October 3, 2023

Thursday, September 28, 2023 10:03 AM

Agenda
9:00-10:30 AM

Presenter	Discussion Item	Resources/Links
Erika	College Council Updates • Recent Vote • Website Update • Getting our name out there	
All	Data pulling concerns	
All	Query/Report Training • Develop subcommittee to create an action plan??	
Erika	RIP Legacy • How are we handling old data now that Legacy is gone? i.e. unofficial transcripts	
Erika, Katie, Stephanie, Jack/David/Victor	Updates on Data Dictionary • HCM Report out • FIN Report Out • CS Report Out • Jack/David Report out Victor Designated as the DD Driver	Data Dictionary Files link: Data Dictionary (also located in DC Team - Resources - Data Dictionary)

	<u>Meeting notes:</u>
	College Council Update
	• New website will have a page for college council and sub-council pages
	• Data council should have a submission form
	• Week or two after meeting have everyone review and notes and post them to the website
	
	Data pulling concerns-Outreach
	• We need a process for requesting reports
	• Some kind of data seal that we can put on our reports to say they are Data Council approved
	• Culture of collaboration
	• Data requests currently have a report form like IE has, but we haven't received any requests (IE gets a few a month)
	• This should be tailored by each department/pillar
	• Central point/ticketing system to send requests that can then we forwarded to the correct person
	• What is that the requester actually needs? Part of the workflow would be to schedule a time to sit and discuss their request
	• CRM- is a whole other issue. You either have all access or no access. But Danielle needs to know how to
	
	<u>Possible Workflow:</u>
	1. Fill out form (direct requester to the form when they contact us via email, teams, etc). Enforcing the form will be very important to collect data.
	2. Sets assigned to Data Council Rep
	3. Rep schedules meeting with requester to get further information
	4. If Data Council member feels like they need to meet with DC regarding request- relay this to the requester
	5. Loop in pillar lead to make sure they should have this kind of data
	
	<u>Edits of IE request form to use for our form:</u>
	• What pillar?
	• Date need by?
	• Date range?
	• Known data point
	• Known relative queries
	• Frequency of report?
	• Who are you going to be sharing this with? How is it going to be used?
	• Where is this request originating from?
	• Overall question= What do you want to know? What is the answer you're looking for?
	• Internal and External form/process
	  ○ Policy/Process for those public records requests to forward to HR
	
	Query/Report Training
	• We need to create a workflow training (either as a whole council or a couple people take this on)
	
	Legacy
	• Any data gaps?
	  ○ Registrar: students can no longer look-up their own	

Melissa Rodriguez 8:55 AM

Hi Erika! As per our conversation, please see here some of the challenges we experience with data. I have copied Danielle in the chat, as some of our struggles relate to CRM reporting.

Challenges with data:

- Identifying indicators that could inform our work that are actually measurable (not dirty data).
  - Example: students enrolling from specific high schools and number of applications completed are not available due to system or input errors.
  - When these problems are identified, alternative measures are not offered/suggested.
  - Also, sometimes data is requested and provided only later to receive notification that the original data was no good. This causes distrust in any and all data.
- Working to develop reports – We are struggling to develop and understand reports from the CRM. For every edit to a report, we must work directly with FER since we don't understand how to edit stuff like this:
  - =AggDistinctCount(If(And({Person Student Status.student_status_category}='Inquiry', DateValue({Person Student Status.student_status_date}) <= YOYDate(Right({Person Student Status.status_entry_term},4)-Year(Today()))), {Person Student Status.entity_id}, null()))
  - At CBC, data experts have worked with the Fire Engine Red to develop, understand, and pull reports.

	previous transcripts ○ Do we foresee any issue collecting data needed in the future • How are we going to get to this information going forward? ○ We haven't formally locked anyone out yet. • IE can get us certain data because they still have frozen files • SB did give us one last dump of data, but using that is going to be a heavy lift for data analysts • Katie ran ledgers going back to 2016- it won't have all data Data Dictionary • We need to develop an action plan to get this done- Victor will be point person • Strategic Plan- KPIs ○ What do we report on? ○ Are there solid KPIs we should be working on? ▪ Balanced budget ▪ Hiring certain demographics that reflect our area ▪ Nick- topics on discussion at IEC. Iron out KPIs and the ways strategic plan will be evaluated • FERPA starts with enrolled student, and continues through the life of the student New meeting time: 1st Tuesday at 1:30pm **<u>To Do:</u>** ☐ Process for reviewing notes so we can upload them to our Data Council webpage ☐ David/Victor connect with Joshua/Nyx and replicate the IE form to bring to next meeting ☐ Erika will make a graphic for the workflow ☐ Collaborative meeting with IEC- Oct 10th Erika and David will join (optional for rest of team) **For next meeting:** 1. Request Form from David & Victor 2. Feedback/issues for each area with Legacy Link **<u>Attendance:</u>** Jack C, Stephanie G, Victor L, Erika B, Katie R, David R, Joshua S, notetaker: Jessica R	