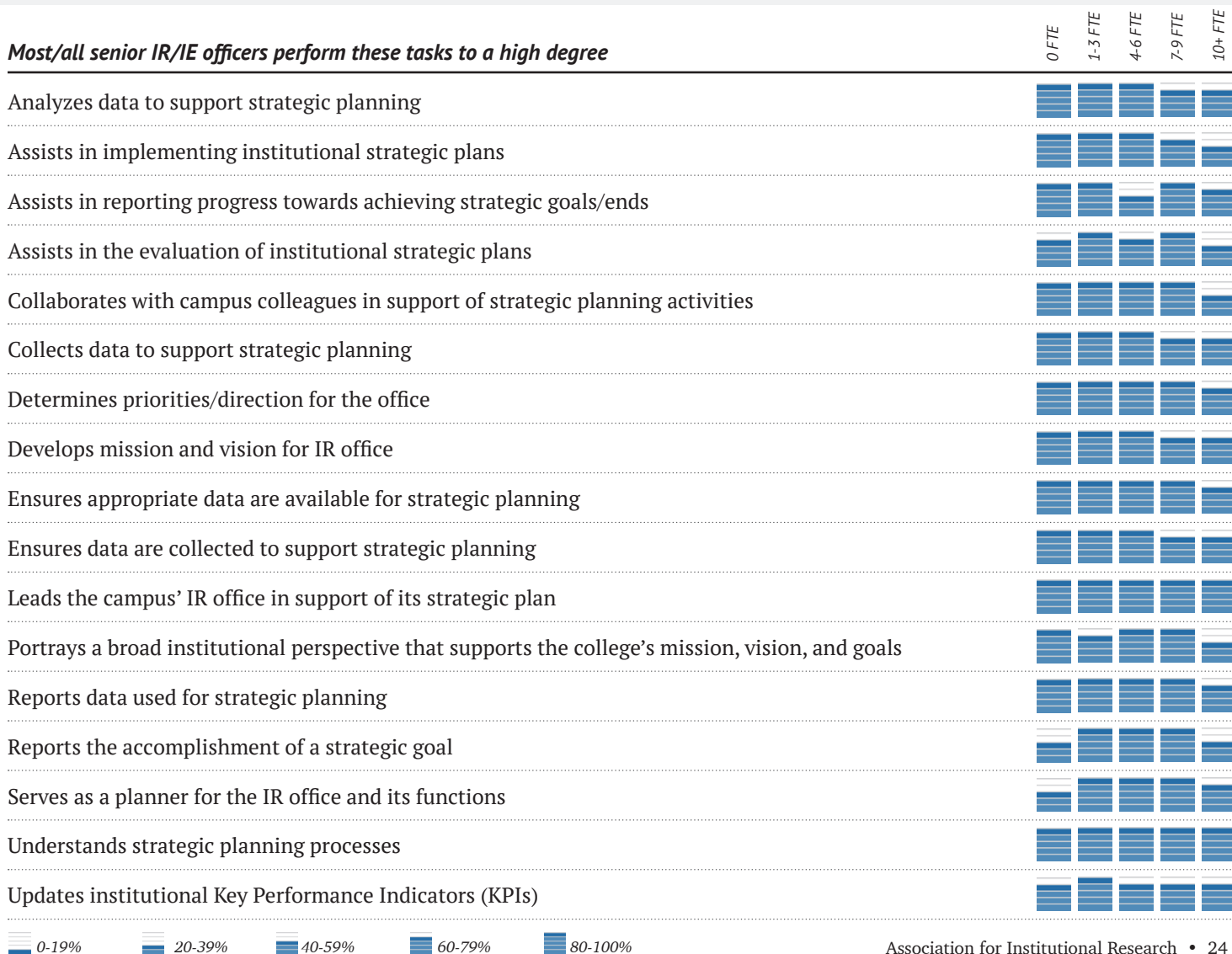
To what degree are the following tasks part of your responsibilities?

PERSONAL ATTRIBUTES AND WORK CONT.



PLANNING

Most/all senior IR/IE officers perform these tasks to a high degree

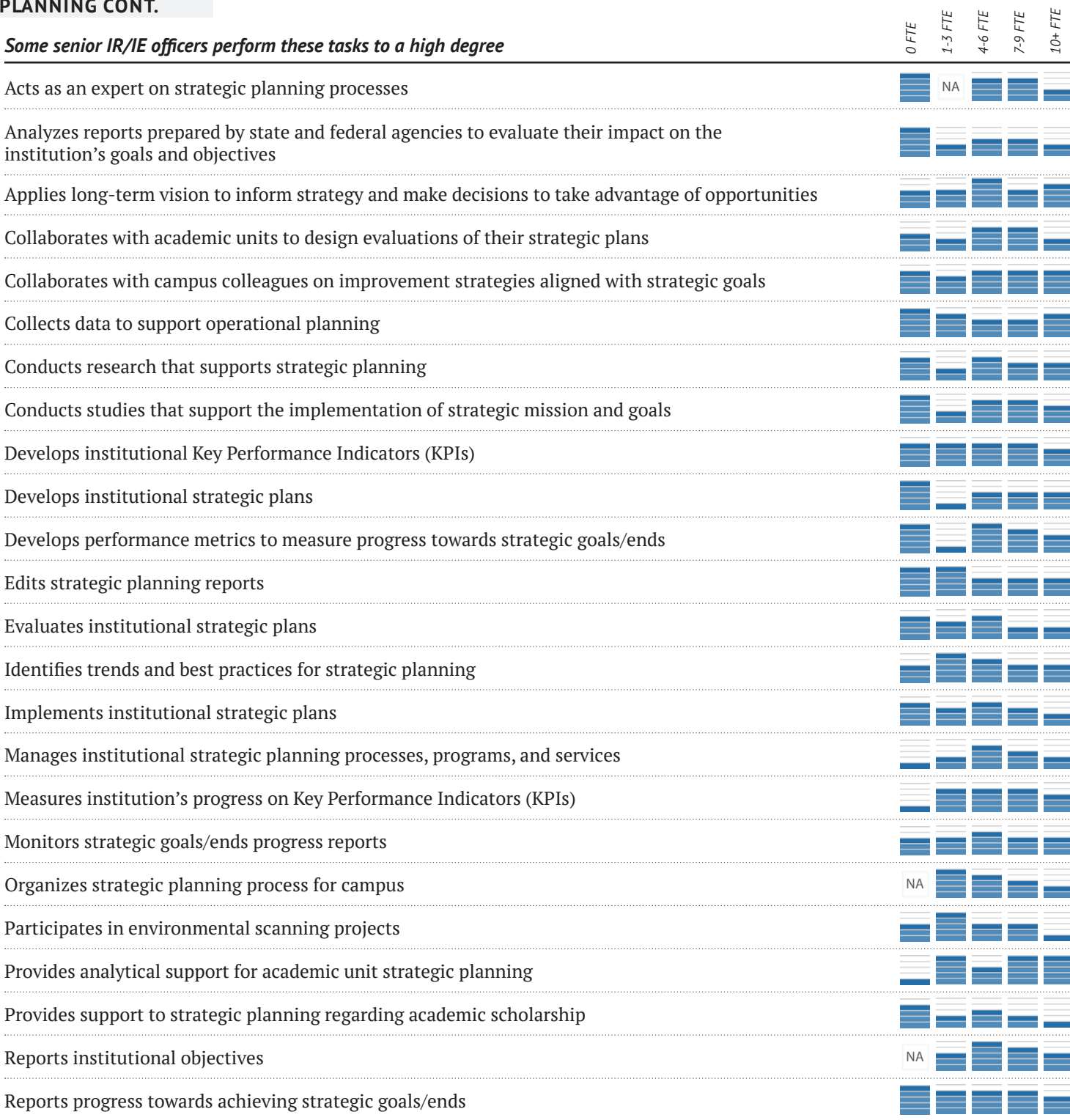


Institutional Research Tasks – Senior IR/IE Officers

To what degree are the following tasks part of your responsibilities?

PLANNING CONT.

Some senior IR/IE officers perform these tasks to a high degree



Few senior IR/IE officers perform these tasks to a high degree

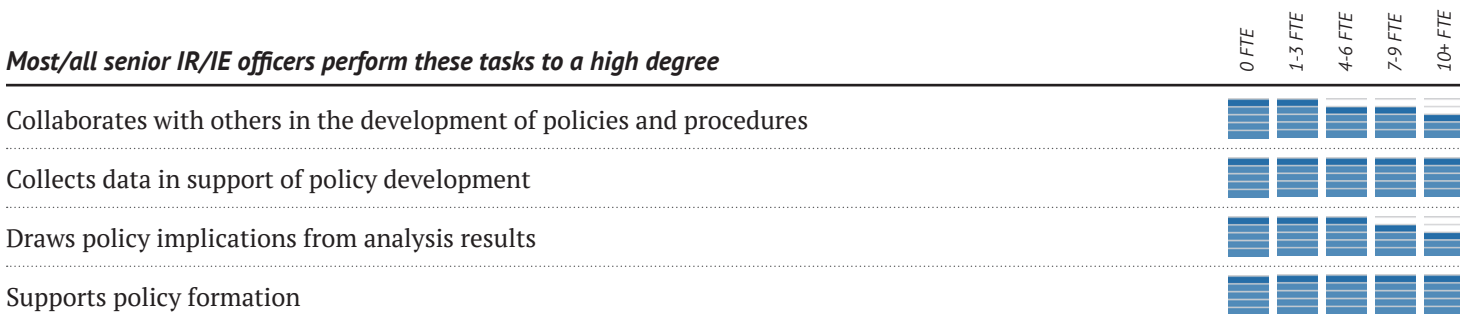


Institutional Research Tasks – Senior IR/IE Officers

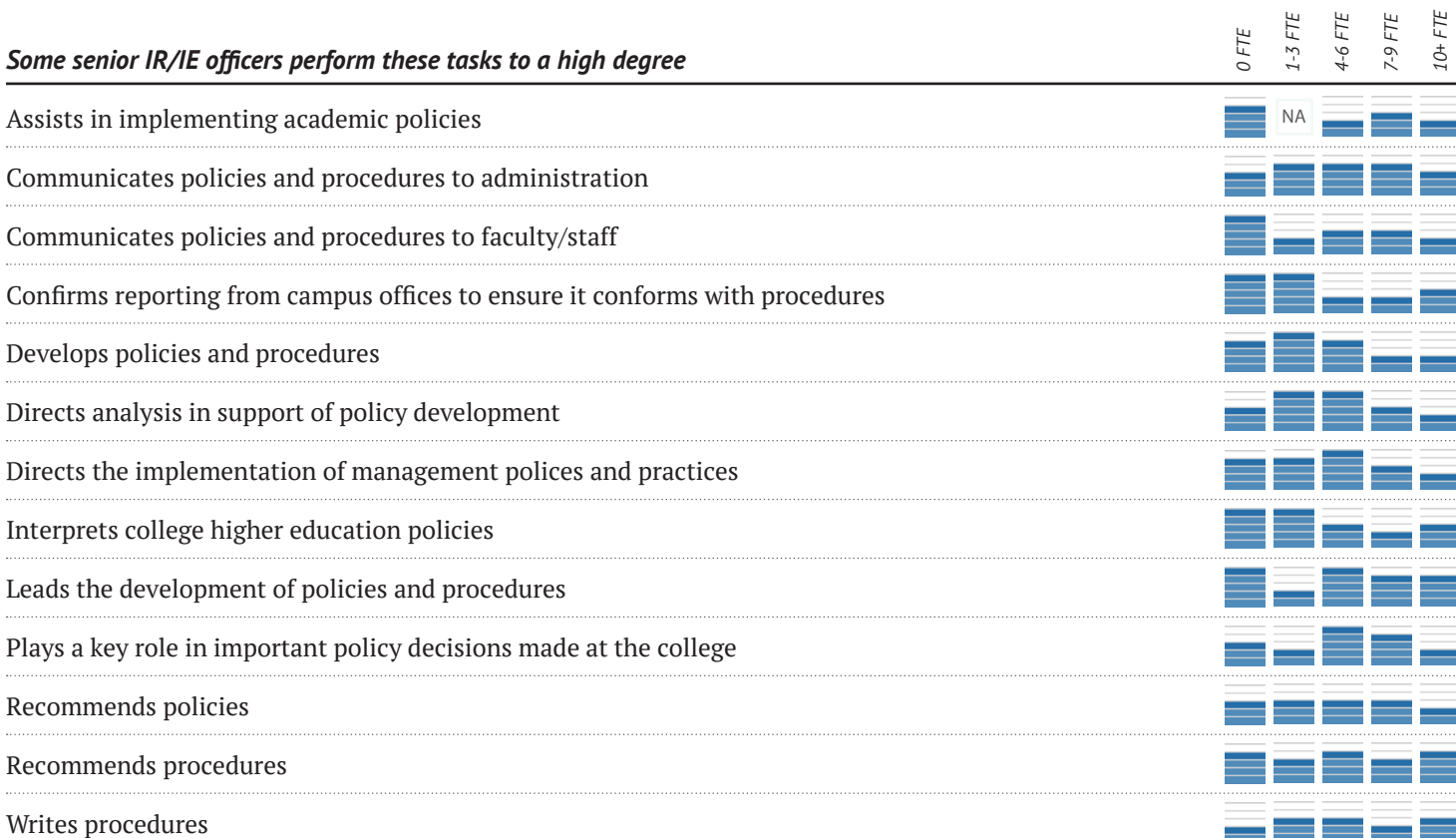
To what degree are the following tasks part of your responsibilities?

POLICIES AND PROCEDURES

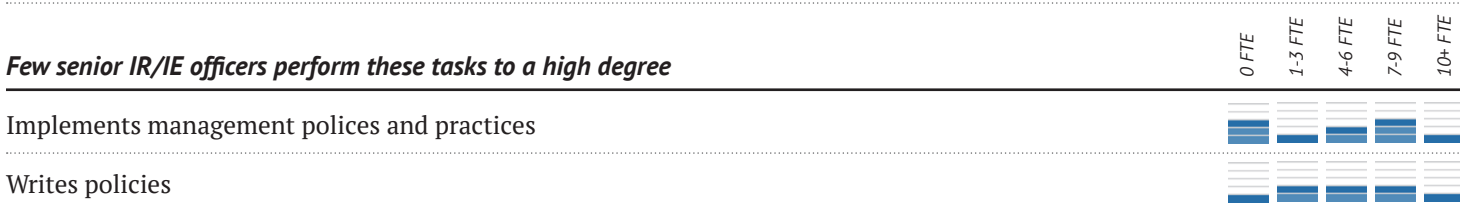
Most/all senior IR/IE officers perform these tasks to a high degree



Some senior IR/IE officers perform these tasks to a high degree



Few senior IR/IE officers perform these tasks to a high degree



PROGRAM DEVELOPMENT



Institutional Research Tasks – Senior IR/IE Officers

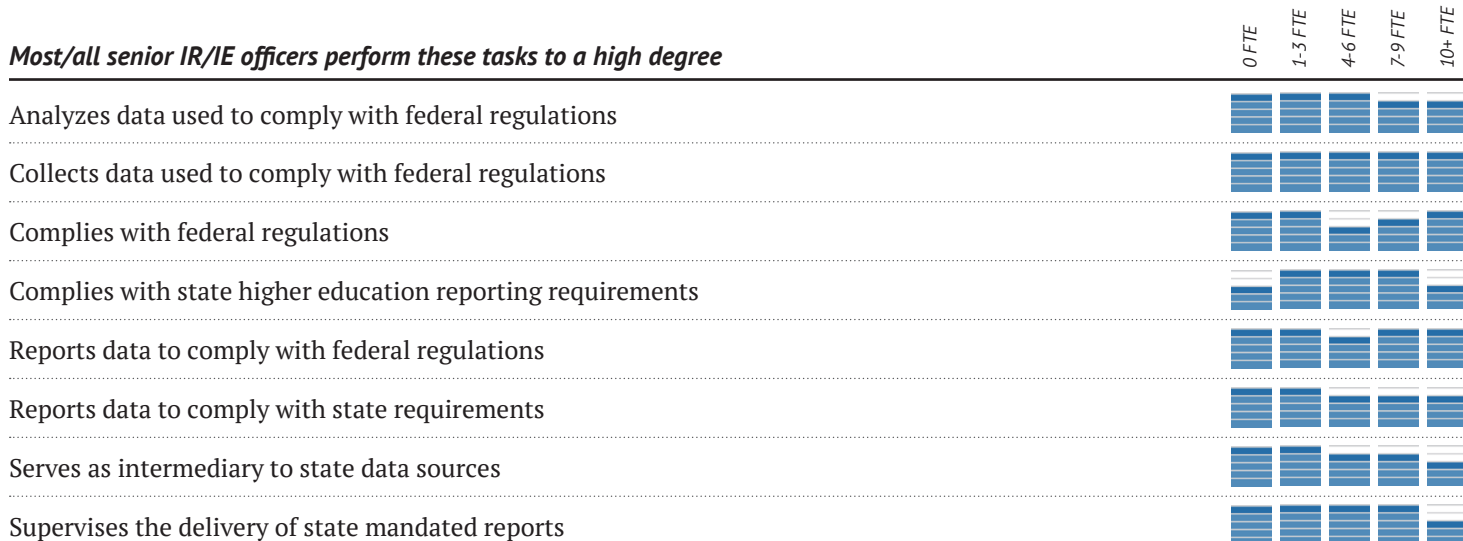
To what degree are the following tasks part of your responsibilities?

PROGRAM DEVELOPMENT CONT.

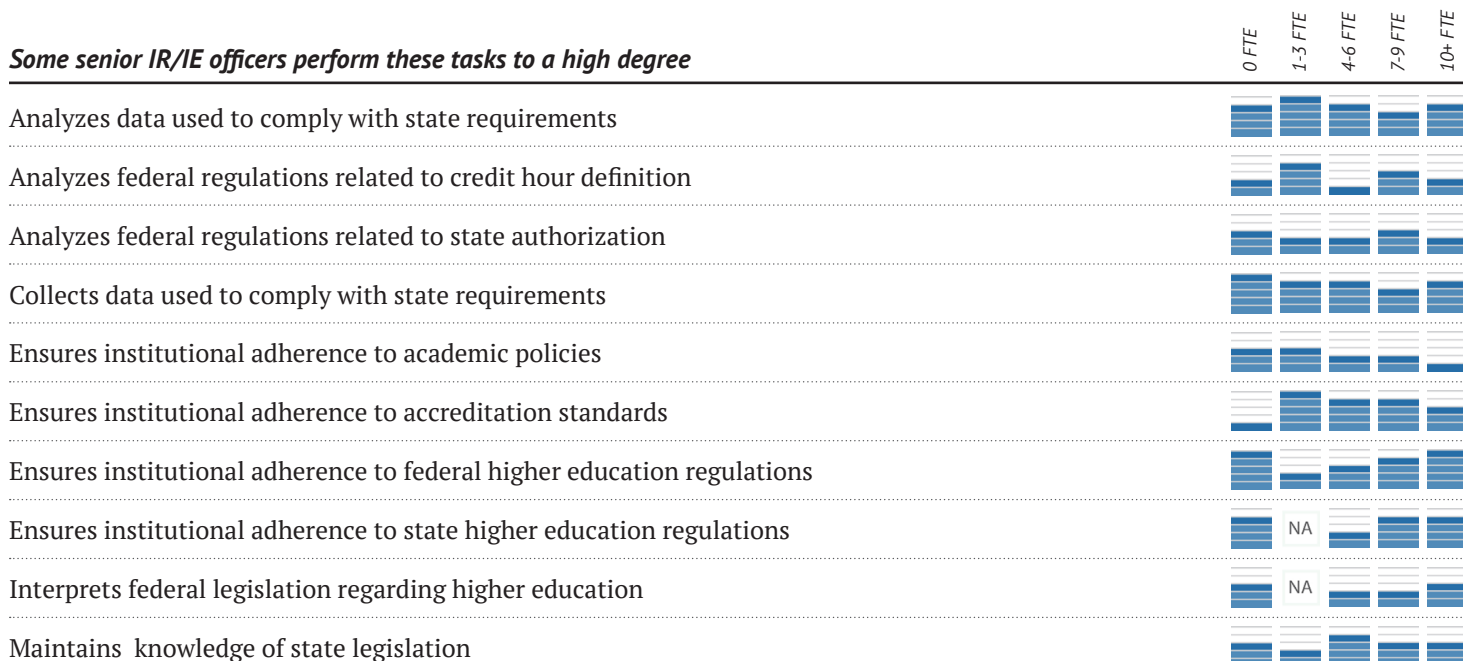


REGULATIONS AND POLICIES

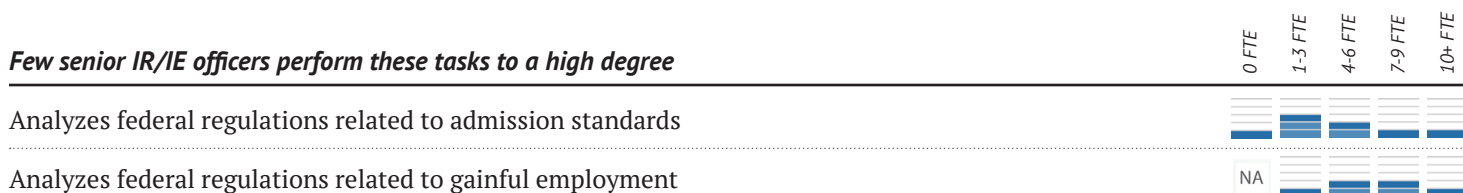
Most/all senior IR/IE officers perform these tasks to a high degree



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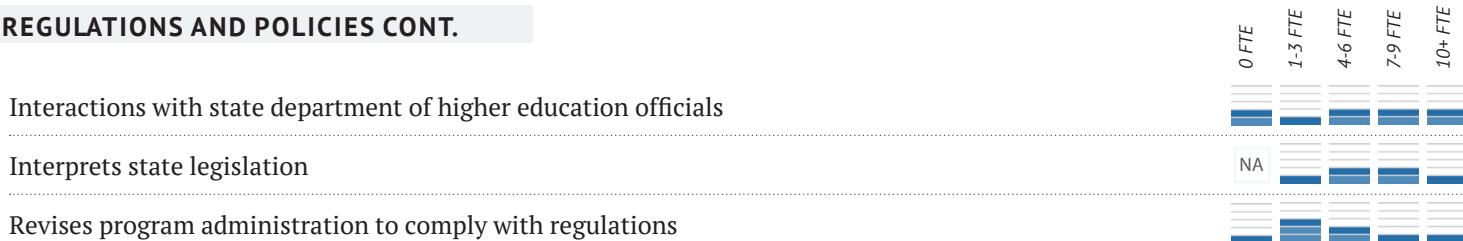
Few senior IR/IE officers perform these tasks to a high degree



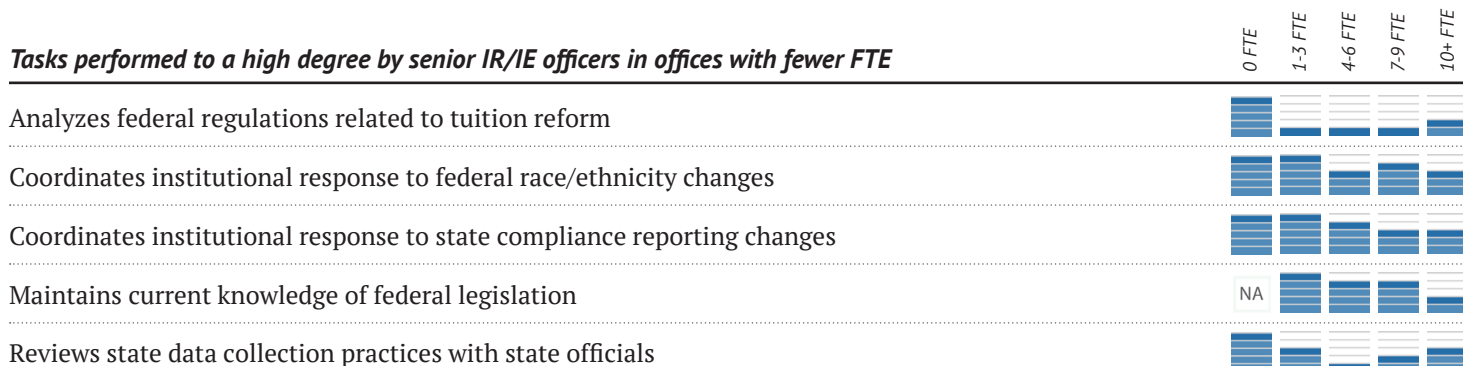
Institutional Research Tasks – Senior IR/IE Officers

To what degree are the following tasks part of your responsibilities?

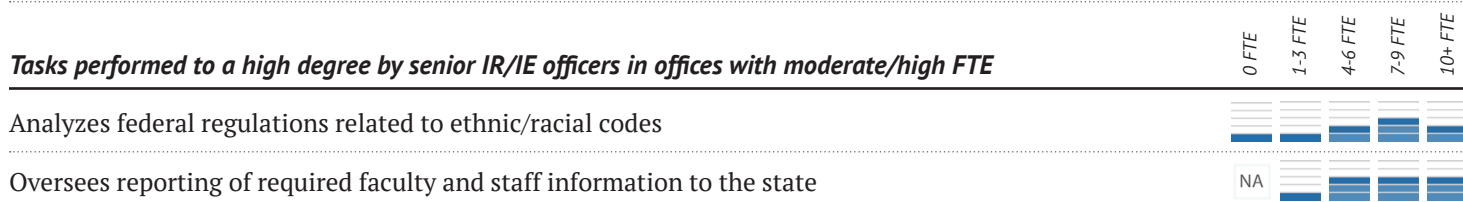
REGULATIONS AND POLICIES CONT.



Tasks performed to a high degree by senior IR/IE officers in offices with fewer FTE

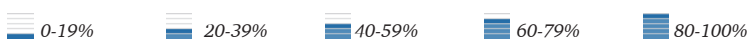
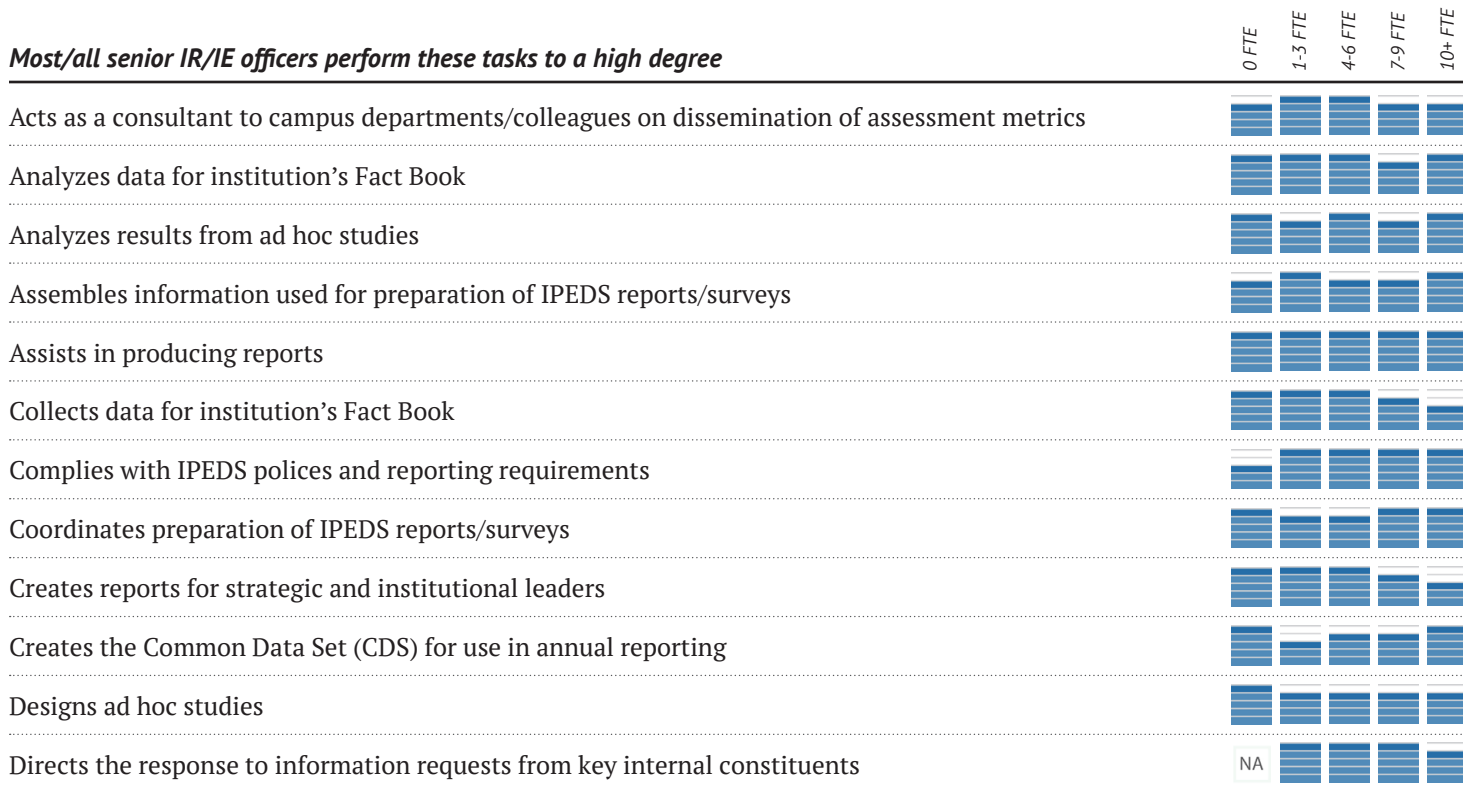


Tasks performed to a high degree by senior IR/IE officers in offices with moderate/high FTE



REPORTING

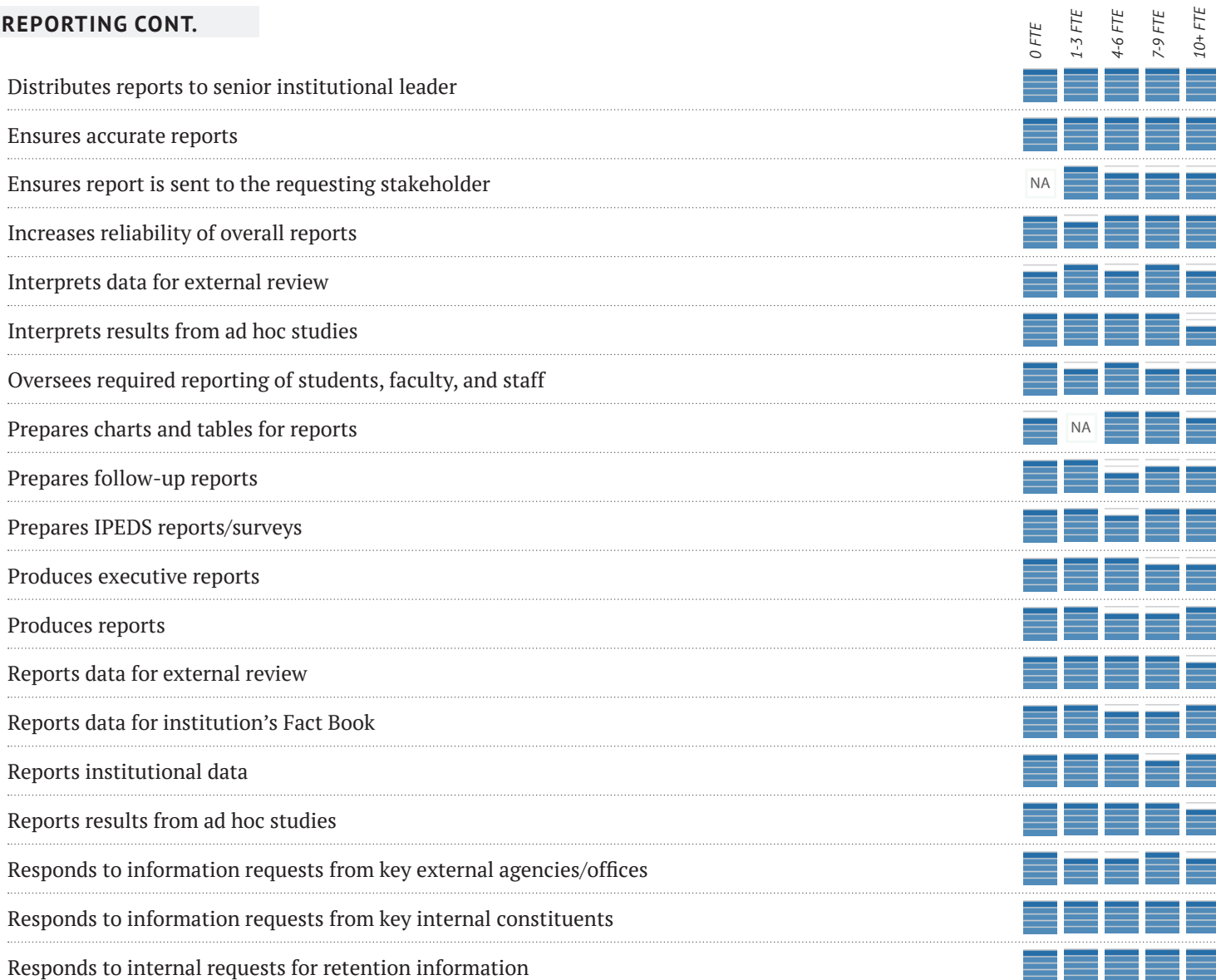
Most/all senior IR/IE officers perform these tasks to a high degree



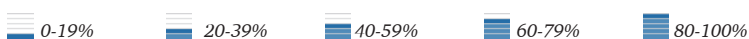
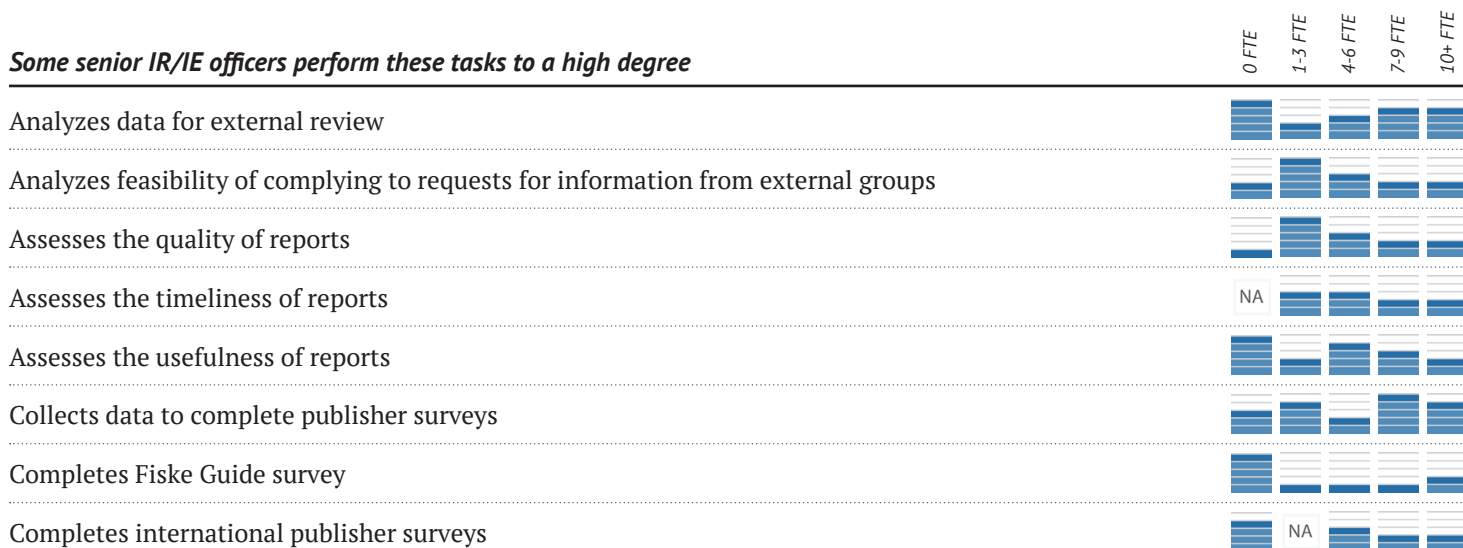
Institutional Research Tasks – Senior IR/IE Officers

To what degree are the following tasks part of your responsibilities?

REPORTING CONT.



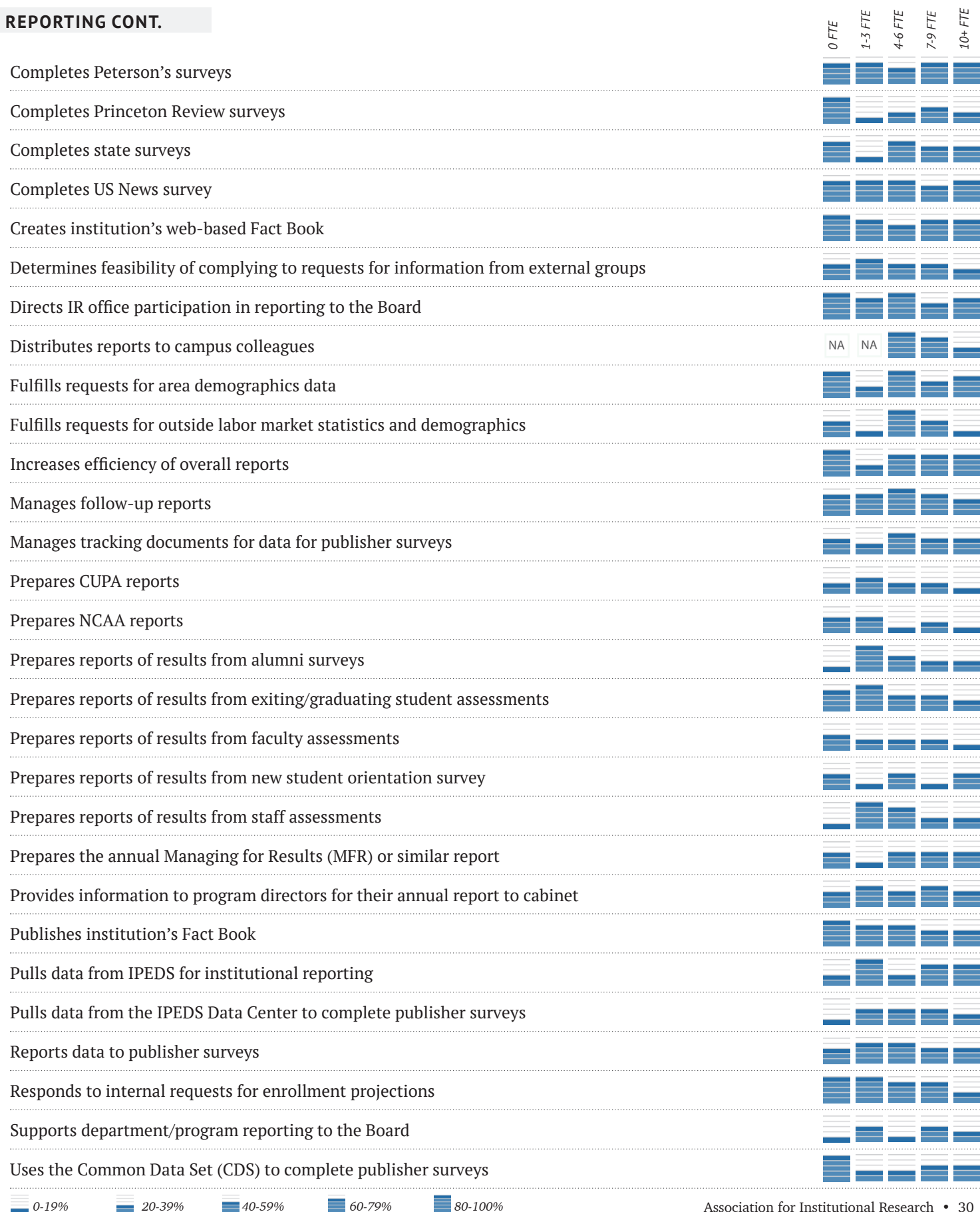
Some senior IR/IE officers perform these tasks to a high degree



Institutional Research Tasks – Senior IR/IE Officers

To what degree are the following tasks part of your responsibilities?

REPORTING CONT.



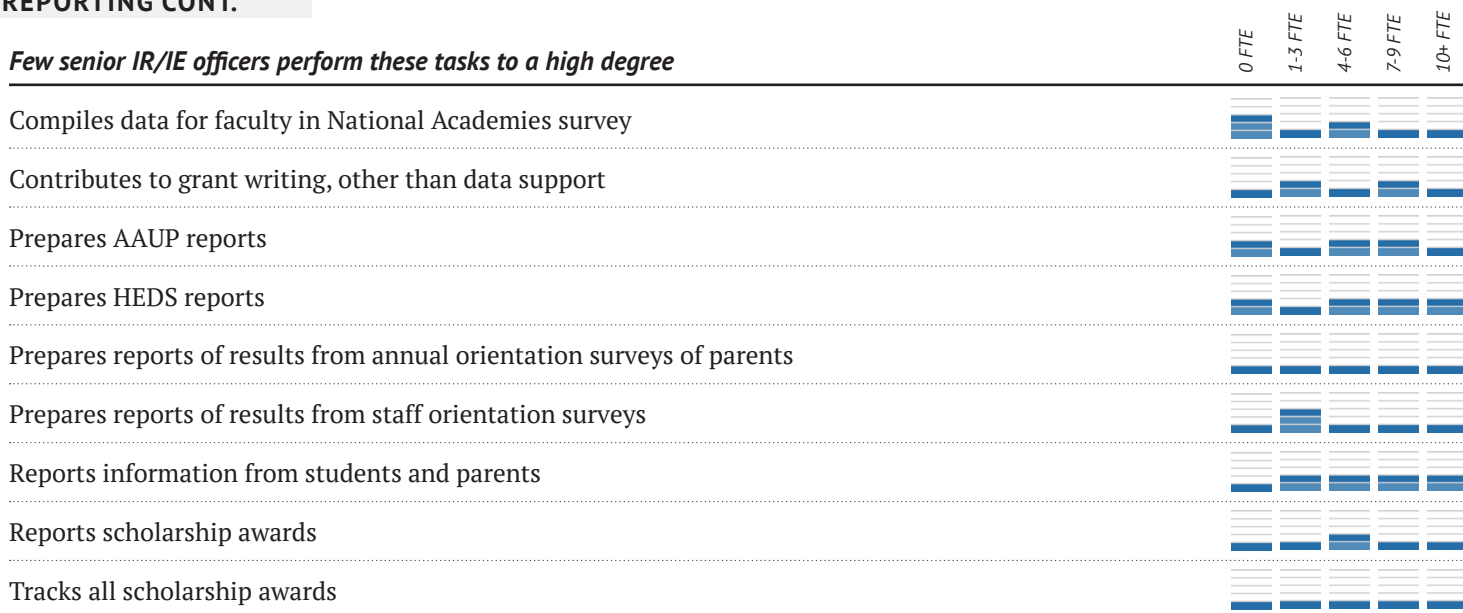
0-19% 20-39% 40-59% 60-79% 80-100%

Institutional Research Tasks – Senior IR/IE Officers

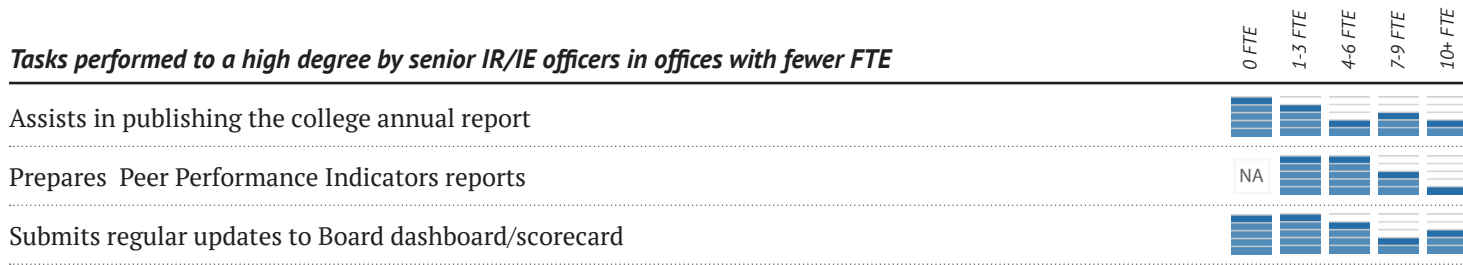
To what degree are the following tasks part of your responsibilities?

REPORTING CONT.

Few senior IR/IE officers perform these tasks to a high degree



Tasks performed to a high degree by senior IR/IE officers in offices with fewer FTE

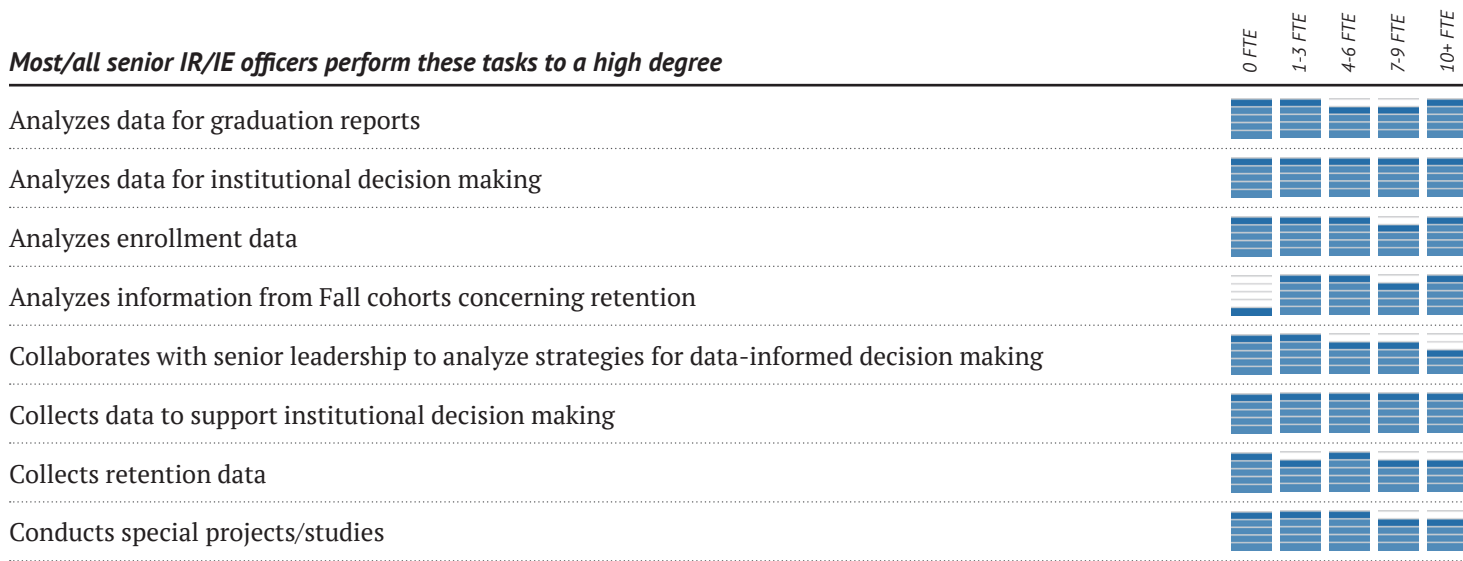


Tasks performed to a high degree by senior IR/IE officers in offices with moderate/high FTE



RESEARCH

Most/all senior IR/IE officers perform these tasks to a high degree



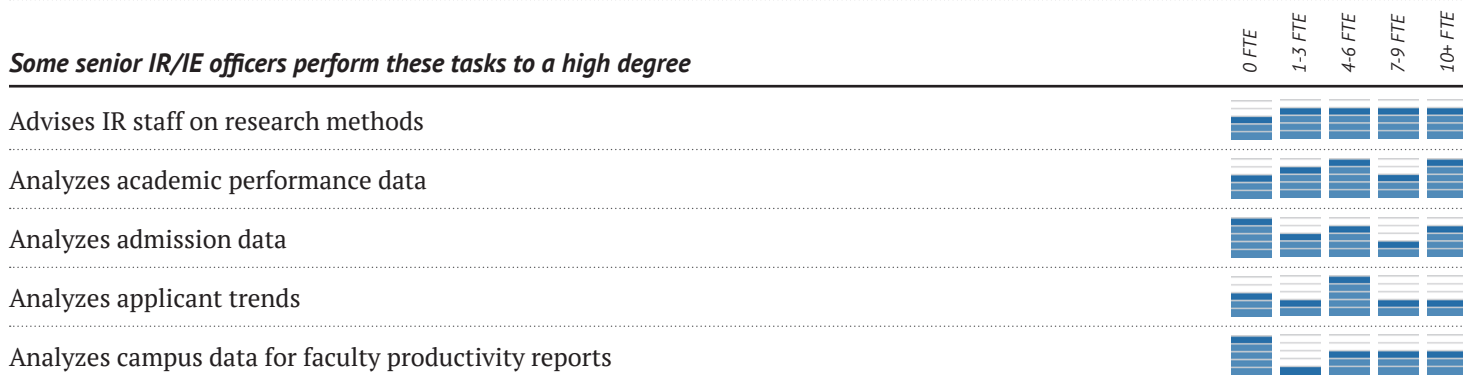
Institutional Research Tasks – Senior IR/IE Officers

To what degree are the following tasks part of your responsibilities?

RESEARCH CONT.



Some senior IR/IE officers perform these tasks to a high degree



Institutional Research Tasks – Senior IR/IE Officers

To what degree are the following tasks part of your responsibilities?

RESEARCH CONT.



Institutional Research Tasks – Senior IR/IE Officers

To what degree are the following tasks part of your responsibilities?

RESEARCH CONT.

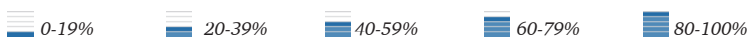


Institutional Research Tasks – Senior IR/IE Officers

To what degree are the following tasks part of your responsibilities?

RESEARCH CONT.

Few senior IR/IE officers perform these tasks to a high degree

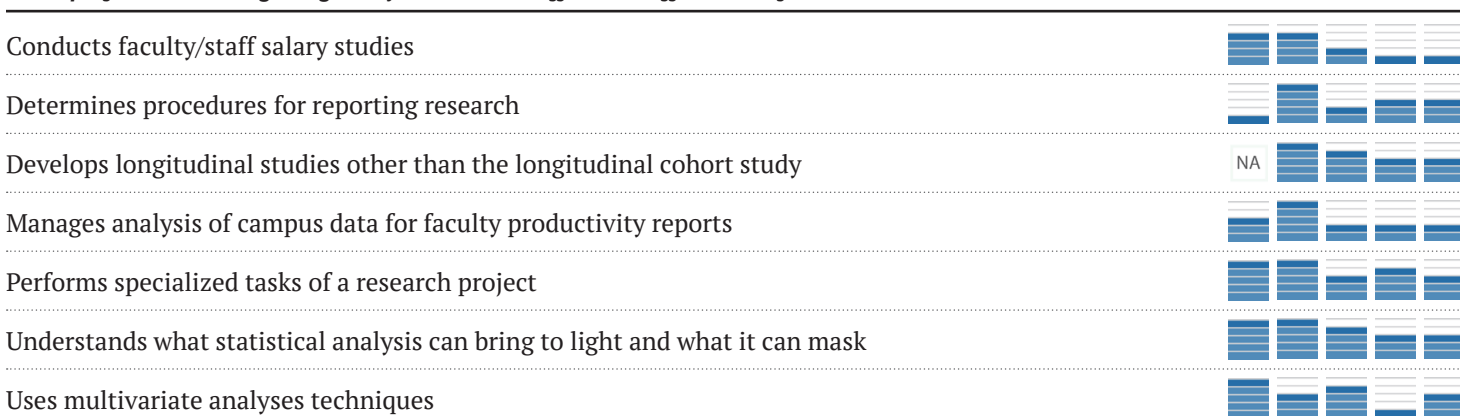


Institutional Research Tasks – Senior IR/IE Officers

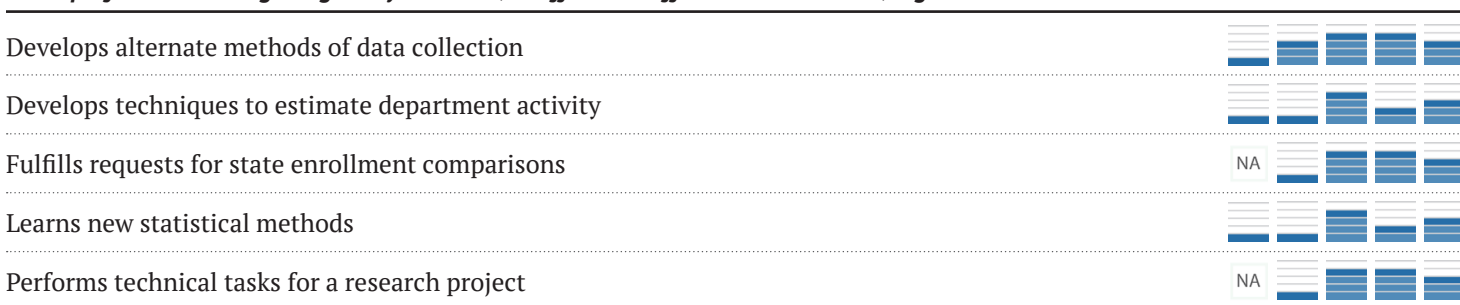
To what degree are the following tasks part of your responsibilities?

RESEARCH CONT.

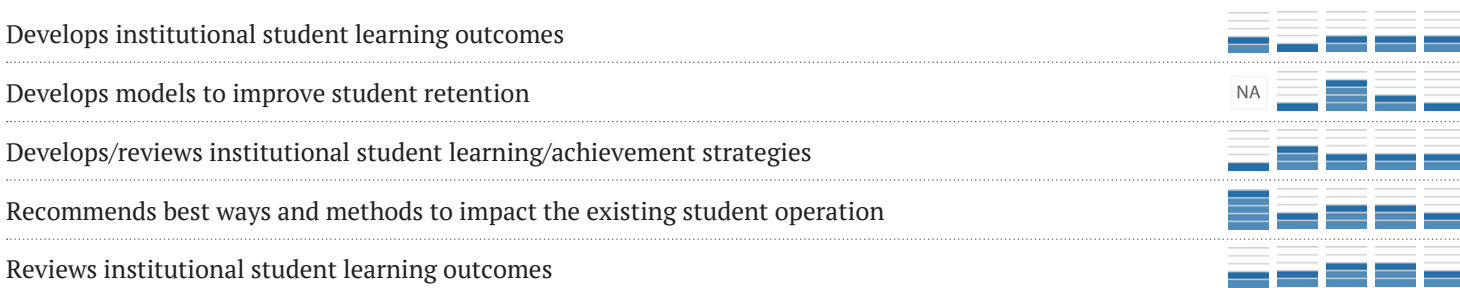
Tasks performed to a high degree by senior IR/IE officers in offices with fewer FTE



Tasks performed to a high degree by senior IR/IE officers in offices with moderate/high FTE



STUDENT SUCCESS



DEFINING INSTITUTIONAL RESEARCH: FINDINGS FROM A NATIONAL STUDY OF IR WORK TASKS

A FOCUS ON SENIOR IR/IE LEADERS

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Data and Decisions for Higher Education

WWW.AIRWEB.ORG
EMAIL: AIR@AIRWEB.ORG

1435 E. PIEDMONT DRIVE, SUITE 211
TALLAHASSEE, FL 32308

PHONE: 850.385.4155
FAX: 850.385.5180